



## Customer Success Story: Duane Morris

### Overview

Duane Morris LLP, one of the 100 largest law firms in the United States, is a full-service firm of approximately 550 lawyers. Duane Morris affiliates have approximately 50 professionals engaged in ancillary service businesses. The firm represents clients across the nation and around the world through a combination of 20 offices and a relationship with an international network of independent law firms.

### Challenge

The legal industry is traditionally a process-driven environment with numerous paper-based forms that need to be completed daily. Many of these processes are common across law firms, since they are significant elements of managing the firm's overall business and ultimately servicing clients efficiently.

One process that Duane Morris sought to improve was its procedures associated with bringing on new clients, also known as New Matter Intake. The actions involved in this process include reviewing and processing new clients and new matters, as well as checking for possible prospective and actual conflicts of interest. The firm had been managing these processes through a combination of manual and electronic methods and recognized that by automating and streamlining certain elements of these processes they could create a more efficient and automated work environment.

The timing was right on target for Duane Morris, since they had already been in the process of purchasing Elite Records Manager from Thomson Elite. The firm recognized the opportunity it had to make its processes more efficient by integrating its Elite Records Manager with Business Process Management technology, so the firm sought the right product to meet its requirements.

### Highlights

#### Business Services/ Legal

#### Processes Enabled:

- New Matter Intake
- Conflicts Checks
- Leave Requests and Training Requests

#### Customer Benefits & Results:

- Enabled the firm to build automated processes that create repeatable and enforceable processes
- Attorneys are now able to quickly initiate new matter processes
- Reduced errors associated with manual data entry

After extensive due diligence, Duane Morris selected Metastorm's BPM technology for its enterprise process management solution. The firm made the choice based on Metastorm's successful track record and proven success integrating and working with Elite's financial and practice management solutions. Moreover, the firm wanted a solution that also had a consistent record of success in other industries in order to guarantee the ability to leverage the product across the firm – and Metastorm's proven results across multiple industries was unmatched.

### Solution

Using Metastorm BPM® as the global foundation for its processes, Duane Morris has successfully linked the new matter and conflicts approval processes in Metastorm with its Elite financial and practice management solutions, enabling the firm to efficiently manage their new business intake process in an auditable environment for enhanced productivity and collaboration across the firm.

Although the firm continues to use a mix of manual and automated processes, Metastorm BPM enables Duane Morris to build automated processes that create repeatable and enforceable processes, replacing employee time spent on administrative, paper-based tasks in favor of higher-value activities. With immediate access to all forms and information, attorneys are now able to quickly initiate new matter processes, and decisions can be made faster as to whether or not to open a new matter.

Duane Morris has also leveraged Metastorm BPM across its firm for other processes including administrative procedures like

Leave Requests and Training Requests that integrate with the firm's Human Resources system.

## Results

Since implementing Metastorm BPM, Duane Morris has realized a number of positive results including improved efficiency, expedited approval times, reduction in errors associated with manual data entry, and reduced costs.

The process automation, management and control capabilities that Metastorm provides have also increased employee satisfaction by empowering users with access to information to ensure that work-in-process is accounted for and no longer lost or delayed.

All in all, Metastorm has enabled Duane Morris to deliver faster and more efficient processes while simultaneously enhancing customer service and lowering overall risk.

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