THOMSON REUTERS ELITE CASE STUDY

REED SMITH LLP

ENHANCING CORE LEGAL AND BUSINESS WORKFLOWS
WITH ENTERPRISE PROCESS MANAGER

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ENHANCING BUSINESS INTAKE PROCESS TO SUPPORT FIRM GROWTH

Reed Smith LLP, a global law firm specializing in corporate and commercial practices, is one of the 15 largest firms in the world. It has experienced tremendous growth over the past 10 years with the addition of new staff, new practice groups, new offices and, of course, new clients.

Management attributes a large part of this growth to the firm's commitment to deliver high-quality service and develop long-term client relationships. The BTI Consulting Group ranked Reed Smith among the top five firms for client service. The firm also established a state-of-the-industry Client Evaluation Program, which underscores the team's strategic focus on client satisfaction.

To maintain this high-level client satisfaction and effectively manage growth, management has invested in the firm's previous automated workflow processes. However, the firm's new business intake, a key process, was underperforming. "We had simply outgrown our previous workflow system," says Janice Mundy, Manager of Business Intake Processes and Information. "The process became too slow and cumbersome to keep up with the rate of new clients and matters coming in the door."

An increase in new business intake meant an increase in the amount and type of information required to properly evaluate new business and reduce risk exposure. An important step in this process is the interface with Enterprise Conflicts Manager™, a component of the Enterprise® Financial and Practice Management System, which Reed Smith had implemented in 2001.

When the time came for the firm to upgrade its existing system, Mundy and the IT team decided to conduct a new requirements analysis and evaluate other workflow solutions on the market. Along with Mundy, Senior Manager of Financial Systems Priyesh Shah and Financial Systems Analyst Keith Monteleone had very specific requirements for a new workflow platform based on their history:

1. **Performance.** The previous system was slow when trying to complete even simple functions, like opening and closing a business intake form (BIF).

2. **Shorter, more efficient processes.** The old BIF was cumbersome because additional fields were added based on practice groups or lawyer needs, and the system involved many manual selections and steps.

3. **Flexible development environment.** Making even small changes to the form or the process were either very difficult or required an outside consultant, which was costly and meant long turnaround times.

4. **Scalable**. The new platform had to easily grow and change with the firm.

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Priyesh Shah
Senior Manager of Financial Systems

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After an extensive evaluation, the team selected Enterprise Process Manager™ to help automate the firm's core legal and business processes. Process Manager was developed through a long-standing partnership with Thomson Reuters Elite and Metastorm® (now known as OpenText), the leading business process management solution provider. The solution combines the workflow expertise from Metastorm with Thomson Reuters Elite's extensive knowledge of the legal industry. "The references we received from other clients were fantastic. They emphasized how the integrated solution would empower our employees to respond quickly to new business opportunities and maintain high levels of client service," says Shah.

SHORTER, FASTER BUSINESS INTAKE

When analyzing the previous business intake process, Mundy found several areas where Process Manager could increase efficiencies. For example, anyone that wanted to add a new field to the BIF needed to send the request to Mundy, allowing her to ensure that any new information would add value to the process and for the firm as a whole. This kept the form to a reasonable length and the fields highly relevant for the benefit of all users.

In addition, the workflow in Process Manager was automated based on the information filled out in the form. Users do not make any decisions about where the form should go next, which prevents routing delays.

Finally, Process Manager was unquestionably faster. Before, Mundy's team spent hours staring at an all-too-familiar hourglass, waiting for the forms to launch, populate and close. The actions performed in the Process Manager portal are instant, which makes the entire process more efficient.

These factors helped make training easy; the team rolled out Process Manager to the firm in less than one month. "With Process Manager, we were able to immediately address the two biggest complaints about the old system— we needed a faster, shorter business intake process," explains Mundy.

ADVANCED TOOLS TO MANAGE THE PROCESS

The new system was easy for users to learn, because it primarily automated existing steps inside the enhanced user interface. Once the basic BIF information is completed, it is sent to Conflicts Manager where a report is generated and attached to the form. A conflicts lawyer reviews the report, provides concise analysis on the available form and sends it back to the originating secretary to fill out any remaining data.

In the quality review stage in which users verify the data, Monteleone created a checklist alongside the form as a reminder of items to review and validate. Users also have the ability to make notifications to the conflicts lawyers regarding any deficiencies in the data.

The BIF is then sent for final approval where it is automatically entered into Enterprise and a new matter number is generated. This stage also recognizes any contingent approvals and routes the BIF to the necessary parties. Mundy is able to maintain several conditional routing workflows in which different fields and paths are required based on location and type of matter.

To keep this information organized and easy to follow, Mundy and Monteleone rely heavily on Process Manager's intuitive graphical modeling tool that allows them to create and modify the visual representation of the business intake processes. "It is much easier to design workflows with the modeling tool," says Monteleone. "At first, we thought some changes would be a major development project, particularly with some of our complex conditional flows. But it was as simple as drawing another line on the workflow map."

Another advantage of Process Manager's graphical tools is the printable "BIF maps," which chart every workflow process. Mundy has posted hers up in her office. "It is a wonderful tool to answer questions users might have at any point in time. I can look at the map and tell them exactly what functionality they have at any stage without even opening the application."

THE IT ADVANTAGE

Although Reed Smith's previous workflow system featured robust capabilities, the developer environment was problematic. It was time consuming to make any form or process changes; querying the system was difficult; and it was hard to troubleshoot when anything went wrong. "Process Manager's database is very simple and easy to understand," says Monteleone. "A major advantage for us is the ability to easily determine the cause of any issue and quickly resolve it." Plus, Monteleone was able to completely customize the firm's BIF process without requiring a third party consultant for assistance. This allows the financial analyst staff to serve their internal clients and save money on consulting fees.

Shah is particularly pleased with the stability of Process Manager. "We regularly review a report that lists firm applications with the highest number of Help Desk requests. Process Manager has never made that list, which is in stark contrast to our previous system," says Shah.

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Manager of Business Intake Processes and Information

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UNDENIABLE RESULTS

Process Manager not only allows Mundy to monitor the status of pending BIFs to avoid any delays, but it also gives her the ability to generate reports that help identify potential bottlenecks or performance issues.

Overall, Mundy estimates that Process Manager cuts the time spent on these forms by 50 percent, and her team is able to open larger percentage of new matters in a shorter period of time. "We no longer waste time on manual processes. The routing flow is completely automated, which saves time and increases the accuracy of moving forms through the system," she continues. "The whole package has made a huge impact on our department. I would imagine Process Manager has made the same impact for the secretaries and other departments that touch the application as well."

Mundy and Monteleone are continuously enhancing the reporting feature to pinpoint where inefficiencies might exist in the process, such as tracking the amount of time BIFs spend at each stage and the percentage of time each role has in the overall process. "Detailed reporting helps us identify any problems in the process and reveal where it is operating on optimum level, which is helpful for future workflow processes," says Mundy.

GROWING WITH FIRM NEEDS

Now that Reed Smith has successfully reengineered the business intake process, the team is on to the next project. The new check request workflow has already been introduced to the London office and will also integrate directly with Enterprise. Additionally, Shah and his team are planning to use Process Manager to map the firm's new employee orientation and to track the status of internal IT projects. He has no doubt Process Manager will continue to serve the needs of the firm now and in the future.

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

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