

## Client: Clyde & Co LLP

### 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: Clyde & Co LLP

Clyde & Co LLP have more than 2,000 legal professionals working from 46 offices across six continents, and continue to expand rapidly. Their clients include corporates, financial institutions, private individuals and governments, who they advise on a wide range of contentious and transactional matters.

### What they needed

To keep up with their rapid growth and make sure they continue to enjoy robust global compliance, Clyde & Co LLP wanted to refresh their new business intake (NBI) and conflict checking processes. Their new system needed to integrate with their existing practice management system and be set up so they could migrate seamlessly from Enterprise to 3E at a later date.

### What we did

We delivered the project in three phases. First, using Elite Enterprise, we updated and improved their NBI and conflict checking capability. We then extended this to include new client new matter, existing client new matter and to automate their initial conflict checking processes.

In the second phase we focused on connecting into the new 3E project management system and made sure Clyde & Co LLP met their deadline for the simultaneous go-live of NBI and 3E.

### This involved:

- ▲ Remapping from Enterprise to 3E
- ▲ Client and matter maintenance
- ▲ Inbound and outbound integration with 3E for end-to-end NBI

In the third phase, we corrected elements that were compromised after going live on 3E, enhanced others in response to feedback from Clyde & Co LLP's staff and delivered new features and functionality as part of a continuous improvement programme. This included a new custom workflow for volume business.

### In particular we:

- ▲ Designed and deployed a discrete workflow to support volume work
- ▲ Improved reporting on conflicts, Blackbook and NBI process management
- ▲ Improved error handling and minimised the operational support they would need
- ▲ Trained Clyde & Co LLP's technical staff so they could continue to support and develop the project

### The software we used

Intapp Open, Intapp Integrate, Elite Enterprise and 3E.

**What they said**

'Pinnacle was absolutely pivotal to Clyde & Co LLP's ability to meet the original double deadline and then to get NBI to where it is today, an intuitive and robust solution in use by over 2,000 fee earners worldwide. They offered more than just a strong technical skill set. What we got was a professional and assured team who had the know-how, the maturity and that solid grasp of project dynamics to get things over the line.

What differentiates them is their calm, measured, and pragmatic approach, despite the evolving project requirements placing pressure on them; and their initiative in proposing creative but sound solutions to design challenges. They successfully leveraged the Intapp toolkit to help transform business acceptance within Clyde & Co LLP. At every stage, this 'can do' team got it done.'

*Peter Kelly, Clyde & Co LLP*

Can we help you?

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