McMillan Accelerates Payment Processing with Intapp Flow & Integrate

McMillan LLP is a leading business law firm serving public, private and not-for-profit clients across key industries in Canada, the United States and internationally. With recognized expertise and acknowledged leadership in major business sectors, McMillan provides solutions-oriented legal advice through its offices in Toronto, Vancouver, Calgary, Ottawa, Montréal and Hong Kong.

Paper Forms Delay Payments

McMillan's values of respect, teamwork, commitment, client service and professional excellence are at the heart of the firm's commitment to serve its clients. And it was this commitment that drove the firm's initiative to reduce the time it was taking to process its client payments, lawyer expenses and vendor invoices. As James Walker, McMillan's EPMO National Program Manager explains, "The delays in processing payments were inconsistent with McMillan's strong client service ethic."

McMillan's previous expense requisition and check requisition processes were manually intensive. Lawyers would fill out paper forms and route them to approvers to visually scan for obvious errors, who then would walk them to the accounts payable (A/P) team for processing. A/P would then transcribe all of the paper forms and enter the information into the firm's Thomson Reuters 3E financial management system so that vouchers could be created, and checks cut.

The entire process was slow, often taking up to five business days. During the end of the month when many lawyers would batch up and submit requests all at once, forms could have 100 to 200 separate lines, causing a backlog in processing time.

Automating the Payments Process

Using Intapp Flow and Integrate, McMillan has been able to automate the payments process. Now, instead of filling out paper forms that are then keyed into the 3E system, lawyers use online forms created in Intapp Flow to enter information directly.

The creation and linking of forms was simple. The low-code approach of Intapp Flow, coupled with its out-of-the-box templates, meant that McMillan's own in-house team could design the solution themselves. No third-party consultants were needed.

The online forms are intuitive. Through the use of business rules, Intapp Flow displays context-sensitive questions, masking those that do not apply. And pre-populated drop-down lists, smart lookups, and pre-population of subsequent sections reduce errors in data entry.

Once filled out, requests are tracked and managed electronically, eliminating back-and-forth movement of paper documents. Automated emails speed up approvals, providing each approver with a simple "click to approve" mechanism.

In parallel, the tax department categorizes each expense. Previously, this involved multiple steps, with forms often sent back to the lawyer to request missing information. Using Intapp Integrate and Intapp Flow, required information is captured up front, and appending the appropriate tax category is automated as part of the overall workflow.

> *"The entire backlog of paper is completely gone."*

JAMES WALKER, NATIONAL PROGRAM MANAGER, EPMO

Executive Summary

McMillan LLP, a leading business law firm headquartered in Canada, is using Intapp Flow and Intapp Integrate to automate and accelerate payment processing for its Accounts Payable team.

Challenge

- Manual paper-intensive processes for expense requisition and check requisition

- Lawyers filled out paper forms which A/P then had to transcribe and enter into the Thomson Reuters 3E financial management system

- Entire process was slow (up to 5 business days) with a backlog at end of month

Results with Intapp

- Payment processing time reduced from 2-5 days to 10-20 minutes on average

- Elimination of paper forms with web forms sending information directly to 3E

- Fewer re-keying errors and rejected invoices

- Requests sent and tracked electronically

- Training no longer required for lawyers submitting expenses

- Offsite paper archives replaced by searchable electronic records

- Improved audit controls and quick generation of analytical reports

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JAMES WALKER, NATIONAL PROGRAM MANAGER, EPMO

Business Impact of Automation & Digitization

The automation of the payments process, from data entry to approvals, has shown immediate value. First, by using electronic processing, data entry occurs only once. This results in fewer re-keying errors and rejected invoices. As a result, McMillan estimates it has cut their processing time from two to five days down to ten to twenty minutes. James Walker shares, "People are quite shocked about how quickly they are receiving notifications saying their expenses or invoices have been approved and finalized. The process is that quick now. The entire backlog of paper is completely gone."

A second benefit is the dramatic reduction in the need for training. Since the online forms use business rules to guide the lawyer through the data entry process, the drop-down selections are very intuitive and require little explanation. As Walker notes, "No real training is required. At the end of the day, it's a web form. The system is that Intuitive."

Third, McMillan's previous offsite paper archives have been replaced by searchable electronic records. Previous vendor queries on payment status involved manual searches of physical files, often requiring multiple trips. With electronic records, it is now it easier and quicker to find information, as well as run analytical reports.

Finally, the firm now has significantly better audit controls. Having searchable electronic records improves accuracy and dramatically lowers the risk of failing an audit. "This is a huge win for us," said Walker. "Intapp Flow has significantly optimized our entire AP department through integration and automation."