

## CONFLICTS PROCESS REVIEW

EXPEDITE NEW BUSINESS INTAKE BY STREAMLINING THE CONFLICTS REVIEW PROCESS. MAXIMIZE YOUR INVESTMENT IN ELITE CONFLICTS MANAGER TO DECREASE RISK AND INCREASE DEPARTMENTAL EFFICIENCY.



An effective conflicts management department must combine in-depth analysis and research with artful presentation to expedite client intake, while at the same time avoiding unnecessary risk. It is important for the firm to stay informed of innovations in the industry, along with technology that will help the conflicts department operate more efficiently. The Conflicts Process Review can serve as a health check, or the first step toward complete optimization. Elite® consultants can help ensure that the firm is taking full advantage of the powerful features and flexibility that accompany an Elite software investment.

### LOWER FIRM RISK AND AUTOMATE REPETITIVE TASKS

The Elite Practice Management Services team identifies areas of process inefficiency and work redundancy while also uncovering potential risks to the firm. On-site efforts allow consultants to observe the operating environment and make substantive recommendations for improved use of Elite Conflicts Manager. Industry best practices, tools and techniques are offered to automate repetitive tasks, eliminate processes that do not provide value and minimize the firm's exposure to risk. The goal is to enable the department to operate in a low-risk, optimized environment while fully leveraging its investment in Conflicts Manager.

### CONFLICTS REVIEW PROCESS

An Elite consultant conducts a meeting to discuss the firm's business requirements and departmental objectives for the review. The firm completes a background questionnaire and provides copies of policies, procedures, forms and other available documentation. During the on-site visit, the process consultant conducts individual and functional group interviews and observes daily processes and staff use of Conflicts Manager.

Elite consultants present the firm with a report that contains recommendations on Conflicts Manager configuration and usage along with other opportunities for process automation. Follow-up conference calls are set up to discuss recommendations and next steps provided in the final report. After completion of the overall project, Elite consultants review the measures implemented and provide documented assessments regarding the validity and success of the changes.

#### QUICK FACTS

- Minimize the possibility of working for currently adverse parties
- Streamline conflicts and new matter intake processes
- Identify additional process automation opportunities
- Fixed-fee engagement

#### OVER 40 YEARS OF PROVEN CONSULTING LEADERSHIP AND CLIENT SUCCESS

Our team of talented advisors is comprised of MBAs, CPAs, former firm CFOs and executive directors, and offers decades of experience working with some of the largest professional services firms in the world. We utilize a variety of methods consistent with the Balanced Scorecard system, Six Sigma, and those outlined in the American Institute of Certified Public Accountants' Practice Aid Series.

For more information about Conflicts Process Review, contact your account manager or visit [www.elite.com](http://www.elite.com).

