

# New Business Intake Solution

## Client Selection and Conflicts Management Platform



### Overview

*The **New Business Intake Solution (NBIS)** from Hinshaw & Culbertson LLP and Project Leadership Associates (PLA) is a “made-to-order” system, which combines state-of-the-art information gathering, customized to each firm’s special circumstances and needs, with a workflow process that enables you to make “real time” new business decisions (encompassing new clients and new matters for existing clients).*

*The NBIS enables you to: make timely and improved judgments; better protect your firm from both ethical and business conflicts as well as client suitability issues; align each intake with your firm’s strategy; and reduce the time it takes to open matters.*

“Going it alone” to automate new business intake procedures involves a huge investment in time, effort and money. By starting with a time-tested and proven solution, built on top of established technologies, you can reduce the drain on your intellectual capital, and internal firm resources, and get to a working new business intake/conflicts prototype at a fraction of the time and cost.

All firms have a distinct culture and a varying degree of tolerance for risk. Our NBIS is easily tailored to your needs and includes a personalized risk review by an industry recognized leader recently named one of the “Best Lawyers in America®” in the area of Ethics and Professional Responsibility Law. Hinshaw has teamed with PLA, the leading and largest business and technology consulting provider focused on US-based law firms, to deliver this outstanding client selection and conflict management platform.

## “What are other firms doing...?”

We hear this question repeatedly from our clients. Our extensive experience designing and developing intake systems for medium to large sized firms has given us the perspective to advise firm leadership on new client and matter intake and conflicts risk management. We can help you create a client and matter intake management platform customized to your firm’s particular needs. Starting with an “out-of-the-box” solution based on experience gleaned from working with many firms, we will customize the platform for your firm.

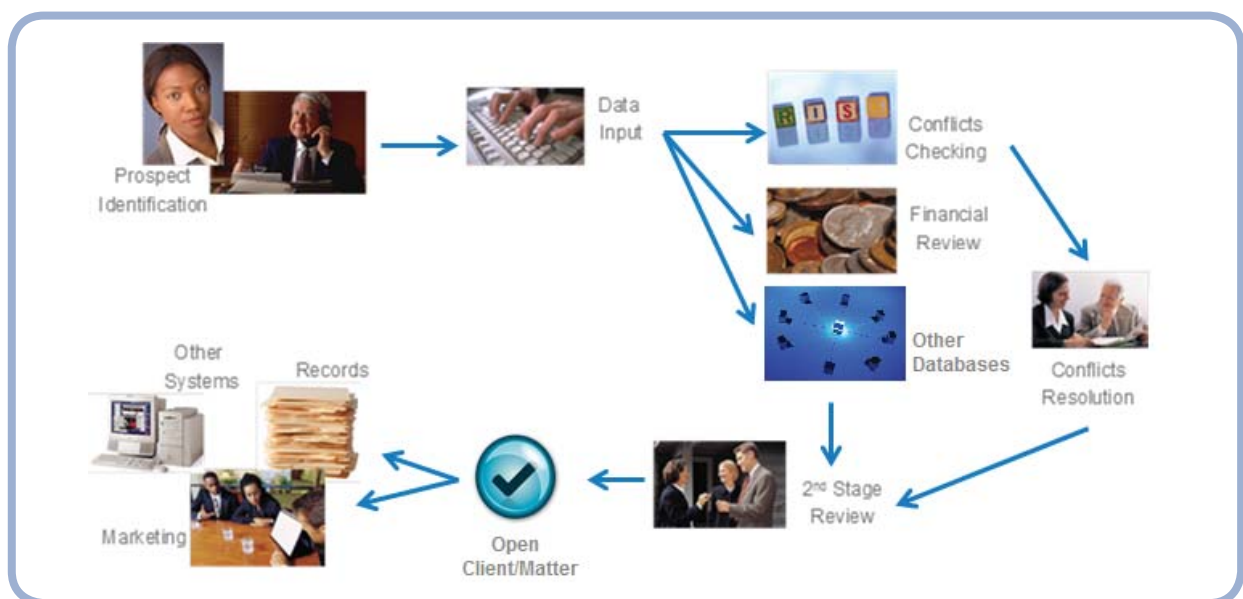
## “What do you do...?”

