



Case Study: Legal Request Process – 30-Minute Advisory Intervention

Executive Summary

The Legal and Sales teams were struggling with an unstructured request process. Work arrived through email, Teams messages, conversations, and stray documents, creating delays, inconsistent information, and no audit trail. The business assumed a complex system might be required, but the real issue was the absence of a clear, governed process.

This case study shows how a 30-minute advisory intervention created a simple, resilient request workflow using existing Microsoft 365 capability, restoring clarity, ownership, and control.

Challenge

The existing process had several risks:

- No single point of entry for legal requests
- Missing or incomplete information at submission
- No visibility of request status
- No audit trail or accountability
- Heavy reliance on individuals remembering details
- High potential for errors, delays, and lost requests

The team needed a simple, reliable, low-overhead solution that could be implemented quickly without new software.

Intervention

A 30-minute advisory session identified a lightweight, high-resilience approach using existing Microsoft 365 capability. The solution included:

- A structured SharePoint list to capture all legal requests
- Mandatory fields to ensure complete information at submission
- Automated tracking of request status
- Clear ownership and visibility for Legal and Sales
- A simple, repeatable workflow that requires no new tools or training

The design avoided complexity and focused on clarity, governance, and ease of use.

Outcome

Within the 30-minute session:

- The Legal team gained a single, controlled entry point for all requests
- Sales gained visibility of progress without chasing individuals
- The process became auditable, consistent, and easy to manage
- No new systems or licences were required

- The business avoided building a custom solution or relying on email chains

The approach is now a repeatable pattern for other lightweight request processes across the organisation.

Value Delivered

This short intervention delivered:

- Reduced risk of lost or incomplete requests
- Improved turnaround time and clarity
- A scalable, low-maintenance process
- A governance-first solution using existing tools
- A practical example of how small advisory inputs can unlock significant operational improvements

It also becomes a strong Datum Advisory case study demonstrating how structured thinking and minimal tooling can solve problems that previously felt “too messy” to tackle.

Why This Case Matters for Datum Clients

This project demonstrates how clarity and governance can transform a messy, high-risk workflow:

Governance-First Thinking	Establishing a single controlled entry point for all legal requests.
Process Ownership	Clear responsibility for managing and progressing requests.
Consistency and Completeness	Mandatory fields removed ambiguity and reduced rework.
Visibility and Control	Sales gained progress transparency without chasing individuals.
Simplicity Over Complexity	Solving the problem with existing tools avoided unnecessary systems and cost.

For SMEs, this case shows how lightweight advisory input can remove friction, reduce risk, and create repeatable patterns that can be applied across other request-driven processes in the organisation.