



Customer Success Story:

Michael Best & Friedrich LLP

Overview

Michael Best & Friedrich LLP is one of the Midwest's oldest and largest law firms. It was founded in 1848 and today comprises of nearly 315 attorneys in six locations, offering complete legal services for business on a regional, national and international basis.

Challenge

Michael Best & Friedrich is similar to other legal firms as they are particularly process driven and overloaded with manual, paper-based processes that are required to service clients efficiently and manage the overall business of the firm.

One particular process the firm sought to automate was its New Matter Intake process – the procedure that reviews and processes new clients and new matters from existing clients. This process is one of the most critical, challenging and time consuming activities for a law firm and vital to the firm's success from both a client acquisition and retention perspective as well as for risk management. A multitude of manual procedures and paperwork are required before work can begin on a new client or new matter. These include checking for possible conflicts of interest, evaluating the business value of the matter, establishing credit worthiness of the client, and ensuring that the firm's accounting and marketing systems are updated with the information required to generate accurate billing.

Michael Best & Friedrich was managing this process using a single page four part paper form that was completed by hand and routed manually through several levels of approval using the firm's interoffice 'snail mail' method. With a multiple office environment, new cases and client matters were taking weeks to approve, and there was no way to track status and history or to maintain an audit trail. The process was hindered by lost

Highlights

Business Services/ Legal

Processes Enabled:

- New Client Matter Intake
- Write-off Requests
- Human Resources

Customer Benefits & Results:

- Attorneys can make better decisions faster and spend less time on administrative functions
- Improved efficiency and increased approval times
- Reduction in errors associated with manual data entry
- Ability to document due diligence

paperwork, missing information, or bottlenecked on someone's desk waiting for approval. With paper forms being passed back and forth between offices and departments, the firm recognized that the paperwork was spending more time in the routing envelope than actually helping the attorneys. In order to increase efficiency without sacrificing its superior client service, the firm decided to automate and streamline processes to create a more efficient and auditable work environment.

To accomplish this, Michael Best & Friedrich decided to implement a Business Process Management (BPM) solution that could address its immediate requirements while integrating with its existing systems.

Solution

Michael Best & Friedrich turned to BPM technology from Metastorm to automate procedures for new client matter intake firm-wide. In a matter of months, the firm had customized Metastorm BPM® to meet its unique needs. The firm has already begun to realize a dramatic reduction in the time required to move a new matter from request to generation of a billable client and matter number.

With immediate access to all forms and information, attorneys are now able to quickly initiate new matter processes by accessing forms displayed in their own Outlook email client. Attorneys have more information at the beginning of the process than they did before and can now make a quick decision as to whether or not to open a new matter. In addition, actions appear as an extension of Outlook, allowing users to generate a notice that a new matter process has begun. If an action needs to be

taken, options within the email allow them to enter the system, modify a form and make the change. Appropriate employees are notified when information is added or changed within a record giving attorneys complete visibility into the status of each new matter.

The firm has also successfully linked the new matter and conflicts approval system with its Elite applications and is currently working on integrating it with other databases including Interaction, its Customer Relationship Management (CRM) database. Once a new matter or new client is opened in Metastorm, the data will automatically be populated into Interaction.

Michael Best & Friedrich successfully deployed Metastorm BPM for its most critical process and has also leveraged it across its firm for many other processes including Write-Off Requests, Conference Room and Food Requests, Client Entertainment Requests as well as Human Resources processes associated with bringing on new employees.

The firm's write-off request was automated to help attorneys manage budgets for their individual matters. In the past, attorneys were required to send an explanation memo or email to their practice chair with details as to why the write-off was being requested. Once approved, it would be routed to a billing assistant who would then have to manually make the adjustments in Elite. In addition, when the firm needed to tabulate the numbers for reporting, mounds of handwritten paper would have to be sifted through and calculated manually. Using Metastorm, the firm has automated this process enabling attorneys to select particular reason codes and explanations using an electronic form. Although the form still needs to go to the practice chair for approval, it's now sent and approved automatically.

Metastorm BPM has shortened the time it takes to get adjustments into Elite and also provides the firm with statistical data they did not have before. Reports provided in Metastorm allow the firm to tabulate the dollar values to see exactly where they are in terms of write-offs and adjustments and the reasons for them.

Additional processes automated with Metastorm BPM are the Conference Room and Food Request and Client Entertainment Request. These processes are somewhat similar with the same goal of giving the firm control over conference room reservations and sporting event suites reservations. With over 300 attorneys, phone and email requests to receptionists and excel spreadsheets just weren't working any longer and also didn't provide a way to manage the expectation of costs for food and beverages. An automated form in Metastorm enables employees to request

approval for reserving conference rooms, order food from pre-approved vendors, book the corporate suite at one of the local sporting events, and even the ability to check a box to confirm that the event is billable back to a client. There is now complete coordination of efforts for scheduling and budgeting.

Michael Best & Friedrich is also in the process of implementing employee termination and employee status change processes with future plans to leverage Metastorm for additional critical processes. Metastorm BPM will also be tied to the firm's benefits carrier for HR processes in the near future.

Results

Users have embraced the new system and frequently make requests for other processes to be automated. Attorneys now have more information at their fingertips to make better decisions, faster and spend less time on administrative functions.

For its new matter intake process, Metastorm BPM has helped the firm improve efficiency, increase approval times and reduce errors associated with manual data entry. The new automated process has also cut down paper use, dramatically reduced supply costs and provides an audit trail that helps the firm document the due diligence that takes place before signing a new client or taking on a new matter for an existing client. What used to take weeks to complete can now be done in one hour.

Overall, Metastorm is helping the firm run a more effective business by enforcing stricter adherence to rules and by preventing things from slipping through the cracks. It is also hoped that by leveraging Metastorm to lower risk the firm may one day save on annual liability insurance premiums.

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