The NBIS encompasses the following major tasks:

- We work with you to identify additional information that would be both useful and feasible for the firm to gather during the client and matter intake process;
- We build the intake forms to collect the critical and appropriate information relating to conflicts of interest and client and matter suitability generally and customize them for each of the firm’s practice areas;
- We review the firm’s existing structure for managing and overseeing client and matter intake, and consider what changes in that structure are desirable and feasible in order to enhance the firm’s client and matter selection process;
- We work with you to determine the appropriate workflows and approval structures and mechanisms for identifying and resolving conflicts of interest and client and matter suitability questions;
- We develop the reports and workflow processes that will best enable you to oversee and manage the new client and matter intake process;
- We test and deploy the custom designed platform and help train your key staff members and in-house trainers to facilitate the roll-out, deployment and implementation of the NBIS.

## “What is considered to be within the scope of new business intake/conflicts platform?”

We consider client prospect identification through matter opening to be within the scope of our engagements, as depicted below.



## “How can your services and automation platform help us?”

The following are the benefits you will obtain from adopting our NBIS:

### ■ **Better risk control:**

- » Timely and more rigorous conflicts clearance process
- » Lessen the firm’s exposure to a catastrophic liability for
  - » disqualification motions – and disqualification
  - » loss of fees and fee disgorgement
  - » malpractice claims
  - » professional discipline
- » Fewer lawsuits, resulting in lower nonbillable time and less defense/settlement dollars and minimized expenditures of deductible/self insured retention dollars
- » Potentially reduce malpractice insurance premiums

### ■ **Reduction in working capital needs:**

- » Streamlined, less error-prone billing and collection process reduces average A/R
- » Reductions in Days Sales Outstanding (DSO)

### ■ **Reduction in write-offs:**

- » Systematized approach to client screening or suitability and ability to pay appropriate fees
- » Lower exposure to credit-related losses incurred through bad debt write-offs

### ■ **Optimize attorney time:**

- » One time input populates the system going forward
- » Increased visibility into the status of new business requests
- » Less rework
- » Fewer case issues
- » Improvements in data integrity

### ■ **More productive administrative staff** (secretarial, conflicts, records, finance, office management) and increased satisfaction:

- » More user-friendly business intake capability
- » Reduced time entry
- » Reduced corrections

## “What are the technical requirements?”

The NBIS is built on the OpenText Metastorm BPM product version 9.

<b>Hardware Requirements:</b>	<b>Software Requirements:</b>	<b>Database Requirements:</b>
Processor: 2 Ghz and higher Memory: 2 GB and higher	Windows 2003, 2008 ASP.NET 3.5 IIS	SQL 2005 SP4 or higher



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If you are interested in learning more about our **New Business Intake Solution** and our bundled ethics and professional responsibility legal services, please call **Anthony Davis** at 212-935-1100 or write us at [adavis@hinshawlaw.com](mailto:adavis@hinshawlaw.com).

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## About Hinshaw & Culbertson LLP's Lawyers for the Profession® Practice Group

Hinshaw's Lawyers for the Profession® Practice Group is a national team with partners throughout the United States. Our practice encompasses every aspect of the "law governing lawyers," including Professional Responsibility Counseling and Representation, Law Firm Organization and Structure, and Risk Management Services.

Hinshaw & Culbertson LLP is a full-service national law firm providing coordinated legal services across the United States, as well as regionally and locally. Founded in 1934, the firm has approximately 500 attorneys in 24 offices located in Arizona, California, Florida, Illinois, Indiana, Massachusetts, Minnesota, Missouri, New York, Oregon, Rhode Island and Wisconsin.

## About Project Leadership Associates

Project Leadership Associates, Inc. (PLA) is the largest provider of business and technology consulting solutions, focused on the US legal market. Since 1998, PLA has served more than 450 global and US law firm and corporate legal departments of all sizes. PLA's legal consulting services span strategy execution, law firm practice and administrative operations, IT strategy, software applications and infrastructure planning, selection and implementation. Its legal operations services' span business intake/conflicts; back office; IT; litigation readiness and e-discovery; document, records and knowledge management; business recovery/continuity planning; finance; HR; docket, etc. PLA also offers legal technology consulting services that bridge software applications and infrastructure solutions including business intelligence and financial reporting tools, managed/outsourced IT services, intranets/extranets and technology solutions from many leading industry vendors. Additional information on PLA's services can be found at [www.projectleadership.net](http://www.projectleadership.net).



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