

## BCF delivers business wins with new client-centric onboarding process

"We can inform client teams better, share information to promote cross-selling, and differentiate our firm from competitors to win the right business."

Sarah Mitchell, Chief Client Development and Marketing Strategy Officer, BCF

**BCF imagined a more cohesive and client-centric experience for their business development and onboarding processes. Traditionally, these functions were conducted separately, and information was not shared, resulting in challenges with information governance.**

BCF uses Intapp applications to manage and validate conflicts as part of the firm's new business intake process. They wanted to more closely integrate Intapp with their business development and financial management applications to better synchronize information, and build more end-to-end process automation across departments.

A key priority was to harmonize marketing and onboarding processes by breaking down silos to provide better quality data and to integrate operations across multiple systems. The ultimate goal was to make partners and client teams more successful by providing a global view of prospective business.

"We needed to facilitate the sharing of relational and financial information to promote collaboration, synergies, and achieve our business objectives," says Sarah Mitchell, Chief Client Development and Marketing Strategy Officer for BCF.

### Orchestrating change

BCF flipped their process to begin their intake process in Salesforce, the firm's business development & CRM system. Workflows and forms were created in Intapp to initiate the conflicts checking process in Salesforce and then to create new client and matter records within 3E, the firm's financial management system.

Harbor specialists stepped in to manage the upgrade of Intapp, create the forms and workflows, build the integrations to initiate the conflicts process in Salesforce, and then create a new client and matter in 3E.



"Harbor's deep knowledge of Intapp and experience with 3E and Salesforce helped to move the process forward," reports Zahra Sheik-Reza, Director of IT Operations for BCF.

### Seamless client onboarding

"It was critical to ensure that all users were very comfortable with the process before we went live. Harbor worked diligently with our team to ensure that assistants and attorneys were satisfied," says Mitchell.

"Our onboarding process is smoother and more informed. The ultimate outcome is that our attorneys and administrative teams can seamlessly onboard a piece of work within a single process," explains Mitchell.

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## BFC

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