

# Munger Tolles

## Implementing Intapp Intake and Conflicts in a 3E Environment

For more than 55 years, Munger, Tolles & Olson has developed and implemented strategies to obtain the best results for its clients. Its principal areas of practice include litigation, corporate, labor and employment, environmental, real estate, financial restructuring, and tax. With more than 200 attorneys and a national and international presence, the firm provides counsel on some of the most high-profile and complex legal cases in the United States.

Complex legal cases often go hand in hand with complex conflicts and intake processes. To manage these processes, Munger Tolles was running a self-built, customized Autonomy Process Automation solution. However, since the firm was preparing to implement the 3E enterprise business management solution by Thomson Reuters Elite, it needed to replace its custom solution with software that would more readily integrate with 3E. The firm embarked on a request for proposal to see what was available to meet its needs and align its conflicts and intake processes with best practices and industry standards.

"We have highly regarded attorneys who do challenging work for many of the same clients served by much larger firms. We needed a flexible conflicts and intake platform to match the rigorous review processes of much larger firms. But we also wanted to serve our internal clients, our partners, better," says Kevin-William Hughes, senior manager of conflicts and records at Munger Tolles. "After our internal vetting process and discussion with key stakeholders, we decided that Intapp was the best option for us for conflicts and intake."

### Choosing Intapp Conflicts and Intake

Where other law firms have specific conflicts attorneys to handle ethics issues, at Munger Tolles, conflicts analysts perform most of the research. Intapp Conflicts offered the functionality the firm sought to streamline its conflict-checking processes and do as much analysis as possible for the attorneys, as Jonathan Silva, conflicts system administrator, explains.

"Intapp Conflicts was the most robust and impressive solution we reviewed. Its database structure for conflicts searches, its ability to recall that information, and having everything centralized in one location – those features were superior in terms of intake. We also liked the flexibility and ease of making changes to the intake workflow ourselves, rather than having to rely on an outside consultant," Silva says.

The firm also liked the mobile functionality available with the Intapp platform. "Having a stand-alone application that we can roll out and be able to do things on the go is important in today's environment," Silva explains.



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### **Why Wilson Allen for Intapp implementation services**

Munger Tolles wanted to ensure its implementation timeline and project outcome, so it turned to Wilson Allen to support the project. Wilson Allen is a leading certified Intapp partner with deep domain expertise in the full Intapp platform and Elite 3E. These combined skills gave Munger Tolles peace of mind that Wilson Allen would deliver their project effectively and efficiently to ensure a successful and positive outcome.

“We were on a very tight timeline,” Hughes explains. “Our CFO wanted to make sure our rollout of Conflicts and Intake did not in any way impede or hinder our 3E project. We felt having Wilson Allen support two very high-profile projects at the firm would result in better communication to streamline and eliminate any issues that could arise as we got closer to the go-live. That was essential given our complex and compressed timeline.”

### **Tackling back-to-back go-lives**

To allow ample time to adapt to new intake and conflicts processes, Munger Tolles chose to go live in phases, thus maximizing the firm’s return on investment while aligning with an ethos of continuous improvement. In October 2019, the firm deployed Conflicts in its Elite Enterprise environment. In Q1 2020, it quickly progressed to

Intake, which included attorney email notifications and approvals and mobile capabilities for increased availability and efficiency. It finally transitioned with both Intake and Conflicts in Q3 2020 with a seamless migration to Elite 3E as the software went live.

Wilson Allen’s expertise in both Intapp and Elite software and countless combination projects allowed the firm to progress to its goals without undertaking significant reengineering to migrate practice management systems. Wilson Allen’s unique approach to conflicts data migrations for firms moving between Enterprise and 3E ensured that Munger Tolles didn’t waste time duplicating effort. It also allowed the firm to focus on the business change and software use elements to empower users to get the most from the application.



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**Kevin-William Hughes**  
**Senior Manager of Conflicts and Records**  
**Munger Tolles**



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**Jonathan Silva  
Conflicts System Administrator  
Munger Tolles**



### **Streamlining the project using proven methodology**

Other critical elements of the project's success are attributable to the out-of-the-box model office approach Wilson Allen has for Intake forms and workflow. A significant time-saver in project implementations, this approach allowed Munger Tolles to quickly understand the benefits of the Intapp solution and make more informed decisions of what would or wouldn't work for its business. Once the forms and workflow were baselined, Munger Tolles made use of Wilson Allen's agile, iterative methodology to increase the value of the final features the firm would make use of in its deployment.

Wilson Allen consultants also complemented the firm's ability to collect and annotate conflicts data with a custom SSRS report, which helps attorneys visualize conflicts by organizing and presenting data in logical sections for accurate and rapid decision making. This solution also leveraged an out-of-the-box report from Wilson Allen's asset library to jumpstart the framework for making firm-based changes.

### **Applying domain expertise to add value**

Munger Tolles felt that Wilson Allen's services team was particularly helpful throughout the project. "Our Wilson Allen resources were very knowledgeable, particularly about the use of Intapp Integrate to manage data communications across our software systems," Silva explains. "Also, our project manager was always available to jump in and provide assistance, which was particularly helpful."

While each go-live was a success, in hindsight, Silva would recommend concentrating on a new software environment rather than getting the software running in a system that is about to be retired. "We essentially had three go-lives in a short period," says Silva. "It was very resource-intensive, which Wilson Allen helped us to break into manageable pieces. But we essentially had to build datasets in Enterprise and again in 3E. We thought that would be the better option, but instead, we could have had our conflicts team manually perform the conflicts research while we were switching over to 3E."



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**Kevin-William Hughes, Senior Manager of Conflicts and Records, Munger Tolles**

### **Establishing industry best-practice business processes**

On a day-to-day basis, the conflicts research Munger Tolles’ conflicts team performs and prepares is comprehensive. The report it produces not only identifies potential conflicts issues. It also tracks and documents how the conflicts were addressed as part of the matter-opening process.

“The system produces a lot of information that we then parse through. What we’re able to provide to our attorneys is much better than before. We’re able to give more direct answers, and we’re also able to provide more direction on what the attorneys need to do next to resolve a conflict,” Silva says.

The system consolidates all conflicts information in a central location. This visibility is a plus for Munger Tolles’ attorneys and its external clients as well. “My primary goal in implementing a robust platform was to instill confidence in our team’s ability to provide accurate and timely information, but also that our database is up to date and correct,” Hughes explains. “We also wanted to be able to demonstrate to our clients without any doubt that we follow proper risk mitigation protocols.”

### **Plans for future improvement**

The firm’s conflicts team is now working to build its proficiency with its Intapp platform to maximize efficiency and productivity. But since Munger Tolles has recently undergone many changes, it plans to solicit feedback before taking the next steps with additional software projects. It will survey its attorneys to get feedback about what’s working well and where they would like to see further improvements.

Freeing attorneys to concentrate on clients is top of mind, as Hughes explains. “Ultimately, we want to make sure the platform remains flexible for our attorneys. We want to provide service in a way that alleviates as much of the administrative burden as possible so they can concentrate on client matters.”

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