▶ INDUSTRY CASE STUDY

Timely automation

David Aird, IT director at DAC Beachcroft, says automating time capture, client collaboration workflows and compliance using the Intapp professional services platform is helping the firm to deliver on its digital transformation strategy

D AC Beachcroft embarked on an agile-working strategy back in 2015, coinciding with a move into new office space in Leeds. Sitting at the same desk every day was out, and a 'clear-desk policy' was in (people can no longer leave things on them at the end of the day). Alongside flexible working, a drive toward digitisation introduced significant savings in space and paper, as well as improved productivity.

But of course, having fewer desks in the office than people depends on knowing a certain number will be hard at work from home, or on the move, each day – and while that may be great for employees in search of a better work-life balance, the transition is not without its challenges.

One of these is ensuring that people have remote access to all the information and systems they need to perform effectively from any location. And a basic administrative responsibility of

lawyers is to record their time spent on client projects, whether that's in the office, at home, or anywhere in between.

Time to go

In November 2017, DAC Beachcroft decided to implement Intapp Time, a leading time management system, to ensure all its lawyers' time was accounted for as efficiently as possible. In short, it means that work can be logged swiftly from a mobile device, after which that information is automatically fed into the necessary firm management systems for ongoing analysis of – for example – performance metrics and profitability.

IT director David Aird explains: "The time-capture benefit of this project is coming through particularly strongly. As a law firm partner today you're often here, there and everywhere – off to a client meeting, then in a taxi to something else – and at the end of the day it can be difficult to recall

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exactly what you were doing when, whether that's back in the office or on the train home." And of course, human nature is such that some people will simply postpone or forget their duty, in breach of time-keeping compliance.

With Intapp Time on the case, there is no need to wait. "It automatically searches through your diary appointments and emails to surface suggestions for your time, which is obviously much easier than doing it yourself," says Aird. "On top of that, you're doing something useful with what might otherwise be 'dead time'.

Moreover, another efficiency gain is ensuring that all minutes – office-based or mobile – are recorded not only fully, but entirely correctly – the first time. "Coming with pre-programmed codes and narratives, it's simpler for fee earners to ensure they use the standard ones that some clients now specifically request," says Aird. "That helps you to avoid time being wasted in situations such as clients challenging bills, because you've recorded something in a slightly differently way." Or in a worst-case scenario, where the result is a waste of both time and money because you're beaten down to agree an unprofitable write-off.

Aird is currently only halfway through his roll-out, but says it will eventually cover all 21 locations, in the UK and internationally. It could be somewhat complicated by the different demands of the firm's many practice areas – lots of volumes and values to consider – but he says the system has already proven both flexible for this and user-friendly, as well as popular with the lawyers, who must of course be encouraged to adopt it as a standard way of working. It must 'become automatic', if you like. "It's a straightforward application, intuitive up to a point – a couple of hours of training isn't a lot in my book – and most people certainly seem to enjoy using it," he says. "In future, using AI with Intapp Time, we'll be able to enhance the accuracy of the narratives suggested by time capture, so the process becomes even more automatic."

Go with Flow?

This wasn't the firm's first automation experience with the Intapp platform – which now stretches right across the client lifecycle, from onboarding to continuous risk management and compliance monitoring, and maximising chances of cross-selling clients to improve future profitability. By automating key processes and surfacing the right

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internal intelligence at the right time, DAC Beachcroft is better positioned for client success.

A particularly innovative automation project at DAC Beachcroft has involved the sharing of information with key clients, for convenience of both parties. A few years ago, DAC Beachcroft collaborated with another panel law firm to tightly integrate the flow of information between them and one of their largest clients, Zurich Insurance. "Using Intapp Flow and Intapp Integrate, we managed to integrate many of the client's systems with ours, from matter inception to billing management. All instructions are injected directly into our matter management and finance systems, so there's no need to rely on email when handling claims," explains Aird. "Our reason for integration was that, based on our analysis, our lawyers would be duplicating an effort of about 30 minutes in processing an instruction at inception, and spending an additional 30 minutes a day on top updating our own systems and duplicating that data on a client's portals."

DAC Beachcroft now plans to continue to expand its use of Intapp's professional services platform, taking advantage of the unified approach to workflow automation, data management and pre-built integrations with other systems.

For example, he says, Intapp Flow is a highly flexible solution to have under your belt. Intapp Flow can potentially provide templates for automating the workflows that drive everything from HR procedures (joiners, leavers, recruitment, and so on), to finance tasks (payroll, accounts, expenses), document and records management and IT provisioning. "We're currently exploring its application here for several internal processes, such as managing cash, room booking and signing documents during different phases of projects," says Aird.

"The imagination is really the limit with this one." And with all that valuable time saved through automating time capture, perhaps he and his management colleagues will be able to devote even more minutes to identifying more enticing automation options in future. ◣