

BPM Solutions – Legal

Metastorm is the leading provider of Business Process Management software and the only company helping organizations achieve Enterprise Process Advantage® – a heightened level of performance resulting from efficiency, agility, and control across mission critical business processes – turning unique, human-intense processes into competitive weapons that drive profitability.

Proven Process Improvement Experience

Metastorm's proven, enterprise-level BPM platform, e-Work®, supports the full roundtrip process lifecycle and enables our Pharmaceutical customers to design, automate and manage critical processes to achieve greater productivity, customer service, profitability and overall business performance improvements.

The Challenges

Firms seeking competitive advantage must find ways to perform key business functions for increased efficiency and reduced costs without sacrificing superior client service. Client acquisition and retention is key to business success in today's environment. There are many factors critical to optimizing operational performance, including:

- Faster review and approval of new business including facilitation of conflict of interest resolution
- Effective collaboration on matters between attorneys, assistants, finance, and conflicts/new business staff.
- Incorporation of industry and firm best practices into the new business process
- Implementation of 'ethical firewalls' in the conflicts clearing process – sensitive firm and client information is securely accessed
- Ability to track each step within any process and retain a history of activity for audit and control purposes
- Reduce administrative costs and time wasted on redundant data entry – enter related parties, finance and marketing data once

The Process

Reviewing and processing new business is one of the most challenging and time-consuming activities within a law firm. A variety of manual procedures and paperwork are required to check for potential conflicts of interest, business value of the matter, establish credit worthiness of the client, gather marketing data for cross-selling, and ensure that the firm's accounting systems are updated with the information required to generate accurate monthly billing statements.

Using Metastorm's Business Process Management (BPM) platform, e-Work, to automate new business intake enables firms to dramatically reduce the time required to move a new matter from request to establishing a billable client and matter number. A key component is the ability to capture only the information required for each step – first basic client/matter information and related parties for initial conflicts checking; then finance; marketing and records data as the process moves forward. Processes automated using e-Work are typically characterized by the following attributes:

Collaborative. People, across functional and geographic boundaries, are critical to the business process – collecting data, collaborating, managing exceptions and adapting processes for continued improvements.

Controlled. Through user friendly, intuitive electronic forms, only the information needed by any given individual, at that point during the process, is available.

Integrated. Legal processes require tight integration with conflicts and practice management systems, reference systems like LexisNexis™, Dun & Bradstreet, and applications such as finance (Elite), client relationship management (Interaction), and document management and imaging (iManage & Hummingbird). This integration promotes data reuse, reduces duplicate entry, and eliminates data entry errors.

Enterprise Applicability Across Many Processes

A broad survey of Metastorm customers revealed:

- 94% have achieved greater process and business visibility
- 88% have achieved faster response times and overall agility
- 71% have gained better analysis and performance measurement capabilities
- 65% have reduced process cycle time

Secure. Multi-level security allows you to control access and decision-making levels through role definitions and use of technologies such as digital signatures.

Adaptable. Business users are the “process owners” and need to be able to quickly define and modify new process solutions that fit your unique requirements – such as adjusting template forms, changing roles, and updating business rules. A firm that does not adapt their procedures to match changing market conditions will not prevail in today’s competitive landscape. Businesses must modify and change the way they work to ensure competitive advantage is maintained.

Measured. People make better decisions when they can quickly track activities through our unique Watch lists, To Do lists and reports that capture information at the lowest level through a process.

Gaining an Advantage

Metastorm’s BPM platform is the solution of choice for many of the AmLaw200 and other large international law firms - proven in deployments reaching over 30,000 users worldwide. Applying BPM to new business intake and conflicts management processes, firms can quickly achieve the following measurable results:

- Faster intake of new clients and matters
- Elimination of duplicate data entry errors and omissions
- Reduced administrative overhead
- Process compliance across global operations
- Centralized, reuse of existing data, systems and technologies through seamless integration

The Metastorm advantage is the ability to quickly and easily automate many critical processes – the way you actually do business today. Making BPM a core competency within your organization will not only impact how you provide service to new and existing clients but also change the way you operate in other areas of your business, such as:

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| ✓ Anti-Money Laundering | ✓ Prospective Search |
| ✓ Audit Letter Response | ✓ Records Management |
| ✓ Collections | ✓ Travel & Expense |
| ✓ File Closing | ✓ Voucher |

