



## Customer Success Story:

# Webber Wentzel Bowens (WWB)

### Overview

Webber Wentzel Bowens (WWB) is one of the largest and oldest law firms in South Africa with a significant international practice. The firm is committed to transformation. It has a staff of almost 400 people (some 75 are partners) in a variety of legal disciplines. Local offices are situated in Johannesburg and Cape Town.

### Challenge

WWB had been managing its business and servicing its clients through a combination of manual methods and numerous paper forms that were passed through multiple departments and across two offices. The firm wanted to implement both a document management system and a business process management (BPM) system to provide a more productive, streamlined and efficient work environment. A few of the firm's compliance processes had become unwieldy and the lack of automation created areas of inefficiency. There was also an increasing need for uniformity across the firm and with it, a need for predictable quality control.

The decision to move forward was ultimately fast tracked with the onset of the Financial Intelligence Center Act (FICA) in South Africa. WWB needed to meet demands brought on by FICA – new legislation to combat money laundering, affecting all attorneys along with banks and a wide range of other businesses handling money on behalf of their clients. This legislation requires WWB to carry out due diligence to establish and verify its client's identity and to consider the particular activity when handling clients' requests. The process requires the coordination of a large number of people in the firm handling a wide variety of clients, each of whom have unique information supported by a variety of different documents sourced from numerous countries around the world.

### Highlights

#### Business Services/ Legal

#### Processes Enabled:

- Financial Intelligence Center Act (FICA) Compliance
- New Client Business

#### Customer Benefits & Results:

- Enabled the firm to meet FICA compliance and has decreased the time it takes to perform FICA procedures
- Realized greater efficiency
- Provides an audit trail that helps the firm document due diligence
- All processes are now controlled and all data is now archived

The procedures required for the firm's clients to be compliant with FICA are critical, complex, and vital to the firm's success. With WWB's old manual methods, there was no automated way to track status and history or to maintain a full audit trail.

### Solution

To help meet compliance requirements, the firm turned to BPM software from Metastorm and today, WWB has set a standard in South Africa as the first legal firm to properly adopt BPM for FICA compliance.

WWB is using Metastorm's BPM solution as a compliance backbone to respond to regulations brought on by FICA. Metastorm BPM has enabled the firm to effectively manage the regulatory aspects of new client business – for both new and existing clients – which is now a compulsory process under these new regulations. The firm currently has approximately 15,000-25,000 active matters in Metastorm BPM at any given point in time.

Metastorm BPM allows forms and information to be submitted, analyzed and transferred to secure databases where it can be retrieved as necessary for reporting, audit checks, or general monitoring.

The firm has also integrated Metastorm BPM with its practice management system from Thomson Elite. This collaboration automatically enforces compliance with legislation and yet it also allows work to commence on the client's matter after a conflict check is complete and the FICA validation process is

work in progress or has been completed.

## Results

The automation of its FICA process using Metastorm BPM has enabled the firm to meet compliance requirements, realize greater efficiency, increase productivity and improve quality control by enabling anyone involved in the process to have complete visibility of work in progress. The new automated process 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.

Metastorm BPM has been able to decrease the time it takes to perform WWB's FICA procedures since all processes are controlled and all data is saved, archived, searchable, and indexed. The use of Metastorm has also resulted in improved client service with the ability to quickly respond to clients and give them status information in real-time.

WWB is also looking to expand its use of Metastorm by implementing additional processes including a full integration with its Interwoven document management system and extending the value of Metastorm BPM with wireless connectivity, making further use of the firm's Blackberry enterprise solution with their handheld devices.

"We looked at other applications and there wasn't anything that could match Metastorm BPM and so far it has achieved our objectives 100%," stated Eugene van Vuren, IT manager at Webber Wentzel Bowens. "The ability to comprehensively comply with legislation and to handle our clients' needs whilst also being completely transparent is a significant competitive advantage, and Metastorm's BPM solution has enabled us to do just that."

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## Roundtrip Business Process Management — Why You Need It

Business Process Management (BPM) software is a powerful technology that allows organizations to automate, control, and improve critical human and system-based business processes – streamlining processes, system communication, and human collaboration by creating a single process layer across multiple systems, databases, and people and closing the gaps that so often create process inefficiency.

Business Process Management technology is fast gaining the reputation of being one of the most valuable IT investments you can make because it helps you achieve your most critical business objectives:

- Increased Productivity
- Better Customer Service
- Greater Competitive Advantage
- Stronger Financial Performance
- Regulatory Compliance

Business Process Management is so powerful because it gives you the ability to impact your most critical business processes and has a direct impact on cost, productivity, response time, visibility and profitability. Metastorm BPM helps you achieve [Enterprise Process Advantage](#) – a heightened level of business performance.

The Metastorm [BPM Suite](#) is a proven solution designed specifically to support a complete, roundtrip process lifecycle and help you achieve your critical business objectives.

