



O'Melveny Modernizes Business Acceptance Process with Intapp Intake



With approximately 800 lawyers on three continents, and strong cultural ties to all locations, O'Melveny is both local and global—an international law firm experienced in everything from the fine print of a municipal zoning law to the intricacies of an international infrastructure deal. Collaboration thrives among its 15 offices.

The Drive to Overhaul Intake Processes

Since 2004, the firm had been using a homegrown system to manage intake. While straightforward and simple to use, it was not sufficiently transparent to the growing universe of its users, and relied heavily on manual shepherding by the Conflicts staff at all stages of the process. Grace Ramos, Manager, Conflicts and Engagement Management, recalls, "Conflicts staff had to piece together intake components from various sources and frequently follow up with bottlenecked approvers. A lot of the heavy lifting took place outside of the system."

The process for system updates was also complicated, and it was sometimes difficult to keep pace with policy changes around alternative fee arrangements without manual workarounds. The system was not designed for rapid deployment of important changes: "Each release of an upgrade was like a moon launch."

New Business Inception with Intapp

O'Melveny had a long history with Intapp, having purchased Intapp Walls and Intapp Integrate almost a decade ago, as well as using Intapp Flow and Intapp Time.

O'Melveny's modernization requirements focused on flexibility and ease of use. Intapp Intake fit the bill. It offered an intuitive interface for staff to use, making them more productive. The system was designed to be easily configured without any coding, enabling the IT organization to quickly change the system as requirements dictate.

Intapp Intake also enabled O'Melveny to replace paper-based processes. Previously, staff sent physical copies of engagement

letters along with new matter forms to Records. Users would independently send outside counsel guidelines to Knowledge Management. Now the system immediately shares those documents with both groups.

This method of distribution enables those teams to be instantly up to date on new matters. The same is true for alternative fee arrangements. If a new matter includes one, the system instantly alerts the finance team for tracking purposes.

The long-term relationship with the Intapp team provided dividends when implementing. Ramos explains, "Because we had been working with Intapp for so long, our introduction to Intapp Intake was very positive. It instantly felt familiar to me because it closely resembled the Walls product, which I had been using for years. We were also able to make use of longstanding relationships when putting together the Intapp implementation team."

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GRACE RAMOS, MANAGER, CONFLICTS & ENGAGEMENT MANAGEMENT

Executive Summary

O'Melveny, an 800-lawyer firm with offices across three continents, has modernized its business acceptance processes using Intapp Intake.

Challenge

- Homegrown system for intake was no longer sufficient to support firm growth
- Convoluted paper-based processes
- Lack of transparency for users
- Complicated system heavily reliant on manual updates and workarounds
- Difficult to keep up with policy changes and system upgrades

Results With Intapp

- Accelerated onboarding of new business using Intapp Intake
- Significant reduction in time in opening complicated matters with alternative fee arrangements (AFAs)
- Lawyers and staff are now more efficient
- Forms and workflows easily revised by IT
- Documents now shared digitally with Records and Knowledge Management; eliminated manual paper-based processes
- Access to confidential information managed via Intapp Walls



“Compared to the old system, it is almost like magic how quickly changes can be made.”

GRACE RAMOS, MANAGER, CONFLICTS & ENGAGEMENT MANAGEMENT

New Business Inception with Intapp

After completing the modernization of business acceptance, O'Melveny saw immediate results, starting with a dramatic reduction in the time it takes to process new business requests. This acceleration was especially noticeable for more complex matters due to a reconfiguration of the approval workflow.

Many users have professed love for the new system. In an era of increased electronic sophistication, Ramos is pleased to note that more attorneys than ever before are submitting their own requests (and promptly approving them with long-desired mobile functionality). Staff particularly appreciate how much easier it is to accomplish basic tasks. Cloning a new matter form is done in a few clicks where, previously, everything had to be reentered. This type of change boosts productivity and leads to greater consistency across matters.

IT appreciates Intapp Intake too. Tasks that used to take IT months to deploy, such as adding a new drop-down menu, can be accomplished much faster. Ramos truly values how easy it can be to revise the forms and workflows.

These results mirror its experiences with other Intapp deployments. When O'Melveny implemented Intapp Walls many years ago, the firm also saw a sea change in how the firm manages confidentiality of client information, whether barriers are required for compliance with professional standards, regulatory requirements, or clients' outside counsel guidelines.