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EVERSHEDS

Eversheds Speeds New Business Acceptance with Intapp Open

Client Profile

Eversheds LLP and its worldwide associate offices have over 4,500 legal and business advisers providing high quality legal services to the private and public sector and business and finance community.

Access to all these services is provided through the firm's global operations.

Eversheds combines local market knowledge and access with the specialisms, resources and capability of one of the world's largest law firms.

Firm Challenges

- Simplify and streamline conflicts management processes
- Enable management visibility and coordination across intake activity

Intapp Solution

- Intapp Open provides improved process management, better conflicts reporting and real-time information to partners
- Efficiency gains save time and free up resources to focus on business acceptance in line with firm business strat-



Kerry Kendal

Head of Operations

“We absolutely love Intapp Open. It went in and delivered. The actual integration was relatively smooth although it was on an aggressive time scale, and the system itself has been very well received across the business.”

Eversheds adopted Intapp Open to streamline business acceptance. The software has simplified conflicts searches and accelerated the evaluation of new clients and matters.

Using Intapp Open, the firm now processes an average of 160 conflicts searches daily (approximately 42,000 annually). The software enables the Eversheds Conflicts and Compliance team to create simplified, shorter reports which rank potential conflicts in the order of priority; and it provides management with real-time visibility across intake activity, enabling partners to align their efforts as needed.

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With Intapp Open, the Conflicts team now has the ability to offer an enhanced service, functioning more as conflicts analysts who are able to handle more of the basic clearing.”

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The Initial Opportunity – Improve Efficiencies in Conflicts Management

Acutely aware of inefficiencies in the firm’s existing internal process for evaluating and clearing conflicts, the Conflicts and Compliance team at Eversheds was ready for a change. According to Kerry Kendal, Head of Operations, the previous conflicts software tool they were using was “no longer fit for purpose, and generated a lot of data.” With the old system, the Conflicts team was unable to rank data by relevance or eliminate irrelevant search results. As a result, lawyers received lengthy conflict reports that were difficult and time consuming to read. Sifting through them could take hours of valuable time. Kendal adds, “You could develop a false sense of security, if the most important result had been pushed down to #174.”

Partners evaluating new matters found themselves forced to manually look up client information and financial data – a tedious process that added hours to the conflicts evaluation process. “With our previous system, we didn’t have access to past search records – so there was no record of our institutional knowledge across the firm,” says Kendal.

The net result was that the Conflicts team found themselves functioning mainly as *conflicts administrators* who ran searches for the legal teams, and had to undertake extensive quality checks to work around the limitations of the old system – to reduce the firm’s exposure to risk. “We wanted to move toward a more efficient model where *conflicts experts* were doing more of the conflicts analysis – not the legal teams,” says Kendal. A more efficient process would save both the lawyers and the Conflicts team time and resources, reduce risk for the firm, and ultimately deliver a better service to clients.

The Key to Success – Intelligent Analysis Delivers Substantial Time Savings

Intapp Open enabled Eversheds to filter and automatically clean up the data generated in conflicts searches. “We love the rules engine,” says Kendal. “The basic filters we’ve turned on so far have been helpful in eliminating irrelevant search results.” By performing intelligent analysis which strips out irrelevant results and ranks the remaining results by pre-specified criteria, Intapp Open has simplified the conflicts management process for Eversheds. “The Conflicts team now has the ability to offer an enhanced service, functioning more as conflicts analysts who are able to handle more of the basic clearing,” says Kendal.

Business efficiencies have improved dramatically as a result of Intapp Open. The Conflicts and Compliance team now processes an average of approximately 160 conflicts per day globally – or 42,000 conflict searches annually.

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“As soon as we switched the button on, the feedback from the business was really positive. There was a shift in appetite, as the commercial benefits of doing better management of conflicts became clear.” Intapp Open provides visibility into recent searches, enabling Eversheds to quickly identify when more than one partner had initiated conflict searches on similar types of business. “This made it possible to start getting partners on board to discuss and manage which client matters we take on, to avoid taking on matters that would limit future revenue potential for the firm, and avoid situations that could be embarrassing from a compliance point of view. Intapp Open has made this process a lot easier, and the overall time savings have been a big win.”

Eversheds has also successfully presented the benefits of Intapp Open to the firm’s insurers, who responded very positively to the new software-driven enhancements to the organisation’s conflicts management and client acceptance practices.

The Next Level – From Conflicts Management to Business Acceptance

Eversheds has now rolled out a second project establishing a new Business Acceptance Unit, building on the success of the conflicts analysis programme to align client matter inception with the firm’s long-term business strategy. “By fixing the inefficiencies in our basic conflicts management process, we have been able to save time and free up resources to focus on more important issues,” explains Kendal. “The Business Acceptance Unit helps to decide whether the clients we are taking on are the right ones – and whether they are the right type based on the fit with our existing client base, the clients we want to approach, and other parts of our business strategy.” The Business Acceptance team also allows for firm management to evaluate commercial conflicts – making it easier to assess the financial health of clients, the possibility of future risks, and the scope to extend business in the future.

Previously, evaluating possible conflicts involving large, sophisticated clients required manual intervention and workarounds, such as the use of spreadsheets to collate and manage key information. The old process was heavily dependent on individual analysts having to remember things such as exclusivity agreements, conflict waivers and Outside Counsel policies.

By centralising this information as part of an internal repository, providing visibility into past searches, and allowing the conflicts and legal teams to add historical information on specific clients, Intapp Open has delivered real efficiency gains – and provided better insight for firm management.

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Accolades — Expanding the Scope

The Conflicts and Compliance team at Eversheds was able to demonstrate significant efficiency gains and business benefits within months of going live with Intapp Open, winning an internal Eversheds prize for “Best Project”. The strategic value of the team’s work has been recognised by the firm’s management, and Kerry’s team has been tasked with extending the conflicts analysis and business acceptance programmes beyond the UK and across Eversheds International.

The team has also been allocated additional resources to allow it to further extend its scope and charter. “We absolutely love Intapp Open,” says Kendal. “It went in and delivered. Te actual integration was relatively smooth although it was on an aggressive time scale, and the system itself has been very well received across the business.” In 2014, the Eversheds team was shortlisted for the British Legal Awards “Best Use of Technology” award.



Leveraging over two decades of real-world experience and feedback from global organisations with demanding requirements, Intapp Open is designed specifically to address the diverse needs of firm management, lawyers, finance, IT and risk professionals.

Whether it’s part of a strategic push to improve client analysis and profitability, a program to reduce risk, or an initiative to speed matter opening and improve lawyer productivity (and satisfaction), Intapp Open has something to offer every firm. Including yours.

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