

Hinshaw Releases New Business Intake Solution

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Hinshaw & Culbertson LLP and Project Leadership Associates (PLA) have released the New Business Intake Solution (NBIS), a one-of-a-kind new client and matter intake management platform for law firms. The NBIS is available to law firms of all sizes and is customized to each firm's specific culture and needs.

As part of the NBIS, Hinshaw and PLA will:

- review the firm's existing client intake policies, procedures and forms;
- meet with and advise appropriate members of the firm's management team, senior administrators and senior risk managers;
- advise and assist the firm in developing a comprehensive set of model policies, procedures and forms for adoption by the firm in an integrated client selection and conflicts management digital platform for use throughout the firm;
- work with the law firm to identify additional information that would be both useful and feasible for the firm to gather during the client and matter intake process;
- 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;
- 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;
- work with the law firm to determine the appropriate workflows and approval structures and mechanisms for identifying and resolving conflicts of interest and client and matter suitability questions;
- develop the reports and workflow processes that will best enable the firm to oversee and manage the new client and matter intake process;
- test and deploy the custom designed platform and help train the firm's key staff members and in-house trainers to facilitate the roll-out, deployment and implementation of the NBIS.

Speaking about the product, Anthony E. Davis stated, "going it alone to automate new business intake procedures involves a huge investment in time, effort and money. By employing and adapting the NBIS to their

established technologies, law firms will be able to reduce the drain on their intellectual capital and internal firm resources, and get to a working new business intake/conflicts prototype at a fraction of the time and cost.” He added, “Like our own firm, law firms that implement it will experience much more efficient and effective client and matter intake management.”

Hinshaw & Culbertson LLP is a U.S.-based law firm with offices nationwide. The firm’s national reputation spans the insurance industry, the financial services sector, professional services, and other highly regulated industries. Hinshaw provides holistic legal solutions—from litigation and dispute resolution, and business advisory and transactional services, to regulatory compliance—for clients of all sizes. Visit www.hinshawlaw.com for more information and follow @Hinshaw on LinkedIn and X.