

Client: Thomson Snell and Passmore

What we do

We work with the world's leading law firms. We help them get the maximum value, opportunity and advantage from their critical business applications. Everything we do is designed to help each of our clients run a more efficient and profitable legal practice.

We have long-standing partnerships with Thomson Reuters Elite, Intapp and iManage. We're experts in their software as we've worked with it for years. At times we've even helped develop it.

We tailor everything we do to meet the individual needs of each of our clients. So, while our projects may share similar features, none of them are ever quite the same.

Our client: Thomson Snell and Passmore

Thomson Snell and Passmore is a large law firm from the south east of England. They have more than 130 lawyers who provide a comprehensive range of services to both businesses and individuals across a wide range of practice areas. These include corporate, dispute resolution, commercial property, employment, family, residential conveyancing, estate planning, wills, probate, Court of Protection, clinical negligence and personal injury.

What they needed

Thomson Snell and Passmore were migrating their Practice Management System from Elite Envision to 3E. As a result, they wanted to develop and increase their new business intake (NBI) capacity.

In particular they wanted to give their fee earners and assistants a user-friendly, one-stop interface for conflict checking and matter inception that linked directly with 3E.

What we did

We designed and delivered an Intapp-based solution for conflicts checking and matter inception. To make sure they could have a simultaneous go-live, we dovetailed delivery of this with their migration to 3E.

This involved:

- ▲ Mapping data from 3E for Open Intake and Conflicts and highlighting any gaps during the conversion from Envision to 3E
- ▲ Inbound and outbound integration with 3E for end to end automated NBI
- ▲ Automating New Client Matter, Existing Client New Matter, Conflict Check and Anti Money Laundering into a single New Matter workflow
- ▲ Integrating client due diligence with SmartSearch and iManage
- ▲ Creating a new prospect workflow to support business development and prospect conversion to client during new matter inception
- ▲ Creating an easy to use new interface that their staff could use with minimal training
- ▲ Providing follow up coaching for efficient conflict search and resolution
- ▲ Going live with 3E with no downtime and with the inception of hundreds of matters and prospects in the first week
- ▲ Providing post go-live support to ensure the smooth operation and rapid turnaround of any agreed changes
- ▲ Planning for phase 2 enhancements to further improve their intake efficiency
- ▲ Continuing to provide support post go-live to address any technical or user adoption issues

Continued on page 2



The software we used

Intapp Open, Elite 3E, iManage, SmartSearch



What they said

'With our new business intake capability sitting in Envision, we obviously had to factor that into our 3E project – our first aim was to recreate something at least as good as the system we already had, but we were mindful too of the potential both to enhance usability and to tighten compliance a little further. Even as a standalone project, that would still have been a major undertaking requiring significant Intapp expertise - the fact that it had to be coordinated with the 3E migration only multiplied the degree of difficulty.

Where Pinnacle came into their own was that they were completely comfortable in the 3E space, fully cognizant of the conversion process and could progress the Intapp Open-based NBI solution without being derailed by what was – or was not – happening with the Elite workstream. They offered some really creative suggestions for implementing our requirements effectively while minimising customisation and development – all of which enabled us to keep on track.

They helped us develop the brief and enhance the workflows before orchestrating the Intapp and Elite tools into a very user-friendly, fast and efficient front end for our fee earners and secretaries.

Matter opening is such a constant of their day that we were delighted to be able to give them something that made the whole process frictionless – while also allowing us to just lock down a few extra risk management steps that might otherwise have been swerved.

The Pinnacle team demonstrated not just great technical capability but also an impressive understanding of business practicalities and of our people and their needs and preferences – and that gave us the confidence and assurance we needed as we negotiated the larger migration programme. We couldn't have done it without them.'

Roland Millar, Finance Director and Anthony Graham, Head of Information Systems

Can we help you?

 +44 20 7868 2016

 info@pinnacle-oa.com