



## **Safari SOP Reinvents Legal Workflows Again**

First and only purpose-built system for subpoena response and account garnishment processing

August 5, 2022

Safari SOP, a Bellevue, Washington-based software company, has built the first online system for law departments and legal order processing teams to handle subpoenas, document requests, account garnishments, and levies. While launching in 2020 during a global pandemic had presented challenges, Safari has quickly achieved broad corporate adoption, and has “crossed the chasm” to both small and large law departments, including Fortune 100 banks and two of the top five employers in the United States.

If the name sounds familiar, you may recognize the team behind Safari SOP. Twenty years ago they built Serengeti Tracker, which transformed electronic invoice processing for corporate law departments. Built in 2001, Serengeti Tracker quickly grew to become the world’s largest and highest-rated e-billing and matter management solution, connecting hundreds of corporate law departments with thousands of law firms around

the world. In 2010, Serengeti agreed to be acquired by Thomson Reuters and is now called Legal Tracker.

The Serengeti team reunited in 2019 as a new company called Safari SOP (“SOP” standing for “service of process”). Just as Serengeti saw the opportunity to transform legal invoicing, Safari is exploiting a similar opportunity to help companies replace outmoded processes for handling large volumes of subpoenas, account garnishments, and levies.

“Like the old days before e-billing, most companies are still using paper, spreadsheets and email to manage these other legal processes,” said Tom Melling, Safari SOP’s CEO. “Our users can now automatically apply new best practices, improve their productivity, and recover their costs, all in one easy-to-use online system.”

The idea for Safari SOP came several years ago when a bank contacted Melling to ask if he knew of any subpoena response software solutions. The bank explained that they were looking for a better way to deliver responsive documents electronically, and also to collect invoice payments for their large volume of subpoena response work. “The bank was sending out paper invoices for their expenses,” explained Melling, “and they were frustrated by wasting additional time trying to collect, which only succeeded 20% of the time. They were looking for ways to transform this large cost center into a more efficient revenue generator.” At the time no such system existed, so the Serengeti team used their expertise to build the system that their customers needed but couldn’t find.

The heart of Safari is its “SecureShare” document delivery portal. Typically, companies deliver responsive legal documents via paper, email, flash sticks, encrypted email, or even FTP sites - each of which presents significant problems. For example, email typically imposes file size limitations, and encrypted email and FTP sites present additional challenges of managing credentials with a third party with whom the law department has no prior relationship. Photocopying and overnighting paper responses is time-consuming and expensive, and sending flash drives violates most law department and law firm security protocols. SecureShare’s online portal eliminates all of these challenges, with no limits on file size, file type, or number of files for delivery, and no delivery costs or delays. It captures a permanent audit trail of when documents are made available to and downloaded by the serving party. All document deliveries are fully encrypted (at rest and during transmission). And with two-factor authentication built in, Safari conve-

niently handles all aspects of user IDs and passwords with the serving party.

A unique feature that is driving widespread adoption is the way that Safari handles cost recovery: simply checking a box auto-generates an invoice. When the requesting party receives notice that responsive documents are ready for them on the portal, they can see that the files are ready for download, but they must first pay the company's invoice using a standard credit card processing interface. The SecureShare payroll is simple, immediate, and the only cost-recovery solution in the industry. Tyler Williams, Associate General Counsel of ABC Supplies, reports that "[w]ith Safari's cost recovery features, we're collecting more in one month than we did in the past 16 years."

While automating cost recovery is always an attractive selling feature, Safari has also found that users also strongly value improved productivity and visibility. Customer's report saving 45 minutes per matter with automated intake, customizable templates for standard document creation and correspondence, key date and status tracking, compliance warnings, automated response delivery and cost recovery, and built-in auditing and reporting. Also, given that so many employees now work from home, implementing an online solution is critical to the new realities of how work gets done.

"Safari provides control and improved productivity over these high-volume processes with third parties," said Melling, "and in some cases, we even turn the law department into a profit center. But we are most proud of our customer reviews. We hear every day how much the users love Safari, and many of our new customers come from referrals."

Last week Safari launched its second product for processing account garnishments and levies. That product targets financial institutions and retailers who receive and process high volumes of legal orders to seize funds. With features such as intake automation, duplicate alerts, compliance warnings, account and funds tracking, key dates, status monitoring, automated templates for correspondence and document creation, and built-in reporting and audit history, Safari helps improve compliance, visibility, task-tracking, and automation to minimize risk.

The Safari team successfully transformed an outmoded spreadsheet and paper process for corporate law departments in 2001. At the request of their customers, they've come back to do it again two decades later!

## Authored by Rob Thomas



Rob Thomas speaks and writes frequently regarding the latest technologies that are being used by corporate legal departments to manage their work more effectively. He practiced law for more than twenty years, including serving as managing partner of a Seattle corporate law firm. He was one of the founders of Serengeti Law, which created the world's largest and top-rated e-billing and matter management system, connecting hundreds of corporate law

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