



## McMillan Reduces Elite Migration Risk with Intapp



Several years ago, McMillan LLP, a leading business law firm serving public, private and not-for-profit clients across key industries in Canada, the United States and internationally, set forward a new vision for the firm to strategically leverage technology to address the changing legal environment.

In the planning of this overhaul, McMillan received notification that it would need to upgrade an early version of Elite 3E to the latest version of Elite 3E. Upgrades of back office systems are inherently risky. McMillan turned to the Intapp Professional Services Platform to help reduce the risk.

Upgrades to critical back office systems such as a practice management system (PMS) or financial management system (FMS) like Elite introduce a fair amount of risk to operations. These systems perform vital back office tasks, such as billing that keep a firm operating and converting cash. However, McMillan was not using Elite for just accounting / finance; it also used it for conflicts as part of its intake processes.

To mitigate this risk, McMillan elected to deploy Intapp Intake and Conflicts before migrating its financial system. By implementing Intapp first, McMillan reduced the number of moving pieces during the upgrade process and the overall project risk.

At the same time, McMillan was also taking advantage of the opportunity to deploy best-in-class capabilities.

A critical driver behind selecting Intapp was making staff more efficient. "With Intapp Conflicts, it can take under a minute to run a straightforward conflicts search on any size entity," Walker expands. "This freed up staff to focus on value-added activities, not waiting for reports to run."

Furthermore, the firm sees conflicts cleared in as little as 15 minutes, thanks to the superior search capabilities available in Intapp Conflicts. By improving the accuracy of hits and automating rankings of results, Intapp Conflicts enables lawyers to work faster to clear conflicts, while also offering an additional layer of protection for the firm.

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*"By going live on Intapp Intake and Conflicts first, the firm lowered the overall risk of migrating to a new financial management system."*

JAMES WALKER, NATIONAL PROGRAM MANAGER, EPMO

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