

☛ Gaining User Acceptance for Your New Business System

by Bryn Bowen of Greenheart Consulting LLC

Efforts by firms to control exponential growth in global legal markets have resulted in the adoption of new business processes. One key assumption many firms make when they bring in workflow products is that the process they're trying to automate will fall logically into place and be universally accepted by all users. Unfortunately, not all workflow process implementations go smoothly. In some instances, new processes can be painfully slow and far more complex and cumbersome than anticipated.

Getting legal practitioners to follow new administrative procedures often has been compared to herding cats. In designing a system for your firm, it's crucial to focus on simple and obvious aspects of the task a new workflow is expected to address and recognize that having the support of firm management upfront is crucial to implementing any new business process.

Challenges of Implementing a Business Process

There are many business processes that may benefit from workflow automation. One of the most common is client/matter intake. At some firms, however, even with a new system in place, it can take weeks to marshal new client/matters from initiation through approval. As a result, the new business process starts to lose its integrity, and users come to view it as impeding rather than facilitating workflow. Here are some suggestions to mitigate an unfavorable outcome.

Streamline the new business forms. Much of the information requested on traditional new client/matter forms is not available to originating partners at the outset of an engagement. Nor is it used as part of the process to determine the suitability of a client/matter in the new business review. Focus on the primary client information and relationships, the firm's key business markers and the actual legal description of the matter as well as the involved parties and their roles in the matter.

Make it easy on the eyes. A few clearly defined sections in the workflow forms go a long way toward making partners, associates and secretaries embrace and take ownership of the process of initiating new clients/matters. Most file opening software currently available already allows the "tabbed" approach which facilitates the sectioning of forms.

Reduce the number of steps in the process. Consider using exception reporting for clients/matters which fall outside a management-defined matrix of criteria. Keep in mind that every step you add invites a delay in turnaround time. This particular suggestion may well be the most difficult one to accomplish, but with demonstrable time savings and risk reduction, you'll definitely get support from firm management.

Don't confuse the internal procedures of the new business area with the core information needed to establish new business at your firm. Proper client identification documents, evidence of a client's ability to pay its bills, compliance with the OFAC regulations, a proper description of the matter and its key parties, conflict waivers where appropriate — these are all examples of core information that a proper new business review should include. Such requirements are best documented and communicated to internal staff and reviewed regularly for statutory and management directed changes.

Keep the folks in finance and marketing happy. Identify the firm's major practice areas of law and their relationship to your specific legal departments. It will be easier for financial analysts to properly track and report consistently on the firm's lines of business if they're identified appropriately. In addition, your business development and marketing personnel will be profoundly grateful for your role in reducing overhead costs associated with packaging and defining the business of the firm.

The steps outlined above will help streamline the new workflow process, make it user-friendly and maintain the integrity of core data in your firm's primary business tracking database. Defining levels of importance for information at the outset of any new process is crucial. Even simple ideas like these can garner management support upfront and encourage users to embrace the new business process wholeheartedly once it's implemented firmwide.

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