



Loeb & Loeb Speeds New Business Intake, Reduces Risk with Intapp

Loeb & Loeb LLP is a multi-service law firm with approximately 350 attorneys and offices in Los Angeles, New York, Chicago, Nashville, Washington, DC, and Beijing and Hong Kong. It focuses on select core industries and practice areas rather than endeavoring to be all things to all clients. The firm represents multinational, Fortune 100 companies in their mid-market transactions and litigation matters, and serves as primary outside counsel to a multitude of mid-market clients.

Inefficiencies in Onboarding New Business

A few years ago, Loeb & Loeb observed significant inefficiencies in its onboarding process for new business.

“Our intake process was driven by a human workflow engine, meaning that the conflicts team managed the process manually,” Adam Klein, Systems Integration Manager, recalls. “In worst case scenarios it could take several weeks to complete the intake process.” Furthermore, there was no transparency, no audit trail, nor a clear way to escalate.

The paper-based workflow required a team of four dedicated to data entry. Requests would often sit on desks for days or even weeks for review. Furthermore, the conflicts team was mailing paperwork across the country for approval.

The process was also non-standard across practice areas. And since the process was so time-consuming, at times lawyers would attempt to circumvent the process. Klein explains, “Parties would sometimes go around the standard process to avoid the circus of getting something approved, and we recognized this was not a healthy approach to risk.”

Standardizing Business Acceptance

It was time to change, and Loeb & Loeb undertook an initiative to overhaul the process.

Intapp Intake was a natural choice for Loeb & Loeb. The firm was a long-time customer of Intapp, already using Intapp Walls,

Intapp Time, Intapp Flow and Intapp Integrate. The team knew the flexibility, transparency, and ease of use of Intapp would meet Loeb & Loeb requirements.

Tony Adelman, Integration Business Analyst, gathered process requirements by practice area. “We interviewed every interested party so we could understand how to move to a common process,” Adelman explains.

As Loeb & Loeb built its new business acceptance process, the firm used Intapp Integrate to connect Intapp Intake to Elite Enterprise Conflicts, allowing the intake system to auto-generate conflicts searches. This capability is quite a change from the previous method, which required a data entry team to enter reams of data to initiate the workflow.

Once implemented, Klein and Adelman rolled out Intapp Intake department by department. “We used peer pressure to get other teams to adopt the system,” says Adelman.

“Previously, it could take weeks to onboard new clients and matters... Now it is usually complete in a few hours.”

ADAM KLEIN, SYSTEMS INTEGRATION MANAGER

Executive Summary

Loeb & Loeb LLP, a multi-service law firm with 350 lawyers, is using Intapp Intake to automate, accelerate and streamline new business intake.

Challenge

- Manually driven intake process could take up to several weeks
- Paper-based workflow required a team of four dedicated to data entry
- Non-standard process across practice areas
- Temptation for lawyers to circumvent the process or skip essential steps

Results with Intapp

- New business intake is now completed in a few hours, rather than weeks
- Each matter is subject to the same evaluation criteria and assessed against the firm's business objectives
- Lawyers start work on new client matters sooner, enhancing client service
- Consistency in process enforced by Intapp Intake, improving accuracy of data, improving efficiency, reducing risk and enforcing compliance



TONY ADELMAN,
BUSINESS INTEGRATION ANALYST

Business Impact of Automated Intake

The efficiency gains were immediately apparent. The project was successful in making the human workflow engine obsolete, reducing the costs associated with new business acceptance.

Every piece of business followed the same policies and procedures, and fewer requests were traveling outside official workflows. Before the changes, the conflicts team processed about 200 requests a month; now that number sometimes reaches 800.

While firm growth accounts for some of the difference, process consistency has been a major factor. Intapp Intake forced teams to enter all required client/matter information, or not be able to initiate new business. Essential steps, such as engagement letters, could no longer be overlooked or delayed. By requiring information up front and propagating it automatically across the firm's business systems, Intapp has helped to streamline new business inception and improved the accuracy of data, while also reducing risk and enforcing compliance.

The team has also seen a dramatic reduction in the time it takes to accept new business. "Previously, it could take weeks to onboard new clients and matters, and always at least a few days," emphasizes Klein. "Now it is usually complete in a few hours."

Faster new business acceptance has meant that lawyers can start work on client matters sooner. In the case of Loeb & Loeb's Intellectual Property practice, additional automation has allowed the firm to onboard multiple trademark and patent requests simultaneously - in a matter of minutes.

By following a consistent process, each matter is subject to the same evaluation criteria and assessed against the firm's business objectives. There is no way to sneak something through, such as non-conforming discounts. "By understanding when a special discount was needed, the team could intervene early and reduce financial risk," adds Adelman.

As for new business acceptance, the next step is to deploy Intapp Conflicts. After Elite notified Loeb & Loeb of Elite Enterprise deprecation, the team knew it was time to reevaluate its conflicts system. It selected Intapp Conflicts due to its nature as best-of-breed. "Elite 3E Conflicts just was not good enough," explains Klein, "We have a best-of-breed business, and we need conflict searching capability that only Intapp provides."