

THOMSON REUTERS ELITE CASE STUDY KEAN MILLER LLP

ENTERPRISE PROCESS MANAGER AUTOMATES BUSINESS
INTAKE AND SUPPORTS GREEN INITIATIVES



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A NEED TO AUTOMATE BUSINESS INTAKE

Over the past 25 years, Kean Miller LLP has grown to become the largest law firm in the Capital Region of Louisiana with 125 lawyers, 325 employees and four offices. As a natural consequence of this growth, the firm's business processes had become more complex and multi-faceted. To keep up, management implemented a number of technology enhancements to help manage the increasing number of procedures.

Kean Miller has used Enterprise® for its financial and practice management needs since 2000. In 2007, management decided to take the firm's business processes to the next level and assigned Business Process Analyst Vicki Lee to lead the initiative. Because of Lee's tenure with the firm, she was perfectly suited to fill this role, as she knew the firm's processes, policies, and procedures better than anyone. In addition, Lee had embraced a new mission at Kean Miller: To transform the firm into an environmentally responsible company by reducing its carbon footprint. With this effort, she has earned the nickname "Green Queen."

For several reasons, the New Business Intake process was the first on the list to be transformed. The paper form, a double-sided legal-size sheet, was cluttered and confusing, and management often wanted to add new fields that simply would not fit. Completing the form required duplicate efforts to capture the required information. First, lawyers or secretaries had to fill in the form and then the filing manager had to re-enter the information into Enterprise. These steps were also repeated in order to generate the Conflicts report and update the marketing database. Routing the form for approval was time consuming and often bypassed established policies and contingencies. In addition, the paper-based process was preventing the firm from reducing its paper usage.

"We chose Process Manager because it offered a much broader array of capabilities. Plus, we spoke with several Thomson Reuters Elite clients that were continuing to build on this workflow platform with great success."

Vicki Lee
Business Process Analyst

TURNING TO A WELL-RESPECTED PARTNER

When searching for an automated solution to streamline this workflow, Lee naturally sought out the International Legal Technology Association (ILTA), where she had served as a member of the Thomson Reuters Elite Steering Committee for the past five years. She networked with several people to inquire how they manage workflow and eventually concluded that the obvious solution was Enterprise Process Manager™, a solution resulting from a long-standing partnership between Thomson Reuters Elite and Metastorm®, a market-leading business process management company. Process Manager helps firms standardize and automate processes to improve productivity.

The integrated solution was a huge advantage for Kean Miller, because it enabled the firm to automate other procedures like Conflicts searches and check requests through Thomson Reuters Elite. "We chose Process Manager because it offered a much broader array of capabilities. In addition, we spoke with several Thomson Reuters Elite clients that were continuing to build on this workflow platform with great success," says Lee.

KEAN MILLER LLP

With more than 125 lawyers, Kean, Miller, Hawthorne, D'Armond, McCowan & Jarman LLP is a full-service legal firm that provides legal services to Louisiana's business community and Fortune 500 companies in countless industry sectors from its Baton Rouge, New Orleans, Lake Charles, and Plaquemine offices.

CHALLENGE

To transform its New Business Intake process from a manual, paper-based system with an automated and efficient workflow while reducing the firm's carbon footprint.

WHY PROCESS MANAGER?

Firms can streamline business processes and eliminate bottlenecks with a customized workflow solution designed in partnership with Metastorm®, the leading business process management solution provider.

RESULTS

- Speeds New Business Intake process by three to four times
- Increases accuracy and saves valuable staff time with single data entry increases
- Supports green initiative by eliminating the need for paper
- Reduces risk exposure by mandating proper firm policies and procedures

ENHANCED PROCESS AND UNEXPECTED BENEFITS

The New Business Intake procedure has been rolled out to the entire legal staff. One of the biggest changes to the process is the new single data entry, which eliminates multiple entries for different functions and the potential for errors. Once a secretary or lawyer completes the form fields in Process Manager, the automated workflow process takes over. If the matter involves an existing client, the new matter is modeled from a previously opened file to keep the main information consistent.

For a Conflicts search, the information is electronically submitted to Enterprise Conflicts Manager™, and a Conflicts report is generated and attached to the original form. The form is then routed back to the lawyer for approval with an electronic signature. Finally, the form is integrated into the Enterprise Time and Billing system and a new matter number is generated. The firm can now process New Business Intake forms and set up a new client or matter within one day, as compared to several days to a week prior to Process Manager. “Attorneys can even provide approval when they are out of the office to keep the process moving forward,” adds Lee.

The new process directly addressed the breakdowns the staff was experiencing with the manual process. For instance, with the new system, the staff must adhere to firm policies for setting up a new client, rather than going around certain steps in order to quickly get a matter number. Obtaining all the proper approvals with complete information, such as billing arrangements, helps manage firm risk and possible exposure. Furthermore, Lee is reporting significantly more accuracy with electronic data input because of validation and mandatory fields.

The automated workflow also provides a level of visibility into the entire process that never existed before, allowing the staff to be more proactive at this early stage. For example, the billing supervisor is able to view the electronic forms as they are routed through the process. She can make any changes before the information is entered into the Enterprise database, ensuring that time is captured properly on the matter right from the beginning.

One unexpected advantage of the New Business Intake process is the ability to generate a specialized report for the firm’s professional liability insurance carrier. Each year the firm is required to disclose where a lawyer may have ties to a client outside of legal services. Before Process

Manager, this requirement was never implemented as a formal business process, so each year a partner would send out emails to solicit the information before the deadline. Needless to say, it was disorganized and imprecise. With Process Manager, Lee has simply added a custom field to the form for lawyers to disclose that type of information during the Intake process. A report is easily generated at the end of the year.

GOING GREEN CREATES BOTTOM LINE BUSINESS BENEFITS

From Lee’s perspective, the effort to automate business processes was not just about improving workflow, but also changing a mindset. “We have forward-thinking partners who are really serious about reducing our footprint by becoming a more paperless office,” shares Lee. The Green Queen heavily promoted the eco-friendly angle during training to get people excited. She experienced very little resistance during this process; however, she did have to make concessions to help change people’s behavior.

“We had to wean some people off of printing forms since they were very familiar and comfortable with a hard-copy audit trail. So we customized a search in Process Manager that allowed users to go back and access these original forms at any point in time,” say Lee. “Once people got used to the electronic format, they love the benefits of using less paper—there is no need to make or store copies.”

Even though the staff has been using the New Business Intake process for less than a year, Lee is already reporting a significant decrease in its overall paper usage—adding to the firm’s endeavor to “go green” and reduce its hard costs. The automated process also reduces soft costs through single data entry and increased accuracy. The team is able to set up new clients and matters three to four times faster than the old, paper-based system.

“I can honestly say that expediting New Business Intake, getting matter numbers assigned quickly, and making conflicts more readily accessible allows our attorneys to focus more on their clients, not on paperwork,” says Lee.

Next up is automating the firm’s check request process, which is currently being tested with a pilot group and will be rolled out firm-wide this summer. Lee also has her sights on automating human resources processes, as well as potentially integrating Process Manager with other solutions, like records management and CRM.

Overall, Lee is thrilled with the investment in Process Manager, a leading-edge platform that will greatly contribute to streamlining many more of the firm's business processes. She is also excited to leverage these paperless processes as a competitive advantage. "We have encountered clients that only want to do business with environmentally conscious vendors, and I believe this trend will only continue," says Lee. Luckily, Kean Miller can claim the Green Queen on its staff.

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Vicki Lee

To learn more about Enterprise Process Manager or for a global list of office locations, visit elite.com.

