

## Specialist Intapp training and support set up Fisher Phillips for solid return on investment

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Roberta Withrow, Project Manager, Fisher Phillips LLP

**Fisher Phillips is a leading US law firm with 230 attorneys specializing in employment and labor law. After implementing the Intapp Open applications for new business intake and conflicts processing, the firm sought specialist training and support from Harbor to ensure the new technology was adopted quickly and effectively.**

Replacing a program developed in-house, the Intapp software was implemented to collect more detailed party information in the conflicts checking process, obtain better data at intake and gain the ability to open matters faster.

But with 600 users, including all attorneys and staff in 32 offices, Roberta Withrow, Project Manager, Fisher Phillips, says the firm understood that training and support had to be far-reaching for such a mission-critical application.

"We selected Harbor based on their great reputation and the positive evaluation of the firm's IT department. We knew that training and support in the application were crucial to obtaining a rapid return on investment."

### Comprehensive training roll-out

Six hundred users were invited to take the training. To ensure participation and optimal adoption, presentations were made first to team captains and office managers. Office managers then shared the benefits, and the training plans, with their local users. Ongoing information about the roll-out was communicated at firm meetings, introductory emails to users in each office, TIPS emails to users, and on the firm's intranet.

Withrow says the majority of the training was conducted remotely by Harbor.

"Instructor-led, live webinars were offered to each office, and recorded sessions were posted online. In addition, onsite support was provided in our Irvine and Atlanta offices, with remote support to all remaining offices."

To help users adjust to the new system, attorneys and staff were provided with tailored user guides and an information checklist for gathering the necessary conflicts information.



The support team established a central Intapp Support email to address user questions and a dedicated training phone number for the Trainer on Call support.

“To provide just-in-time training, we also rolled out e-learning segmented into roles and workflows,” says Withrow. “New hires watch the recorded session, have a live Q&A with a trainer and are then provided the e-learning.”

### Lessons learned

The firm gathered great feedback from its stakeholders, the users and the training and support team. It learned that engaging its office administrators early and often in the training and awareness program was vital.

“In the next initiative, we will allocate more time and resources on change management activities – engaging the office administrators more, making training mandatory, and providing CLE credit,” says Withrow. She also recommends engaging attorneys more in creating the input form at the outset.

Another key lesson learned was to separate the communication about the workflow/intake requirements from the actual application.

That way says Withrow, it will be clear what is a process/protocol issue and an application issue.

She says the firm was impressed with the depth of the support materials and the quality of the Harbor trainers. “Users were well cared for and received the training and support to hit the ground running.”

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### Hewlett Packard Enterprise

Fisher Phillips is a law firm with 230 attorneys and 600 users across 32 offices. It continuously looks for ways to work more efficiently and better serve clients. Firm leadership can make decisions quickly to direct the necessary resources to a particular challenge. They are able to use their broad database of experience to improve their internal processes and thereby propose competitive alternative fee arrangements.