

Ward and Smith improves operational efficiency with Intapp Professional Services Platform



Ward and Smith, P.A., is a general practice firm of 90 attorneys in five offices throughout North Carolina. The firm is focused on differentiation through client service, and recognized that by automating critical processes and tightening integration, it could improve client satisfaction and responsiveness. Ward and Smith turned to the Intapp Professional Services Platform to help streamline key operational activities to exceed client expectations.

Charles Collins, IT Director, surfaced the opportunity to automate front-office activities. Collins knew he could provide time savings and increase the staff's efficiency by integrating HR, communications, and billing systems. "End users were having to re-key data, and that was not efficient. Our legacy process also introduced the opportunity for errors," recalls Collins. The firm selected Intapp Integrate to connect systems and automate processes.

One such process was new employee onboarding. Collins explains, "With Intapp Integrate, the amount of time it took to complete the process went from days to seconds, and reduced mistakes by eliminating manual steps in the process."

Intapp Integrate also enabled Ward and Smith's accomplished Litigation Support team to radically improve their efficiency. At times, the Litigation Support group would need to handle as many as 200,000 files for one matter. By leveraging the low-code capabilities of Intapp Integrate and automating much of the process, a laborious process that previously took days has now been reduced to as little as 20 minutes. This enables Ward and Smith to focus on the litigation matter at hand, instead of time-consuming and expensive review activities.

While Ward and Smith continues to expand the use of Intapp Integrate, it also is moving to replace a legacy workflow solution with Intapp Flow. The new check request process will allow staff and attorneys to have checks issued for items such as court fees quickly, and with less reliance on email or outdated workflow. Users will simply submit a request into Intapp Flow, and after approval and integration to Elite, the check prints in the requested office.

The Intapp Professional Services Platform also helps to reduce the risk associated with an Elite migration. Ward and Smith, like hundreds of other law firms, received notification that it will need to migrate to Elite 3E. As part of the upgrade, Ward and Smith will implement Intapp Intake and Conflicts. "Not only will the firm get best-in-class new business acceptance capabilities, but Ward and Smith will also reduce the risk of the Elite upgrade," said an enthusiastic Collins.

"Intapp makes our staff more efficient, reduces errors, and lets us provide value to our clients more quickly. Through these benefits, Intapp Integrate has paid for itself multiple times. I recommend it to other firms."

CHARLES COLLINS, IT DIRECTOR
