

## CASE STUDY

The logo for Munger Tolles & Olson LLP, consisting of the firm name in white text on a red square background.

# Keeping project outcomes on track during back-to-back legal technology implementations

Before implementing Elite 3E, US law firm Munger Tolles decided to replace its self-built process automation software with Intapp's Conflicts and Intake solution. It asked legal technology experts, Wilson Allen, to help manage the complex and interdependent implementations.

"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 on Intapp applications as the best option."

## Why Wilson Allen?

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 certified Intapp partner with deep domain expertise in the Intapp platform and Elite 3E. These joint skills gave Munger Tolles peace of mind that Wilson Allen would deliver their project effectively and efficiently to ensure a successful and positive outcome.

A photograph showing three people in a meeting. A woman in the center is smiling and looking towards the right. A man on the right is partially visible, looking towards the center. A woman on the left is partially visible, looking towards the center. They are sitting around a table with papers and glasses.

**Kevin-William Hughes**

Senior Manager of Conflicts and Records, Munger Tolles

"We were on a very tight timeline," Hughes explains. "Our CFO wanted to make sure our rollout of Conflicts and Intake did not impede or hinder our 3E project. We felt that having Wilson Allen support two very high-profile projects at the firm would result in better communication 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 consecutive 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. The firm first deployed Conflicts in its Elite Enterprise environment, then quickly progressed to Intake. It finally transitioned Intake and Conflicts with a seamless migration to Elite 3E as the software went live.

Wilson Allen's expertise allowed the firm to migrate from the old to the new practice management system without significant reengineering.

## Streamlining the project using proven methods

Wilson Allen's model-office approach was critical to other elements of the project's success. This method allowed Munger Tolles to quickly understand the benefits of the Intapp solution and make more informed decisions about what would or wouldn't work for its business.

Wilson Allen consultants also improved the firm's ability to collect and annotate conflicts data with custom reports, helping attorneys visualize conflicts by organizing and presenting data in logical sections for accurate and rapid decision-making. This solution also leveraged elements from Wilson Allen's asset library to jumpstart the development framework.

Jonathan Silva, Conflicts System Administrator, Munger Tolles says Wilson Allen's services team was helpful throughout the project. "They were very knowledgeable, particularly about managing data communications across our software systems. Also, the Wilson Allen project manager was always available to jump in and assist, which was particularly helpful."

While each go-live was a success, in hindsight, Silva would recommend concentrating on a new software

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environment rather than getting the software running in a system that is about to be retired. "We essentially had three go-lives in a brief period," says Silva. "The program was very resource-intensive, which Wilson Allen helped us break into manageable pieces."

## Plans for future improvement

The firm's conflicts team is now working to build proficiency with its Intapp platform to maximize efficiency and productivity.

"Ultimately, we want to ensure the platform remains flexible for our attorneys," explains Hughes. "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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