

Training and change management key to smooth Intapp Billstream implementation

"In my eight-year career managing the implementation of enterprise projects, Harbor has been the most professional, responsive, collaborative, engaged and supportive partner I've ever worked with."

Korri Ostheller-Munyan, Senior Project Manager, Perkins Coie

At Perkins Coie—with more than 1000 lawyers billing more than a billion dollars a year—changing from a manual billing system to the Intapp Billstream online billing system was a potentially seismic event.

In the hot seat in charge of this mission-critical project was Korri Ostheller-Munyan, Senior Project Manager at Perkins Coie, with assistance from Harbor's training and adoption team led by John Attinger.

Outgrowing manual processes

The billing system to be replaced was highly manual, says Ostheller-Munyan. Billers would compile and circulate large PDFs, which were printed and manually edited.

"We had reached an inflection point in our growth," she says. "Billing processes needed to be streamlined and to reflect their strategic importance. In addition, organizational and behavioural changes were required, and we recognized we had a significant communication challenge."

In 2019, soon after the contract was signed for Billstream, Covid struck. This was a silver lining for the Intapp Billstream

implementation as Perkins Coie pivoted to meet a remote working scenario. Proformas were sent via email, and changes were made online utilizing Adobe PDF and Word.

"This made our change management somewhat easier. We were aware our attorneys and legal practice assistants would resist change, but the pandemic was a catalyst to move to technology for proforma management," Ostheller-Munyan recalls.

Expert training delivery

Working closely with Harbor and over several internal sessions, an implementation and adoption plan was developed.

"We knew our training department was resource-constrained, so we worked with Harbor's John Attinger and his team to identify a training plan for the pilot group," Ostheller-Munyan recounts. "We developed 11 on-demand videos that outlined the major areas of Intapp Billstream. In addition, we created a 'What's In It For Me' video to inform our end users what Billstream could do for them, a training script, and curriculum. When we went to pilot, we had three trainers from Harbor, including two that trained our trainers."



In the first instance, the deployment kicked off with a two-month pilot with ten attorneys and 80 collaborating attorneys. At the completion of the pilot, the Perkins Coie team took their lessons learned, made adjustments, and then began a four-phase rollout across the firm. Training intensified throughout the rollout with sessions three times a week, sometimes two one-hour sessions daily.

In addition to training, there were drop-in sessions for the attorneys, paralegals, and legal practice assistants via WebEx. In the middle of the billing cycle, they could drop into a session, get the guidance needed, and leave. The training sessions were recorded and made available to all end users.

Hand-in-hand with the training was a robust change management plan, with Perkins Coie's internal change management manager an integral part of the project team.

At the end of the rollout, Perkins Coie brought in its trainers to take over gradually from the Harbor trainers with some overlapping and shadowing.

"Harbor was completely invested and was a true partner on the journey."

Korri Ostheller-Munyan,
Senior Project Manager at Perkins Coie

Partnering for success

"Throughout the project, there was scepticism," recalls Ostheller-Munyan. "We anticipated there may be a drop in revenue during the implementation process, but we met or exceeded budgets.

"Our CFO had visibility through the process, including greater visibility into WIP than previously, and could hold attorneys accountable for proforma-returning delays. Attorneys and legal practice assistants like the increased ability to see and track changes through the billing process. Our Billing team also had greater insight into proforma management and tracking proformas for submission based on predetermined deadlines.

"Changing mindset and behaviours takes time, reinforcement, and strong leadership, week after week and month after month. Some attorneys still don't utilize Intapp Billstream, but their legal practice assistants do. Overall we have 90 to 95 percent adoption. Since the firmwide rollout, we've received positive feedback from our attorneys and legal practice assistants.

"In my eight-year career managing the implementation of enterprise projects, Harbor was the most professional, responsive, collaborative, engaged and supportive partner I have ever worked with.

"Implementing Intapp Billstream was a mission-critical project. They were invested entirely and were true partners on the journey," says Ostheller-Munyan.

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Perkins Coie

Perkins Coie is an international law firm headquartered in Seattle, Washington, with more than 1100 lawyers and offices across the United States and Asia. The firm provides a full array of corporate, commercial litigation, intellectual property and regulatory legal advice to around 10,000 clients annually, generating more than \$900 million in revenue.

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