

Intapp integration with Aderant harmonizes client intake process at Higgs

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Adam Cutler, IT Director, Higgs LLP

Higgs LLP is an award-winning law firm in the Midlands area of England that employs approximately 200 people. The firm drew upon Harbor's expertise to replace its existing new business intake and conflicts solution with Intapp Open and Conflicts to improve integration across core line-of-business systems and drive improved business efficiencies.

In keeping with its modernization imperative, Adam Cutler, IT Director, Higgs LLP, says the firm wanted to implement a solution to automate and gain better control of new client acquisition processes and make it easier for lawyers to follow risk and compliance procedures.

"We thought it would be beneficial to split out the client matter inception process from our core case management system," Cutler says. "Plus, Intapp has a range of offerings that follow the same security model and integrate harmoniously with each other. We thought this was a reasonable way to introduce Intapp into our environment."

Intapp skills on tap

Intapp recommended Harbor as the implementation partner for the project. Harbor was a natural fit for this effort after completing the certification process to provide services for Intapp products and as a service partner to Aderant.

Harbor kicked off the implementation by performing the solution design and business analysis phases. During this stage, Harbor's project team worked with Higgs LLP to ensure the intake and conflicts processes were connected.

This way, when lawyers start the new business intake process, it triggers the conflicts process and prompts a series of approvals. Questions related to risk assessment are built in to enforce the firm's risk and compliance policies.

Harbor repurposed an existing custom integration solution already in use at the firm to streamline the integration of Intapp directly to the firm's Aderant Expert instance.



Creative answers tackle scope changes

Early in the project, Higgs LLP had intended to merely replace its legacy system. However, as the project evolved, the firm wanted to build more and more automation into the process, which Harbor's team helped design.

"We must've shifted scope at least 10 or 15 times," Cutler says. "The Harbor team offered excellent suggestions and creative thinking about how to make things happen."

Glyn Morris, Partner, Higgs LLP, says, "When there's been an issue, we worked through it well. Plus, there were several times when our people had to work on other things. Harbor was amenable throughout the process, and ultimately it's been a successful relationship."

Benefits of connectivity

Morris says Higgs LLP benefits from integrating Intapp Open and Aderant Expert when maintaining group structures and operating client rates.

"For example, when opening a new client, if that client is part of an existing client group with special rates, those rates and group structures are fed back into Intapp and available to select from a dropdown menu.

"That's been a major benefit to us. This way, we won't start clients and matters in the wrong rate set and record time at the wrong values."

Solution simplifies risk and compliance

After working in a standalone system with limited visibility and control, the firm now has a centralized system and remote access to a much more rigorous process. Harbor helped the firm improve the number of intake questions and built in more automation than initially planned.

"If you want lawyers to do as little administrative work as possible around risk and compliance but do it well, you've got to implement systems that handle most of the effort," says Morris. "We've accomplished that."

"One of our biggest challenges was harnessing technology to ensure people do the right things around compliance and risk," says Cutler. "But now it's very intuitive, which I attribute more to how our solution was designed than possibly the underlying technology."

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Higgs LLP

Higgs LLP is an award-winning law firm in the Midlands area of England that employs approximately 200 people, including equity partners, salaried partners, and junior lawyers (associates and solicitors) and staff. A focus on partnership, balance, long-term relationships, reputation, and community have served as guiding principles for the firm since its founding 145 years ago. Adhering to these values across everything it does helps ensure the firm's clients and people experience the difference Higgs LLP offers.