LISA MAYO
DIRECTOR OF DATA MANAGEMENT

Ballard Spahr Migrates from LegalKEY to Intapp for Intake and Conflicts

Ballard Spahr LLP is an Am Law 100 law firm with more than 650 lawyers in 15 offices across the United States.

In this interview, Lisa Mayo, Director of Data Management, shares her experience in working with Intapp for conflicts management, new business intake and ethical walls.

We were on a very old version of LegalKEY. We were on version 3. LegalKEY had been purchased by OpenText. They weren't really putting out any new releases, and so based on the maintenance that it would take if we needed a new report — we would have to call, spec the report out, wait for a developer to build it — it just was an older product. We needed to move to a more modern tool with a modern infrastructure and something that would respond to our needs more quickly.

We went through the process of a formal RFP, both for our conflicts system, as well as our new business intake system. What we found with Intapp was that it would provide us with a framework to be able to maintenance the system ourselves, so instead of waiting for a developer to write a report that was part of the executable, now we had the power to create the reports ourselves. If we needed to make modifications to forms or even the workflow, we now had the power to do that ourselves. It was a logical choice for us. In addition, with the conflicts system, there were a lot of features that we could take advantage of, such as the Dun & Bradstreet integration, Hoover's integration, and so that's what lead us to purchase the tool. We've been very happy with it.

Now that we're live with that on conflicts, we also see great speed to delivery. As an example, we recently were modifying our new business report which goes out to all lawyers every morning. We wanted to make a change and add an additional type of party role and relationship that we wanted to appear. We were able to do that ourselves within a day. It's very easy. We find that it's very easy for someone with basic SQL Server reporting skills, basic HTML skills, to be able to maintenance the system and quickly provide what the lawyers are looking for.

For implementation, we actually used InOutsource led by Eric Mosca. He and his team have been working with us all along. They helped us through the data clean-up, going from LegalKEY to Open, getting rid of duplicate parties so that we're starting with a clean data set, and they have been helping us now build our forms and our workflow for the new business intake portion.

We're also using Intapp Walls to enforce the client security guidelines, as an enterprise-wide system that is maintaining those ethical walls. Previously, we were able to wall off matters in our records system, and in various systems there was nothing that was an enterprise-wide function. Now we also have the security that if clients are requesting audits of our walls, we're able to produce these reports. Previously, we did not have that ability. What we've found is that this tool is meeting the client guidelines, which is what's most important.

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