THOMSON REUTERS ELITE CASE STUDY

MORRISON & FOERSTER LLP

MAINTAINING SUPERIOR SERVICE WITH
ENTERPRISE PROCESS MANAGER

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THE CHALLENGE

With more than 1,000 lawyers plus related support staff located at 19 offices worldwide, the law firm of Morrison & Foerster LLP (MoFo) processes an enormous amount of data and documents each month in order to service clients efficiently and manage the overall business of the firm. While all of this information serves a purpose, the logistics associated with processing client information, documents, and administrative forms can be overwhelming. It didn't take long for MoFo's management team to realize that as the firm continued to grow, changes would be needed to improve productivity and maintain the superior level of client service for which MoFo is known.

PROCESS HURDLES IMPEDE NEW BUSINESS DEVELOPMENT EFFORTS

Take, for example, the procedures associated with bringing on new client business. At MoFo, the process includes a search for potential conflicts of interest as well as approval by the firm's Business Review Committee. Participation is needed from both administrative personnel as well as various levels of management staff within multiple departments. Until recently, the task was best characterized as a complicated manual process that began when a secretary filled out a Conflicts Information Form at the request of one of the firm's lawyers. This paper document was sent via interoffice mail or faxed to the New Business Center where a potential conflicts review was conducted. The resulting conflicts report was then faxed or delivered to the originating secretary, who would pass it back to the lawyer, who typically checked with other lawyers regarding potential conflicts. After getting clearance for any potential conflicts, the secretary would complete yet another form—the New Business Memo—tuck it into yet another inter-office envelope, and begin a new paper chase. Gauging how long the process would take was heavily influenced by couriers and fax machines. Identifying where in the cycle the information request might be was virtually impossible.

Just describing this single process is exhausting. It became very apparent that making simple changes to the way processes were managed could reap great rewards, which was when MoFo made the decision to implement a business process management (BPM) solution that would integrate their people, data, and enterprise applications to create more efficient, adaptable, and automated processes.

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THE SOLUTION

As the implementation process began, MoFo began to refine their requirements for an optimal solution. While the firm had well-defined procedures for new business intake and conflicts identification, many activities included a mix of automated and manual processes. The selection of the Enterprise Process Manager™ solution using Metastorm® (now known as OpenText) e-Work enabled MoFo to efficiently manage their new business intake process in an auditable environment for enhanced productivity and collaboration across the firm. MoFo is one of more than 800 professional services firms that have implemented the Enterprise® solution for professional services practice management. Thomson Reuters Elite, a global leader in financial and practice management software solutions for professional services organizations, has a strategic partnership with Metastorm, a market-leading developer of BPM technology. This partnership allows firms to benefit from Thomson Reuters Elite's extensive domain knowledge and understanding of professional services management best practices and Metastorm's expertise in BPM.

DEFINING THE SCOPE AND APPROACH

When embarking upon this type of implementation, organizations must first define the scope of the project and set expectations for anticipated results. To this end, MoFo decided to begin by automating the processes associated with a single area of the practice—new business intake and conflicts identification. With the BPM tool selected and the scope defined, the next step was to review MoFo's business-process map and identify adjustments that would enhance efficiency and make the best use of technology. Once this effort was completed, the team was able to customize the solution to meet the firm's unique needs. After the basic new business process was automated, a new phase of the effort successfully linked the conflicts approval system with other Enterprise applications. The solution was initially rolled out to a single office during the pilot phase and, upon completion of extensive user testing and acceptance, was subsequently rolled out firm-wide.

THE RESULTS

Today, the new business intake and conflicts verification process still involves a number of people and departments, but it is far from the paper-intensive process that it used to be. Forms are filled out online, folders and documents are routed electronically for review and approval, alerts and escalation features ensure that work is completed on schedule, and requests move efficiently from one department to the next. The solution is integrated with other Enterprise applications so that client and matter information is updated as the process unfolds. And, thanks to the Watch List feature provided by the Enterprise Process Manager solution, any authorized user has access to real- time status information about activities in progress, a feature that has cut down on the number of status inquiries at the new business center and empowers secretaries to monitor their lawyers' conflict resolution processing.

The selection of the Enterprise Process Manager solution using Metastorm e-Work enabled MoFo to efficiently manage their new business intake process in an auditable environment for enhanced productivity and collaboration across the firm.

MISSION ACCOMPLISHED: EFFICIENT, ADAPTABLE, AND AUTOMATED PROCESSES

The new process also provides an audit trail that delivers a number of benefits, including the ability to document the due diligence that takes place before signing a new client or taking on a new matter for an existing client.

And, as would be expected, the switch to a BPM-based solution has improved efficiency, due in part to the increased speed associated with electronic delivery, as well as the reduced data entry and re-work efforts that have resulted from the enhanced quality of information gathered and the elimination of human error that is associated with handwritten forms and verbal requests. Courier and fax costs have been reduced. All in all, procedures that used to take between three and five days can now be accomplished in as little as 24 hours. And in a business where time literally is money, increased efficiency is a very good thing indeed.

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

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