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Baker Botts Successfully Migrated Key Workflows to the Intapp Secure Cloud Using Intapp Intake and Intapp Conflicts

Baker Botts turned to Intapp to improve speed and business agility, strengthen competitive advantage, and reduce IT infrastructure burden through a cloud-first strategy.

Building the Business Case for Cloud Migration

When Baker Botts brought on Rick Boulin as its new CIO in 2016, he immediately launched an assessment of the firm's existing IT infrastructure and associated budgets. He concluded that contending with off-cycle capital expenditures and maintaining a data center and all of the accompanying ongoing expenses surrounding software maintenance and patching resulted in unnecessary operational complexity and cost.

Summarizing Boulin's findings, Karen Lockhart, the firm's Director of Business and Practice Applications said, "With on-premises equipment, the software is difficult to keep up to date. Why would we restrict ourselves with lengthy upgrade cycles for new features when we can implement them immediately in the cloud?"

Given his management consulting experience, Boulin was well versed in the expansive benefits of a cloud-first approach. He knew that migrating to cloud would offer more than mere cost savings; it also would afford unique speed and agility that directly translate into competitive advantage. As such, Boulin proposed the initiative to transform Baker Botts into a cloud-first firm.

BAKER BOTTS

Baker Botts is an international law firm of approximately 750 lawyers practicing throughout a network of 14 offices around the globe. Based on the firm's experience and knowledge of its clients' industries, it is recognized as a leading firm in the energy and technology sectors. Since 1840, the firm has provided creative and effective legal solutions for its clients while demonstrating an unrelenting commitment to excellence.

The Baker Botts team quickly prioritized two key systems: new business intake and conflicts clearance. With a Metastorm-based legacy system in place, the team knew that the firm needed cloud-based software that could handle the migration of highly sophisticated workflows to the cloud, including InterAction content and World-Check know-your-customer data. Given the requirements, the Baker Botts leadership team ultimately selected and implemented Intapp Intake and Intapp Conflicts.

Vetting Cloud Options to Ensure Data Safeguards

The team committed to building a cloud-first technology stack, but Lockhart understood the potential resistance around cloud adoption. "It was really a catch-22," she said. "Although everybody understood, in the abstract, that cloud migration was a best practice, we had to convince stakeholders and firm leadership of the benefits of the cloud — and that all their concerns could be addressed."

The team also carefully weighed the impacts of cloud migration on Baker Botts' clients, particularly those in the finance and banking sectors, which are subject to stringent security protocols and regulatory requirements. "We went through an extremely vigorous vetting process and required all vendors to complete an extensive questionnaire covering encryption, data privacy, compliance, and other factors," said Lockhart. "Based on our knowledge of client specifications, we determined that we were meeting their requirements by moving to Intapp Intake and Intapp Conflicts in the cloud."

Delivering Data Securely Across the Client Lifecycle

Designed for security and purpose-built for the professional services industry, the Intapp Secure Cloud not only exceeded compliance requirements, but also afforded Baker Botts control over where data was stored and processed, and how it was accessed. Ongoing monitoring and testing for threat detection provide the peace of mind that both client and firm data remains protected. "The combination of Intapp Intake and Intapp Conflicts, along with the Intapp Secure Cloud, provided a solution that checked all of the boxes on security and compliance for us and our clients," said Lockhart.

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KAREN LOCKHART, DIRECTOR OF BUSINESS AND PRACTICE APPLICATIONS, BAKER BOTTS

In addition to best-in-class security and compliance features, the combination of Intapp Intake and Intapp Conflicts provides seamless data transfer throughout the client lifecycle, from new business intake to conflicts checking and monitoring. "The agility of the flow of information streamlined our workflow and set up lawyers to respond to opportunities more effectively," Lockhart said. "The maturity, stability, and interoperability of Intapp products supports our long-term cloud-focused roadmap."

The implementation — which entailed migrating a complex set of workflows to the cloud while providing end-to-end integrated software — was a game changer. "The solution allows us to be more agile in meeting client needs and providing up to date actionable information for strategic projects," said Lockhart.

To ensure customer success, Intapp staff remained accessible and available to help throughout the implementation process. "Intapp was a true partner throughout implementation, providing weekly training, support meetings, and office hours," said Lockhart. "This partnership ensured a smooth transition."

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Reaping the Rewards of a Cloud-First Strategy

The firm's move from on-premises capital expenditures to cloud-based deployment provides the ability to budget proactively and avoid unpredictable expenses. "Now there are no surprises lurking behind the curtain," Lockhart said. "We're always working with the latest version of everything, and have a very good feel for what our software actually costs."

Lawyers now enjoy the value of an end-to-end workflow. They have faster, mobile, and more-complete access to critical information, which in turn helps drive more favorable outcomes.

"Everyone wins with Intapp," said Madeleine La Cour, the firm's Director of Business Intake and Records. "Our risk management processes are now supported by the best tools on the market. Our lawyers have mobile access to everything they need to work remotely, and our IT staff is relieved of the on-premises infrastructure burden and can focus on more strategic projects."

Executive Summary

Challenges

- The firm needed greater speed and agility than its on-premises software could support.
- A data center created unnecessary maintenance and patching expenses as well as lengthy, cumbersome on-premises upgrade cycles.
- The firm's clients — especially those in the banking and finance sectors — required even more enhanced security and protection from compliance risk.
- Firm leaders wanted to achieve greater stability and interoperability to support a long-term cloud-first roadmap.

Results With Intapp

- **Robust competitive advantage**: Migrating intake and conflicts workloads to the cloud delivers not only cost savings, but also speed and agility.
- **Better budgeting and planning**: Replacing on-premises servers with cloud-based solutions eliminates unpredictable capital expenditures and ongoing maintenance.
- **Continuously updated software**: Updating cloud-based software is quick and seamless; there's no lag time to access valuable features and tools.
- **Stronger security and compliance**: Securing Cloud Security Alliance STAR certification and cloud-specific third-party attestations provides peace of mind around demonstrable best-in-class security, data, and operational standards.