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Migrating conflicts processes and data with complete accuracy and minimal disruption


When seeking a professional services provider to support an upcoming Intapp project, Toronto-headquartered law firm McMillan sought one that demonstrated its values of respect, teamwork and a relentless commitment to client service. It selected Wilson Allen, drawing on their expertise in legal software, process design and integration to help migrate its conflict management processes from the Elite 3E platform to Intapp Open.

McMillan 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.

Unifying data and accelerating search

James Walker, Senior Project Manager, McMillan, says by removing the conflicts processes from 3E, the firm hoped to enhance performance and reduce its 3E footprint to simplify ongoing maintenance and upgrades. But it also wanted to speed up search time when running conflicts reports.

“With some of our large entities, we would have to break up the conflict search in 3E into four pieces and then reattach them as one report. Large entity searches could take up to 30 minutes.”

A photograph showing a group of business professionals in a meeting. A woman with blonde hair and glasses is seated at a white table, looking towards another person. A laptop is open in front of her. Other people are visible in the background, some with their backs to the camera.

“The subject matter expert Wilson Allen assigned to the project team was phenomenal in risk management best practices.”

James Walker, Senior Project Manager, McMillan

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. 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.”

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. It wasn’t a clean transfer,” Walker explains.

Choosing the best 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, Wilson Allen surpassed the rest.

“Our biggest reason for choosing Wilson Allen was its knowledge and expertise on the 3E platform. They are experts in 3E, have performed implementations, and engaged in multiple projects over time,” says Walker.

Beyond technical expertise, McMillan’s comfort level with Wilson Allen was high. “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,” says Walker.

Value-added expertise

Wilson Allen appointed four people to the project, run on a tight timeline of three months.[]The project was completed on time and within budget.

Initially, McMillan was not going to modify 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.

“The conflicts subject matter expert was phenomenal in risk management best practices,” Walker says. “The conflicts report the team redesigned has been extremely well received by our lawyers.”

“Wilson Allen is highly proficient in legal software. The expertise of their professionals really cuts down on project hours and cost.”

James Walker, Senior Project Manager, McMillan

Reaping the rewards

McMillan 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.

Walker says running conflicts reports has been reduced from 30 minutes to three seconds for all reports, significantly improving productivity. “In addition, our conflicts team no longer has to use advanced search strings. The software has automated intelligence and conditioning that minimizes human errors.”

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

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McMillan serves public, private, and not-for-profit clients across key industries in Canada, the United States, and internationally with recognized expertise and acknowledged leadership in major business sectors. 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 legal professionals.

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