Roundtrip Business Process Management is the ability to leverage technology to:

1. Model processes with a graphical tool.
2. Automate and Integrate processes based on this model – taking advantage of business rule engines, workflow, and high-performance integration technologies to create a seamless, efficient process layer across multiple people, applications and databases.
3. Participate in, manage, and monitor processes through an intuitive dashboard interface.
4. Report and analyze a process based on live process data – either at a point in time or time-phased over a period of time – to identify potential issues or areas for improvement.
5. Simulate and model process changes based on REAL process data – drawn automatically from the process database. Perform what if analysis and begin to predict trends based on past process performance. Determine what process changes will have the most positive impact and go back to Step One to apply them to the actual process.

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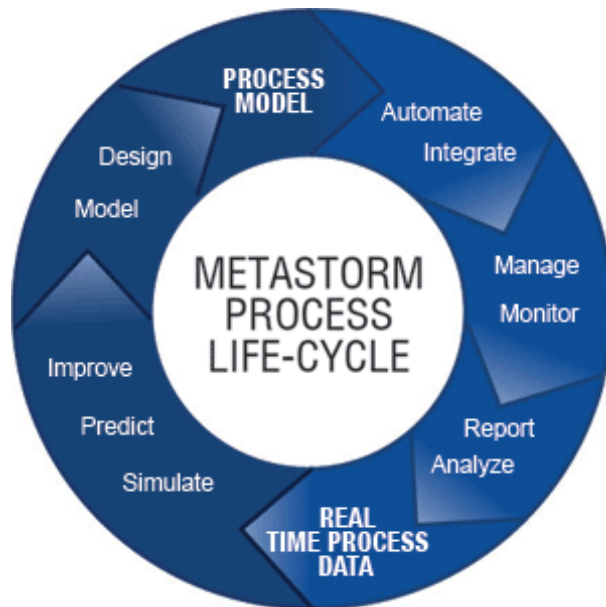
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Snapshot  
on  
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## Why Metastorm?

Metastorm BPM is one of the few solutions on the market today that enables true roundtrip process management in a fully-integrated, robust offering that incorporates best-of-breed modeling, workflow, rules management, integration, process intelligence, and process analysis capabilities. In addition, Metastorm's unique agility features enable you to not only achieve roundtrip process improvement, but to achieve it in a near real-time environment.

Metastorm is one of the top BPM vendors in the world and has a proven track record of delivering a fast return on investment and high level of customer satisfaction. Metastorm improves the unique and dynamic, human and system-intensive processes that drive your success.

## Metastorm BPM®- the Proven Technology for Enterprise-level

Customers achieve success with Metastorm BPM because it delivers on the following business requirements:

- **Flexibility** - Design a solution to meet your unique business process requirements, including form design, roles, business rules, and integration to other business applications.
- **Control** - Be confident that your operations are now working how you need them to - in accordance with corporate policies, external mandate compliance, and other predefined business requirements.
- **Tracking** - Monitor the progress of items as they move through a process cycle.
- **Collaboration** - Involve the right people at the right time inside and outside the organization.
- **Accuracy** - Put the checks and balances at the proper stage in the process, not in an exception report after the fact.
- **Insight** - Have real-time access to the lowest level of detail in a business process to better manage and analyze resources, exceptions and decisions.
- **Improvement** - See immediate improvements in process efficiency, control, and agility just through automation and increased productivity. And greater visibility into what is happening in the process combined with analysis of real process data being captured give you the ability to make the right process changes for optimum value.
- **Results** - Expect a fast impact on your business, including lower operating costs, and greater revenue potential from better customer service and faster customer acquisition. Not to mention the ability to make intelligent improvements in how you

run your business.

## What Makes Metastorm BPM Unique?

Unlike other BPM platforms, Metastorm BPM was designed around a process-centric architecture. It represents a set of proven functions needed to improve operations across horizontal and vertical business dimensions, including:

- A focus on BOTH people and system-intensive processes—optimizing what can be handled by system-to-system communication and synchronizing that with human-based decision making where it is needed.
- Customization capabilities that support the uniqueness of each company's set of business processes, and a flexible environment for making near real-time process changes and improvements.
- A design environment that allows business users to own their processes—with easy-to-use capabilities for modeling, designing, managing, and changing processes.
- A straightforward approach to process execution with unique user actions that minimize the level of effort in designing, automating, and maintaining processes.
- Robust integration capabilities that support large-scale, high-volume system-based process management, enable native process execution on multiple platforms, and allow you to leverage legacy applications within process flows.
- A standards-based technology framework that supports a pragmatic, low cost approach to new process integration and deployment – regardless of platform. Microsoft or UNIX, .NET or Java, new or legacy – Metastorm's high-performance, scalable, componentized architecture ensures you get the right results for your organization and help you get more business value out of service-oriented architecture (SOA) initiatives.
- Real-time monitoring and reporting at the lowest level of process detail, providing authorized users the insight and ability to track the progress and check the status of an item in a process, resolve exceptions, generate reports and dashboards and most importantly take action – for a point in time or time-phased over a span of days, weeks, months, or years..
- Industrial strength simulation and statistical analysis based on actual data about process performance.

Whether you have human-centric or system-to-system processes, a Microsoft or Unix infrastructure, low-volume or high-volume transactions, or a combination of these – Metastorm BPM offers options to meet all of your complex process needs.

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