



Mintz

Simplifying the Transition to 3E with Wilson Allen Consulting Services and Intapp Integrate



How careful planning, choosing the right team, and a solid data strategy add value to operations and lower implementation and maintenance costs



Project Summary

Name: Mintz, Levin, Cohn, Ferris, Glovsky and Popeo, P.C.

Headquarters: Boston, Mass.

Lawyers: More than 500 lawyers

Website: www.mintz.com

Services: Am Law 100 general practice, full-service law firm with core practice areas including transactional, intellectual property, litigation and investigations, and regulatory and advisory

Technical Objectives

- Implement 3E practice management software, converting from Elite Enterprise
- Transition conflict management to Intapp Conflicts
- Implement standard 3E functionality and only customise firm-specific data requirements, operational reports, invoice formats, and notifications

Business Objectives

- Complete the project within the timeline and within or under budget
- Change the firm's business processes as necessary to align with 3E functionality and industry best practices
- Ensure month-end process is seamless and completed in a few hours
- Roll out 3E beyond finance, billing, conflicts, and records through dashboards

Why Wilson Allen

- Proven application and technical expertise
- Long-term relationship with Mintz
- Data validation and conversion expertise
- Certified services partner for Intapp and Elite

Project Overview

- Supplemental internal project management
- Application subject-matter expert assistance
- Data validation assistance
- Custom report development
- Custom Intapp data integration services

Highlights

- Delivered on time and within budget
- Ease of data conversion
- Collaborative effort among Mintz, Elite, and Wilson Allen team members
- Improved data access and ability to deliver trusted information to business users

A Boston institution since 1933, Mintz, Levin, Cohn, Ferris, Glovsky and Popeo (“Mintz”), applies industry and subject-matter expertise to solve business problems for thousands of organisations and individuals. The firm’s more than 500 attorneys work to help clients navigate the ever-shifting landscapes of business and industry – solving real-world problems and creating real-world potential.

To help the firm run its business operations, Mintz had been using Elite Enterprise business management software and related systems beginning in 1993. After learning of the planned sunsetting of the software, the firm performed an extensive market search and decided to make the transition to the 3E platform. The firm was strategic with the timing of its implementation of 3E, as Brian Mantarian, Chief Financial Officer at Mintz explains. “We wanted to pursue our implementation in a controlled manner before the majority of other firms running Enterprise decided to transition to a new software system,” Mantarian says. “We wanted there to be enough firms who had already made the transition to 3E to learn from them. But we didn’t want to wait so long that there would be a shortage of available resources to support our transition.”

Mintz’s plan worked. It was able to get the support it needed and proceed at a comfortable pace to accommodate the day-to-day responsibilities of firm members who were involved in the implementation.

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Brian Mantarian, Chief Financial Officer, Mintz

Assembling a high-performing implementation team

One of the firm’s biggest goals for the implementation was to complete the project as easily and seamlessly as possible. To achieve this goal, Mintz believed it was critical to have the right team in place.

“Mintz selected Elite to lead the overall software implementation but was looking for additional support for its internal project team,” says Rob Beisswenger, Wilson Allen’s senior director of professional services. “They wanted to engage a service provider with application subject-matter expertise but also experience with data validation, custom report development, and custom Intapp data integration services.”

Mintz interviewed different service providers but ultimately selected Wilson Allen. The firm arrived at this decision based on its past experiences with Wilson Allen and the caliber of its people. Mintz began working with Wilson Allen when it first implemented Enterprise in 1993 and has engaged Wilson Allen for various services each year ever since.

When it came time to choose a partner to support the implementation, Wilson Allen was a natural choice. “Wilson has the right people with the right skills. They know the software, they know how our firm operates, and they know what needs to be done to solve a problem,” Mantarian adds.

Getting ready with a Phase Zero Workshop

To help the firm prepare for its 3E project, Mintz engaged Wilson Allen for a Phase Zero Planning Workshop. “Our directors who specialise in 3E implementations led the workshop,” Beisswenger explains. “Going through this process enabled Mintz to fully articulate the project scope and objectives.” Mintz was able to determine a potential budget, identify the team structure, prepare risk mitigation strategies, and establish a change management plan.

As part of this workshop, Wilson Allen developed a data integration strategy to prepare the firm's data for migration to 3E. Wilson Allen's consulting services team worked on assessing the data quality, cleaning up the source data, and preparing the data for conversion, migration, validation, and balancing. This full suite of data services helped to ensure a clean and complete data conversion from Enterprise to 3E.

Deploying a solid data strategy

Wilson Allen reviewed the firm's overall data integration requirements and helped the firm design and build a master data repository for its Enterprise system. This repository was built with the migration to 3E in mind.

"We validated the various systems that tie into 3E, such as its new business intake system, its disbursement systems, and other third-party applications from this master data source," explains Shishir Shetty, VP, Technology Services, Wilson Allen. "When the firm switched to 3E, the source to the master data was changed without much impact on the downstream systems." Wilson Allen also made use of Intapp Integrate to handle the data loads into 3E as well.

The conversion of data from Enterprise to 3E and the quality of the migrated data was a key area of focus. Debbie Mills, Wilson Allen's senior director of financial data governance led the effort. "Our team worked to effectively scrub, prep, convert, and validate the data," she explains. "Each cycle of conversion improved both the speed and accuracy of the migration process leading to a successful and less-disruptive go live."



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Brian Mantarian, Chief Financial Officer, Mintz

“Wilson really helped simplify the data conversion process for us. There were a couple of people at Wilson who were essential in helping us do that. They had been through a number of conversions and were able to quickly run a script to identify potential issues. It’s pretty amazing what they were able to do,” Mantarian adds.

Mintz took advantage of a full complement of Wilson Allen services to support its 3E implementation. These services included project management, data management, data integration, and the customisation of templates and reports for 3E and Wilson Ideate software.

Why it went so well

Mintz approached the implementation in a deliberate manner rather than rush through the project scope. Its methodical approach and careful planning resulted in a go-live that was on time, within budget, and enabled a seamless transition from Enterprise to 3E. Mantarian attributes the success of the project to the implementation team.

“I think the biggest reason our project went so smoothly is due to the collective strength of our team members from Mintz, Elite, and Wilson. We used to call it the dream team,” Mantarian explains. “We had five or six people on the team who were involved with the original implementation of Enterprise 25 years ago. That knowledge enabled us to make decisions quickly and with confidence. Plus, the Wilson folks really know all there is to know about the technical aspects of the implementation, and that really helped steer us in the right direction throughout the project.”

As a best practice, Mintz tries to stick to standard functionality as much as possible. It took this approach with its Enterprise implementation years ago and adhered to this mindset with its 3E implementation as well. This discipline helped simplify the project and streamline the effort. The fact that Mintz hadn’t been through any mergers requiring the conversion of different practice management systems helped keep the firm’s data relatively pure. This also helped reduce the complexity of the project and ease the transition.

Beisswenger believes one of the most important factors for a successful implementation is to do your homework up front. He suggests listing your objectives to make sure they fit within your budget and your timeline. “Make sure your scope is sound, that you’re replacing all the software you need to replace, and that you’ve got a solid platform moving forward,” Beisswenger adds. “Do all of this right up front and then put together the strongest implementation team possible. Those are all critical success factors for large-scale software implementations.”

Looking ahead

Now that 3E is running smoothly, the firm is looking at ways to use tools to make the system more efficient. It’s replacing Redwood Business Intelligence with Wilson Ideate software to provide better information to its attorneys. It is also looking into software to help the firm streamline its billing processes.