

Law firm uses TAP Workflow Automation to Optimize New Work Intake

Summary

The CIO of a boutique litigation powerhouse, seeking to optimize delivery of services to clients, turned to improvement of legal processes. Instead of custom app development, he took the advice of a leader of CLOC* and tried the TAP Automation Platform to standardize New Work Intake. In one week, and without developer involvement or displacing existing software, the CIO interviewed all stakeholders and completed this work-flow to support clients' legal ecosystems.

*The Corporate Legal Operations Consortium (CLOC) helps legal professionals optimize their legal service delivery models. CLOC's leadership has directly applied workflow automation to key legal processes at major corporations.

**KEESAL
YOUNG
&
LOGAN**

CLOC Recommends Workflow Automation for Legal Ops

Justin Hectus is CIO and a 20-year veteran of Keesal, Young & Logan (KYL), a litigation firm serving Fortune 500 businesses in the banking, technology, healthcare, marine and energy industries. Hectus mentioned to CLOC CEO Connie Brenton, who is also Chief of Staff and Senior Director of Legal Operations at NetApp, that he planned to assign developers to program a legal workflow. She encouraged him to instead try the TAP Automation Platform, a quickly-deployable workflow environment that meets security and compliance requirements while supporting collaboration and Web access – and adapts to virtually any legal process.

“ Today, clients want more than just great lawyering. They expect their outside counsel to invest in the tools of technology to support efficiency, quality and consistency.”

JUSTIN HECTUS

CIO & CISO Keesal, Young & Logan



Needed for the Legal Ecosystem: Efficient Processes & Secure Collaboration

Most enterprises navigate an ongoing stream of legal matters, including litigation. Their legal departments need maximum efficiency to complete key processes and reduce cost and risk. Much corporate legal work today is disaggregated and spread across multiple outside firms. Handling it efficiently requires smooth interactions in every step of the way in the legal ecosystem. One key juncture is the intake of new work assignments at law firms, and CIO Hectus selected this crucial process as a pilot TAP project.

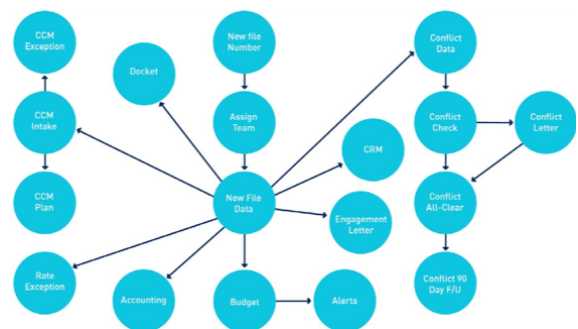
A Law Firm’s First Week with Workflow Automation

When Brenton explained to Hectus how her group at NetApp had built a highly effective workflow in TAP for assigning legal work to outside counsel, he decided to build “the sequel” to that process, and began by interviewing stakeholders in New Work Intake.

Rapid Implementation Automation Despite Many Stakeholders

In one week, Hectus completed interviews and mapped out the steps and approval touchpoints of New Work Intake in TAP, creating almost the entire new workflow. “I spent a couple of hours per day on it, for several days,” he explains, “and obtained help (from the TAP team) for only the final 20 percent. By contrast, it typically takes several months to develop one single-purpose app using traditional programming methods or other applications.”

Hectus compared building a workflow in TAP to creating a mockup on a graphics program. “When you place a new element on-screen in TAP, the workflow is immediately programmed on the back end. It’s real-time and very robust.”





Unintended Positive Consequences

1. Workflow Automation Spurs Process Improvement

As Hectus found, a workflow is not finished the first time it is mapped out, and this has unexpected benefits. “When stakeholders see their process graphically in TAP, it can trigger breakthrough realizations of how the process can operate more efficiently. That allows interaction on the spot to revise and improve the workflow.”

“Workflow Automation is well suited to coordinating and driving a multi-participant process.”

2. Replacing Single-Purpose Programmed Legal Apps

Law firms and legal departments often rely on developers from their IT department to program a single-purpose application, such as approving non-disclosure agreements. TAP enables users without programming expertise to build equivalent apps as automated workflows. TAP, using a single database and environment, brings standardization and centralization, with ready-made security and compliance. “This easily configurable platform,” explains Hectus, “can replace the effort to program a wide variety of our applications, and moreover, unify all their data into one central repository.”

3. Unifying Data Related to Legal Operations

Hectus organized KYL’s New Work Intake process as a hub which draws data from a range of other internal systems. Several data silos are now effectively linked, including eDiscovery, conflict of interest management, e-signature, CRM, budgeting and pricing, accounting and billing, docketing, and others. “The integration into TAP was straightforward and rapid to implement,” he says.

Law Firms Can Realize the Same Benefits as Corporate Legal Departments

- Legal processes are completed successfully in TAP, at far lower cost in time and staff salary time.
- Virtually every process completed on time in TAP, with no missed deadlines.
- TAP eliminates errors and missed steps from most processes.
- All collaborators involved at the correct time and in correct sequence.

- Processes repeat correctly every time, in standardized way, no matter how complicated.
- Far higher security for sensitive processes that crossorganizational lines.
- Documents and files that are relevant to each collaboration are centralized in one repository, not scattered with poor version control.
- Some legal processes completed in 90% less calendar hours, consuming 75% fewer staff hours.

Most importantly for law firms, workflow automation enables them to improve delivery of services to their clients, and is a key element of readiness to participate fully in the emerging corporate legal ecosystem.

“ It’s a question of how you want to deploy legal talent and costs: to solving significant problems for the enterprise (client), or shepherding a tedious sequence of steps over and over. Workflow automation is well suited to coordinating and driving any complex, multi-participant process.”

JUSTIN HECTUS

CIO & CISO Keesal, Young & Logan

MITRATECH

info@Mitrtech.com

US: (855) 462-6448

UK: +44 (800) 368 9334

www.Mitrtech.com