

Expert migration services simplify transition to new finance platform

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Mintz, Levin, Cohn, Ferris, Glovsky and Popeo (Mintz) is a well-established, 550-strong attorney law firm with seven offices in the United States and one in London. The firm had been running its business operations using the same law firm management solution since 1993.

However, after learning of the planned sunset of its Enterprise software, it decided to implement 3E, a modern replacement system. To help it manage the complex migration to the new platform, it sought out the legal technology expertise of Harbor.

Brian Mantarian, Chief Financial Officer, Mintz, says the firm wanted the right service provider to provide preparatory support to the project team and to help complete the project as seamlessly as possible.

"We wanted to engage a service provider with application subject-matter expertise and experience with data validation, custom report development, and Intapp data integration services."

Mintz has a long association with Harbor, partnering with the company on several significant technology projects. "Harbor has the right people with the right skills. They know legal software, how our firm operates, and what needs to be done to solve a problem," Mantarian adds.

Doing the migration groundwork

To help the firm prepare to migrate to the new financial management platform, Mintz engaged Harbor to conduct a key planning workshop.

"Our directors who specialize in migrations and new implementations led this workshop," says Rob Beisswenger, Senior Director of Professional Services, Harbor. "Going through this process enabled Mintz to articulate the project scope and objectives fully before embarking on the project."

Mintz determined a potential budget, identified the team structure, prepared risk mitigation strategies, and established a change management plan.



Harbor developed a data integration strategy to prepare the firm's data for migration. Its team of specialists assessed the data quality, cleaned the source data, and prepared it for conversion, migration, validation, and balancing. This complete suite of data services helped to ensure a clean and complete data conversion from Enterprise to 3E.

Deploying a solid data strategy

Harbor reviewed the firm's overall data integration requirements and helped design and build a master data repository system to move to the new financial management system.

"We validated the various systems tied to Mintz's legacy system, such as its new business intake system, disbursement systems, and other third-party applications from this master data source," explains Shishir Shetty, COO, Harbor. "When the firm switched to the new platform, the source to the master data was changed without much impact on downstream systems."

The conversion of data from the old to the new system and the quality of the migrated data was a key area of focus.

Mantarian says Harbor helped simplify the data conversion process. "They have done numerous conversions and were able to run a script to identify potential issues quickly. It's pretty amazing what they were able to do."

Mintz took advantage of a full complement of Harbor services to support its implementation. These services included project management, data management, integration, and customizing templates and reports.

The secret to a smooth transition

Rather than rushing through the project scope, Mintz approached the implementation in a deliberate manner. It also adhered to a policy of implementing standard functionality as much as possible. This discipline helped simplify the project and streamline the effort.

Beisswenger believes one of the most critical factors for a successful implementation is doing the homework upfront. He suggests listing objectives to ensure they fit the budget and timeline. "Make sure your scope is sound, that you're replacing all the software you need to replace, and have a solid platform moving forward."

"Harbor **knows all there is to know** about the technical aspects of implementation, which helped steer us in the **right direction**."

Brian Mantarian, Chief Financial Officer, Mintz

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.

Mintz

A Boston institution since 1933, Mintz, Levin, Cohn, Ferris, Glovsky and Popeo (Mintz) is an AM Law 100 firm with 550 attorneys and a global reach. It applies industry and subject-matter expertise to solve business problems for thousands of organizations and individuals. The firm's attorneys help clients navigate the ever-shifting landscapes of business and industry—solving real-world problems and creating real-world potential.

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