Rest The Case: AI Automation for a Fast-Scaling Legal-Tech Platform

Six PGDM students at Lexicon MILE's HyperBuild AI Lab built two live AI tools, a brand foundation and a CRM for Rest The Case, the Pune legal-tech platform behind 20,000+ legal cases and services.

About Rest the Case

Rest The Case (RTC) is a Pune-based legal-tech platform founded in 2021 by Ms. Shreya Neeraj Sharma, with a simple aim: to bridge the gap between India's complex legal system and the common person's ability to access it. In a few years it has become one of the country's fastest-scaling legal-tech platforms, connecting individuals, businesses and law students with 3,000+ verified lawyers across 200+ cities, and facilitating over 20,000 legal cases and services.

RTC works as a two-sided platform, with clients on one side and advocates on the other. That makes every operational gap felt twice: a slow reply to a client is a lost lead, and an inconsistent process on the lawyer side weakens trust in the platform. RTC partnered with Lexicon MILE's HyperBuild AI Lab, and a team of PGDM students worked on its live problems as part of the Business Immersion Program (BIP), not a simulated case study.

Business Problems

As RTC scaled, its internal systems did not keep pace. A large and growing volume of client and lawyer enquiries still came in through Instagram, WhatsApp, calls and spreadsheets, and was handled by hand. In legal services, the person reaching out is often anxious or short on time, so a slow or generic first reply can be the difference between a client who stays and one who walks away.

RTC's brief to us had three goals: a systematic lead generation and engagement strategy, automation for content and marketing, and a centralised system for client and lead data. Behind those goals, our diagnosis found four connected root causes:

- **Manual, inconsistent replies on Instagram.** RTC's busiest channel depended on whoever happened to be free to respond.
- **No way to triage urgency at first contact.** A routine consumer query and an urgent property dispute went through the same intake, with no early signal for prioritising.
- **Fragmented lead and client data.** Leads were spread across social platforms, WhatsApp threads, spreadsheets and individual memory, so it was hard to see where a lead came from or follow up consistently.
- **Visibility that lagged real scale.** RTC's digital presence did not yet reflect the size of what it had built, and it had no documented brand voice to keep its messaging consistent.

Research Method: Our Problem-Solving Approach

We used a descriptive, applied research design: a qualitative, audit-driven diagnosis, followed by iterative build-and-test. We ran no end-user survey, by design. Our deliverables are operational tools, so

the most useful evidence was RTC's own platform data, the competitive landscape, and the people who run the workflows every day.

- **Secondary research.** We studied the Indian legal-tech sector and reviewed six competing platforms using Kotler's competitive advantage framework. We also worked through RTC's objectives brief, content plan and lead engagement calendar, and public metrics from each platform.
- **Platform audits.** We audited RTC's Instagram, Facebook, LinkedIn and YouTube accounts checkpoint by checkpoint, using native analytics, Meta Business Suite and Google Analytics.
- **Stakeholder discussions.** We held ongoing conversations with RTC's marketing and leadership team to validate the diagnosis and fit each tool to how the team actually works.
- **Enquiry review.** We looked at real Instagram DMs and comments to understand common enquiry types and response-time gaps.
- **Build and test.** We ran sample enquiries through the scoring logic, tested the automated DM flow end to end, and checked early CRM structures against real lead scenarios.

We ranked the root causes by how often they surfaced and how directly they led to lost leads. Slow manual response and missing urgency triage came out on top, so they became two quick-turnaround tools. Fragmented data, a structural problem that needs more time, became a longer-term CRM. Throughout, we favoured speed of deployment, ease of maintenance by RTC's own team, and a single consistent brand voice. That led to a deliberate no-code-first approach.

Solutions Delivered

We designed and built four connected solutions. The Brand Guidelines set the voice every other piece follows. The Legal Health Score sits at the top of the funnel, turning cold outreach into a qualified lead. The Instagram DM automation speeds up the first response once someone reaches out. The CRM is the single system both ultimately feed into.

1. LegalIQ: The Legal Health Score

LegalIQ is a free, AI-powered legal health check for founders and business owners. Twenty-five plain-language Yes/No/Unsure questions score a business out of 100 across five pillars, each out of 20: Litigation Health, Contractual Health, Compliance Health, Legal Cost Efficiency and Future Risk Exposure. The result is an auto-generated PDF report with a spider-chart dashboard, delivered by WhatsApp or email, and RTC receives a qualified, contactable lead in return.

2. Instagram DM Automation

When someone comments one of five trigger keywords under an RTC Instagram post, an automated workflow sends them a personalised direct message. The message introduces RTC's core services (finding a lawyer, legal document templates and plain-language legal information) and links to the website. The first reply goes out without waiting for a team member to be online.

3. Brand Guidelines

RTC had no documented brand voice, so we wrote one from scratch: brand story, mission and values, visual identity and tone of voice. It is now the reference for the Legal Health Score's report language and the DM automation's reply, so RTC's tools read as one organisation.

4. Internal CRM

The CRM is being built to record every lead, its source, its Legal Health Score and its follow-up status in one place. It is the most structural of the four deliverables, because it has to reconcile data from several channels, and it remains under active development.

Business Impact

Both live tools work end to end. Together they move RTC from lead engagement that depended entirely on manual, ad-hoc effort to a setup where two tools already reduce that dependency, with a third in progress to tie them together.

- **Faster, more consistent first response.** Instagram comments now get an immediate, on-brand reply regardless of staff availability.
- **Value-first lead capture.** A prospective client gets something back straight away, a legal health report, in exchange for a few minutes of input and their contact details.
- **An early read on legal exposure.** The five-pillar score shows founders, and RTC's team, where a business's risk sits before a lawyer is engaged.
- **One brand voice.** The new Brand Guidelines keep RTC's tools and content consistent.
- **A path to one system of record.** The CRM is designed so every lead lands in one place instead of being scattered across tools and people.

Both tools (LegalIQ & Instagram Automation) went live close to the end of the programme, so we report this impact qualitatively. We have not yet measured lead volume, conversion or engagement, and we would rather say so than overstate it.

AI Tech Stack Used

Component	Platform	Role
LegalIQ (Legal Health Score)	AI Assisted Vibe Coding	Question and scoring engine, PDF report with spider chart, lead capture
Instagram DM Automation	n8n workflow automation, Meta Graph API	Receives comment events, matches keywords, sends the DM
Internal CRM	AI Assisted Vibe Coding	Lead records, sources and follow-up status

We chose no-code, AI-assisted tools on purpose. They let working systems go live inside a single programme term, and RTC's own team can update keywords, reply templates and assessment logic without a dedicated engineer. The trade-off is that the tools are only as current as the last person to update them. For the research phase we used Instagram Insights, Facebook Page Insights, LinkedIn Analytics, YouTube Studio, Meta Business Suite and Google Analytics.

Students Involved

The project was carried out by Team Rest the Case, six students of the PGDM programme (Batch 2025–27) at Lexicon MILE:

- Abdul Malik
- Aayush Jain
- MD Shadab Khan
- Prachi Goenka
- Rishabh Mishra
- Soma Parvin

The team worked under the guidance of faculty mentors Prof. Deepak Gupta, Head – AI & Analytics, and Dr. Raju Verghese, Director – GMBA, and with the RTC marketing and leadership team, whose time and openness shaped the work.