

Selecting new conflict and intake software – key considerations for law firms

*Conflicts and intake software is at the core of a successful risk management strategy for **law firms** – for identifying potential conflicts of interest, evaluating new business opportunities and vetting lateral candidates' clients.*

Several popular software platforms are reaching the end of their life, with support and updates no longer being provided. Even law firms that do not use such products are increasingly experiencing problems with antiquated “home-grown” software.

As a result, **law firms should review their current conflicts and intake processes** and consider how new software can increase operational efficiencies and help drive revenues in both the short and long term.

Assemble a Review Team and Cast a Wide Net for Input

The first step in evaluating conflicts and intake processes is to assemble a review team. The firm's general counsel, chief operating officer, and chief information officer are best positioned to lead this effort due to their close working relationships with colleagues who have direct day-to-day experience with the relevant systems. The manager of the firm's conflicts and intake department would also help oversee the project.

Project leaders should solicit input from conflicts and intake team members about the strengths and weaknesses of the firm's processes. Members of other administrative departments with overlapping interests or information sharing needs should also provide input. Finally, the project leaders should sample a number of partners, associates, and legal assistants for feedback.

Assess the Process Workflow, Team Structure, and Data Issues

A review should encompass all activities at each process stage, the correlating micro-level inputs and outputs, and the available resources to fulfill these tasks. Efficiency gaps are often caused by a bottleneck at a process stage: a single step that takes more time to complete, a lack of resources to handle the volume of requests, or a series of steps that are not standardized and automated, for example.

Examining the duties of each conflicts and intake team member is a significant part of a review. Efficiency can be gained by better matching an individual's skills with the demands of a specific job. Firms will also be better prepared for the shifting of existing responsibilities and addition of new responsibilities that generally accompanies new software.

Most conflicts and intake databases contain incorrect data or duplicate information that can slow the conflicts clearance process and lead to costly mistakes. A review should also focus on validating data and standardizing the process for retrieving and recording future data – tasks that newer conflicts software make easier.

By assessing their conflicts and intake processes before vetting third party vendors and reviewing new software options, law firms will achieve a clearer understanding of their technology needs to make informed decisions. This updated information will, in turn, help vendors tailor their demonstrations of new conflicts and intake software—all of which should maximize a law firm's chances of selecting the right software.

Identify Existing Technology Integrations

Increasingly, manual process steps are being replaced by more efficient automated steps supported by technology. The increase in automation has allowed firms to share data and information among different software and systems including document management systems (DMS), enterprise resource planning (ERP) software, and client relationship management (CRM) software. Before selecting new conflicts software, firms should consider whether and how the technology will interact with their suite of existing software solutions.

Weigh Software Strategy

A vital step in selecting new conflict and intake software is deciding between a standard or a customized solution, both of which have inherent benefits and challenges.

Standardized software allows faster implementation, lower project cost, and the ability to fully realize any future enhancements. At the same time, this 'out-of-the-box' style software can be inflexible and unable to satisfy some of the firm's existing one-off process steps or respond to future demands.

Customizable software has a greater ability to meet a firm's specific needs and allows the firm to retain processes that are already familiar. However, this approach can require extra negotiations with vendors, additional costs, longer implementation timelines, and possible difficulty in integrating future software enhancements.

Conduct Vendor Due Diligence

When a firm takes the time to evaluate the strengths and weaknesses of its processes, pinpoint its needs and wants, and decide on a strategy for fitting process to technology or technology to process, it will be well-positioned to submit focused questions to prospective software vendors. Where possible, the firm should obtain written responses from the vendors to enable easier comparisons. Generally, law firms should contact three to five vendors and request a list of references. It is also helpful to communicate with peers at firms that have already migrated to newer conflict software and discuss their experiences.

An experienced advisor can provide law firms with ideas and recommendations for improving existing conflicts and intake processes and supporting firm technology and personnel. Leveraging insights from a specialist who has worked with law firms of diverse sizes and structures allows firms to take an objective view of their existing processes, identify any vulnerabilities or inefficiencies, and make informed decisions about updating these systems. Working with [a client-centric, vendor-agnostic expert](#) can help firms conduct the requisite due diligence and become more informed buyers.

Selecting the conflicts and intake software that is best suited for a law firm's individual needs will reap benefits not just for the firm itself, but also for the clients it serves.

To discuss any of the topics raised in this article, please contact **Stuart Poole**.