

Automating Processes for Data Integrity & IP Practice Efficiency

Lerner, David, Littenberg, Krumholz & Mentlik LLP, commonly known as Lerner David, is a law firm specializing only in intellectual property legal services since its founding in 1969, with offices in the United States and China.



In this interview, Brian McManus, IT Systems Specialist, shares his experience working with Intapp Flow to automate business and IT processes.

Originally we were looking to Intapp Flow to automate our IP practices but it became apparent pretty early on that there was a lot more to it that we could automate some of our manual processes.

First was our data integrity, trying to keep all our files in sync at the same time. It was a manual process. It was pretty complex using SQL scripts and things like that.

Second, related to our IP practice with all their regulations and paper that was required, we were looking to eliminate our paper and files, to go more electronic and automate that process. Of course, like every other firm, we were looking to expedite these processes to make it more efficient.

What we were setting out to do, basically Intapp Flow and Intapp Integrate allowed us to do it. For example, our data integrity... Now, instead of being a manual process that took time, all the systems we have, the data that's associated with that, are now updated in real time using these products, where as soon as one system is changed, they all change at the same time.

One of the main reasons we were going to these products is eliminating our paper and files. We were able to, using Flow, basically streamline the process of paper movement, where we no longer have to pass files. We can pass the data, all the communication, everything we needed through Flow. That automates the process and it speeds things up. Things that used to take days or maybe weeks to do, we're doing now in hours, maybe a day tops, just by using these products and getting rid of all that paper and files.

The great thing about this project was that we basically did very limited training with one of the Intapp partners and then trained ourselves on how to do this.

We had our first project up and running within two weeks. That's building forms, using the workflow notifications, integration – everything. Using the product was very easy. We were able to take our existing processes and convert them over using the designer very easily.

Once you start using this it opens up the door to a lot of different things. Any manual process that you're doing basically could be automated. I've automated other things such as checklist processing where we used to pass these manual checklists from group to group, department to department. We put that in Flow. We've also started to do some of our billing and invoice processes...Also, we use Intapp Time and we're tying into that and we're going to automate a lot of our schedule of charges, flat processing fees that we have associated with filing a lot of these different things.

Once you start using Flow, it's a great benefit and people really take to it pretty quickly. It's very user friendly, very easy to pick up with not a lot of training. There is not a lot of coding required if you don't want there to be.

The main reason most people are going to go to this is that you can do more with less people. You don't need as many resources. You could eliminate a lot of the back end stuff that used to be required to do this. That's a big benefit across the board for everybody, especially for us.