

McMillan

Migrating conflicts processes and data from Elite 3E to Intapp Open

Establishing compliant, efficient, and accurate intake and conflicts processes with minimal disruption and cost



Project Summary

Name: McMillan LLP

Headquarters: Toronto, Ontario

Lawyers: More than 350 lawyers

Website: www.mcmillan.ca

Services: Corporate law concentrating on the energy, oil and gas, mining, media and entertainment, automotive, health care, and transportation sectors from offices in Vancouver, Calgary, Toronto, Ottawa, Montréal, and Hong Kong

Business Situation

- Migrate and integrate conflicts processes and data from the Elite 3E platform to Intapp Open
- Implement industry best practices

Technical Situation

- Upgrade to the latest version of Intapp Open and implement the entire suite for intake and conflicts
- Minimise disruption to front-office personnel, keep costs low, and provide ongoing support

Why Wilson

- Certified expertise with both Intapp Open and Elite 3E
- Prior experience at firm and track record as a trusted advisor and collaborative technology services partner
- Full-service capability to manage project, provide subject matter expertise, train and offer technical assistance on conversion, workflow, integrations, and report development

Project Overview

- Convert data from 3E to Intapp Open and within Intapp environment
- Recommend and perform form and workflow changes
- Establish compliant, efficient, and accurate intake and conflicts processes
- Develop conflicts research report
- Provide end-user training and user acceptance testing of both the data and the process

Highlights

- Successful rollout over a weekend with minimal production impact and zero issues
- Delivered project on time and within budget
- Ongoing improvement in the pace of new business intake while advancing the process, improving search performance, and staying compliant



With recognised expertise and acknowledged leadership in major business sectors, McMillan serves public, private, and not-for-profit clients across key industries in Canada, the United States, and internationally. The firm’s values – respect, teamwork, commitment, client service, and professional excellence – are at the heart of McMillan’s service to its clients, local communities, and the legal profession.

When seeking a professional services provider to support an upcoming Intapp Open project, it sought a partner that demonstrated some of these same values.

McMillan was looking to migrate its conflict management processes from the Elite 3E platform to Intapp Open. The firm had already implemented Intapp Walls and Intapp Integrate and was using Intapp Open for new business intake. It wanted to upgrade to the latest version of Intapp Open, use it for both intake and conflicts, and implement industry best practices across the enterprise with minimal disruption to front-office personnel.

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Outlining the project objectives

McMillan Senior Project Manager James Walker was responsible for all aspects of the project from inception to completion, including the identification of a services partner to support the effort. He explains, "We sought a provider with ample experience in both 3E and Intapp Open because of the technical nature of our project."

By removing the conflicts processes from 3E, McMillan hoped to enhance performance and reduce its 3E footprint to simplify ongoing maintenance and upgrades. But it also wanted to speed search time when running conflicts reports. "With some of our large entities, for a banking institution for example, we would have to break up the conflict search into four pieces, and then reattach them as one report. Large entity searches could take up to 30 minutes," Walker adds.

McMillan's goal was to have a unified intake and conflicts process in Intapp Open, which would enable additional capabilities. "Intapp Open offers advanced search algorithms with rich, relationship-focused data reporting. It also offers sophisticated business rules for filtering preferences, enabling quick creation of our reports, and it can flag and rank results based on relevance to the firm," Walker says. "By integrating conflicts with intake, we would establish an audit trail for every step of the approval process, complete with an attached conflict search report."

“ Wilson is highly proficient in Elite and Intapp software. The expertise and skill level of their technology professionals really cuts down on project hours and cost. ”

James Walker | Senior Project Manager, McMillan

Because McMillan was already live on Intapp Open, the data conversion process posed some challenges. "Most firms implement conflicts and intake as one module. Ours were separate. This made the data conversion more difficult because we had already synced client matter data. Some tables already had data in certain fields, so it wasn't a clean transfer. We had to overwrite or merge some data," Walker explains.

Selecting the top services provider

McMillan embarked upon a robust vendor selection process. It established selection criteria and ranked service providers by ability. Of the three providers shortlisted for consideration, the team at Wilson Allen surpassed the rest. It earned the highest score in 10 areas of consideration.

"Our biggest reason for choosing Wilson was because of its knowledge and expertise on the 3E platform. In the past, we trusted vendors too freely when they said they had 3E experience. Saying that you have 3E experience is one thing compared to a company like Wilson that specialises in 3E, performs implementations, and engages in multiple projects over time," Walker notes.

Wilson Allen's status as a certified services partner for Intapp products was also a plus. "Wilson is highly proficient in Elite and Intapp software. The expertise and skill level of their technology professionals really cuts down on project hours and cost," Walker adds. "We didn't want to have to pay our service partners to learn how to use the software while working on our project."

Beyond technical expertise, McMillan's comfort level with Wilson Allen was high. "We've been working with the people at Wilson for the last three years and everything has been fantastic. They were the easiest to work with when constructing a statement of work for this project. Plus, their approach to the project, its methodology and project management, were most similar to ours, which elevated them over other vendors," Walker says.

“ The conflicts subject matter expert Wilson assigned to the project team was phenomenal in terms of risk management best practices. The conflicts report the team redesigned has been extremely well received by our lawyers. ”

James Walker | Senior Project Manager, McMillan

Adhering to a tight timeline

Wilson Allen appointed four people to the project, which was run on a tight timeline of three months. The team worked with personnel from McMillan to migrate the firm's conflicts process from Elite 3E to Intapp Open.

Specifically, the team focused on the conversion of data, recommending and performing form and workflow changes, developing a conflicts search report, and performing end-user training and user acceptance testing of both the data and the process. The project followed Agile methodologies and was completed on time and within budget.

Initially, McMillan was not going to make any modifications to its conflicts processes. But after working with the conflicts subject matter expert that Wilson Allen assigned to the project, they decided to redesign for greater efficiency.

“Originally, I didn't think the position would add very much value. But the conflicts subject matter expert Wilson Allen assigned to the project team was phenomenal in terms of risk management best practices,” Walker says. “The conflicts report the team redesigned has been extremely well received by our lawyers.”

Reaping the rewards of Intapp Open

McMillan has had zero issues or problems following the completion of the project. It has improved data accuracy and streamlined its intake and conflicts processes. By migrating conflicts out of 3E, performance for that system has improved and leaves McMillan with a smaller footprint to maintain.

With Intapp Open, McMillan is realising many other benefits as well. Running conflicts reports has been reduced from up to 30 minutes to three seconds for all reports, which significantly improves productivity when considering that McMillan typically runs 40 to 50 reports each day.

McMillan's conflicts team no longer has to use advanced search strings. The software has automated intelligence and conditioning that minimises human errors. Analysis of conflicts and related parties is also better due to stronger ranking and rules for enhanced conflict management. Performing research for lateral hires is also more efficient.

Helping to make all of these benefits possible through a successful project implementation was Wilson Allen, a services partner McMillan believes can provide ongoing value. “Overall, we felt that Wilson was extremely professional,” Walker says. “We have several Intapp and Elite projects coming up. Wilson will be the first company we call.”