

## Migrating conflicts processes and data with complete accuracy and minimal disruption

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James Walker, Senior Project Manager, McMillan

**When seeking a professional services provider to support an upcoming Intapp project, Toronto-headquartered law firm McMillan sought one that demonstrated its values of respect, teamwork and a relentless commitment to client service. It selected Harbor, drawing on their expertise in legal software, process design and integration to help migrate its conflict management processes from the Elite 3E platform to Intapp Open.**

McMillan wanted to upgrade to the latest version of Intapp Open, use it for both intake and conflicts, and implement industry best practices across the enterprise with minimal disruption to front-office personnel.

### Unifying data and accelerating search

James Walker, Senior Project Manager, McMillan, says by removing the conflicts processes from 3E, the firm hoped to enhance performance and reduce its 3E footprint to simplify ongoing maintenance and upgrades. But it also wanted to speed up search time when running conflicts reports.

"With some of our large entities, we would break up the conflict search in 3E into four pieces and then reattach them as one report. Large entity searches could take up to 30 minutes."

McMillan aimed to have a unified intake and conflicts process in Intapp Open, enabling additional capabilities. "Intapp Open offers advanced search algorithms with rich, relationship-focused data reporting. By integrating conflicts with intake, we would establish an audit trail for every approval process step, complete with an attached conflict search report."



The data conversion process posed some challenges because McMillan was already live on Intapp Open. “Most firms implement conflicts and intake as one module. Ours were separate. This made the data conversion more difficult because we had already synced client matter data. It wasn’t a clean transfer,” Walker explains.

### Choosing the best provider

McMillan embarked upon a robust vendor selection process. It established selection criteria and ranked service providers by ability. Of the three providers shortlisted for consideration, Harbor surpassed the rest.

“Our biggest reason for choosing Harbor was its knowledge and expertise on the 3E platform. They are experts in 3E, have performed implementations, and engaged in multiple projects over time,” says Walker.

Beyond technical expertise, McMillan’s comfort level with Harbor was high. “They were the easiest to work with when constructing a statement of work for this project. Their approach to the project, its methodology, and project management were similar to ours, which elevated them over other vendors.”

### Value-added expertise

Harbor appointed four people to the project, run on a tight timeline of three months. The project was completed on time and within budget.

Initially, McMillan was not going to modify its conflicts processes. But after working with the conflicts subject matter expert Harbor assigned to the project, they decided to redesign for greater efficiency.

“The conflicts subject matter expert was phenomenal in risk management best practices,” Walker says. “The conflicts report the team redesigned has been extremely well received by our lawyers.”

### Reaping the rewards

McMillan has improved data accuracy and streamlined its intake and conflicts processes. By migrating conflicts out of 3E, performance for that system has improved and leaves McMillan with a smaller footprint to maintain.

Walker says running conflicts reports has been reduced from 30 minutes to three seconds for all reports, significantly improving productivity.

“In addition, our conflicts team no longer has to use advanced search strings. The software has automated intelligence and conditioning that minimizes human errors.”

Helping to make all of these benefits possible was Harbor, a services partner McMillan believes can provide ongoing value. “Overall, we felt that Harbor was extremely professional,” Walker says. “We have several other projects coming up. Harbor will be the first company we call.”

“Harbor is highly proficient in legal software. The expertise of their professionals cuts down on project hours and cost.”

James Walker, Senior Project Manager, McMillan

## HARBOR

Harbor is a trusted provider of professional services to the world’s leading law firms, corporations, and their law departments. With our globally integrated team of industry experts – strategists, technologists, and specialists – we navigate alongside our clients, providing essential resources and invaluable insights to help steer them towards a future where they can thrive.

### McMillan

McMillan serves public, private, and not-for-profit clients across key industries in Canada, the United States, and internationally with recognized expertise and acknowledged leadership in major business sectors. The firm’s values—respect, teamwork, commitment, client service, and professional excellence—are at the heart of McMillan’s service to its clients, local communities, and legal professionals.

*This engagement was executed by Wilson Allen, one of the companies that merged to form Harbor.*