



Arnold Bloch Leibler
Lawyers and Advisers

Arnold Bloch Leibler Leverages Intapp for Successful PMS Migration

Arnold Bloch Leibler is a premier Australian commercial law firm that provides strategic legal and commercial advice nationally from its offices in Melbourne and Sydney to a diverse range of leading Australian corporations, high-net-worth individuals and large family businesses as well as international corporations.

Opportunity for Firm-Wide Transformation

In 2014, Arnold Bloch Leibler started planning the firm's migration to a new practice management system (PMS) – with an eye to minimising the potential disruption to day-to-day operations. Modernising the firm's financial management and billing software is a significant step and ABL recognised the need to plan the transition carefully for its 125 fee earners.

"If you take a holistic view of the project, the PMS is like the hub of a wheel with spokes symbolising the edge products coming off it. From a business point of view, there is huge potential to disrupt the productivity of the firm and heighten the exposure to risk when changing it – it's the core of the firm's business management and the spokes have the potential to break if not carefully planned," explains CIO David Leong.

The PMS project team turned to Intapp to help smooth the transition, and streamline the way lawyers and staff execute daily tasks and enhance service delivery to clients.

Upgrade Time Recording First

The ABL team decided to adopt and roll out a new timerecording system, Intapp Time, prior to the actual PMS changeover, because it was the most critical business application that was used by lawyers.

"We asked ourselves, who can we not disrupt the most, and where do we have the biggest exposure? In a lawyer's world, they don't care about the PMS on a daily basis – except for the ability to record time," explains Leong.

We brought forward the Intapp Time implementation as a priority to help smooth the transition. By attaching Intapp Time to our old PMS, we were able to get our lawyers to start using the new time recording system right away. They didn't even notice when we cut over to the new PMS 18 months later," he adds.

Leong is committed to providing users with the flexibility and choice to work in ways that best align with their individual work habits. "Intapp Time worked great from the start and has been a far more user-friendly experience from the outset. Our lawyers especially appreciate the ability to do mobile time recording, as well as the journaling features. Time capture allows our lawyers to go back at the end of each working day to review their journals and identify any areas where they have missed recording time."

The time capture feature of Intapp Time provides lawyers with an accurate, consolidated report of client-related activity, generated via background monitoring of key applications used throughout the day. Durations and client codes are assigned automatically and fee earners can convert individual entries via a simple drag and drop.

"There was absolutely no drop-off in time recording during the PMS changeover."

DAVID LEONG, CIO

Executive Summary

Arnold Bloch Leibler, a premier Australian commercial law firm, implemented Intapp Time ahead of its migration to a new financial management system, to minimise disruption to business operations.

Challenge

- Migration to a new practice management system (PMS) is a significant undertaking with huge potential to disrupt firm productivity and exposure to risk
- Previous time entry tool did not offer enough flexibility and support for mobile time recording
- Key business systems within the firm were disjointed, resulting in duplicate data entry

Results with Intapp

- Transition to new financial management system was a success with minimal disruption to client service or revenue-generating activities
- No loss of time recording data during the migration
- Efficiency gains in time recording
- Automated additional business processes and workflows to further improve operational efficiency



“The three Intapp products – Time, Integrate and Flow – were absolutely key to the success of our PMS migration project.”

DAVID LEONG, CIO

Business Impact After Migration

David Leong’s leadership, the PMS transition at ABL was a huge success. Most importantly, there was no loss of time recording data during the migration and no interruption to lawyers’ focus on client service. “There was literally no disruption to our time recording system. We had charted months of time recording and there was absolutely no drop-off in time recording during the changeover,” says Leong.

The project team also ensured that all lawyers and staff were fully trained on the new time recording system and processes, and followed up with refresher tips – including short video snippets – to remind users of best practices in working with Intapp Time software.

Another aspect of the PMS integration project was the opportunity to streamline and standardise the firm’s approach to workflow.

In 2015, the IT team added Intapp Flow to make it even easier to automate business processes and manage a diverse set of firm workflows. Using Intapp Flow, business analysts can create forms, assign tasks, automate notifications and track progress through an intuitive web-based interface optimized for speed and simplicity. “Intapp Flow tied it all together and made all form creation and routing of tasks seamless,” says Leong.