



Customer Success Story: Linklaters

Overview

Established in 1837, Linklaters is a global law firm which specialises in advising the world's leading companies, financial institutions and governments on their most challenging transactions and assignments. Linklaters' UK headquarters in the heart of the City of London, accommodates 2,500 staff working across four key practice areas: corporate, international finance, commercial real estate and litigation. With 30 offices in major business and financial centres in 22 countries, Linklaters goal is to deliver outstanding service of the highest quality to its clients anywhere in the world.

Some of Linklaters' high-profile projects include: the £7 billion public offer by Capital Management & Investment plc to acquire Six Continents plc, the £5 billion merger of Granada plc and Carlton plc to create ITV plc, the £2.5 billion acquisition of Scottish & Newcastle's managed pubs, restaurants and lodges business by a private equity consortium and the £1.01 billion sale of Goldfish credit card business by Centrica plc to Lloyds TSB plc.

Challenge

Previously, Linklaters document production process was managed manually using a 'paper job bag.' Created by Linklaters' legal secretaries, this held all the relevant legal documents associated with a case and would be transferred through the internal post system to the service desk to be physically moved between departments for examinations and amendments before being processed in one of the data centres.

Not only was this extremely time consuming but as the majority of the process was done manually there was a greater risk of errors being made. Also, as the data centre staff had no way of knowing what work was coming through the pipeline, it

Highlights

Legal

Processes Enabled:

- Document management and production integrated with EMC Documentum
- Online case management
- User feedback
- HR processes including work allocation to university interns and life insurance processing
- Data centre and lawyer collaboration

Customer Benefits & Results:

- Eliminated paper and manual routing
- Increased efficiency and control
- Increased visibility into case status and workload
- More accurate billing and capacity planning
- Increased lawyer productivity for greater revenue generation
- Seamless integration with SAP, Microsoft SharePoint, and Documentum

was very difficult to plan resourcing and budgeting so staff were often under utilised. Furthermore, a largely paper based system meant once documents had been submitted the legal team had no visibility of where in the process, making it impossible to track the progress of jobs. This was a problem because each document processed by the data centre has a chargeable value and it was impossible to demonstrate how much time was being spent on a document in order to charge this back to the client.

To realise greater efficiency across the business, and to give revenue-generating lawyers more visibility and greater control over document production, Linklaters decided to look at ways this process could be streamlined and automated. In evaluating the process, Linklaters also recognised an opportunity to standardise document production across all three data centres, reducing the associated technical administration and enabling Linklaters to better identify and utilise the specialist skills it has across the business, such as foreign languages.

Linklaters had already successfully implemented business process management (BPM) software from Metastorm on a small scale to provide an automated process for users to provide feedback on existing systems, so it was a natural choice to consider using a BPM solution to streamline document production.

"We had been doing some automation of processes using

SAP but it was not possible to do any real time integration and we found that it was not flexible or adaptable enough to meet the company's needs," explains Sam Rodgers business process consultant for SAP at Linklaters. "We chose Metastorm BPM after evaluating a number of vendors. We were particularly impressed by Metastorm BPM because of its ability to support the complete process lifecycle and integrate with our existing systems and applications such as SAP, Documentum and Microsoft Sharepoint. It was Metastorm's market leadership and vast experience in the legal sector that ultimately convinced us it would give us the best return on our investment."

Solution

Using Metastorm BPM software as the foundation, Linklaters created and implemented the TRACS tool to manage the creation and tracking of all documents. Integrated into Linklaters existing GLIDE site (Global Linklaters Integration Desktop Environment), TRACS enables anyone within the organisation to request a document to be created and amended. Employees complete a pre-built Metastorm BPM form which is accessed online through Microsoft SharePoint - the front end portal for the system. These are all single sign-on forms with Active Directory so once a user is logged onto the network they don't have to keep signing into the system. As the Metastorm BPM system is extremely light on the network, most forms take only two seconds to load and the intuitive design of the user interface makes it very quick and easy to use – there is only one question per page and the next question is influenced by the answer preceding it. Once the BPM form has been completed, the document is then automatically sent through the amendments process and can be tracked in various stages. The Metastorm BPM software has also been integrated with Linklaters document management software, EMC Documentum so documents can be scanned and referenced in Documentum and updated in real time.

"Metastorm BPM's agile and easy to support designer has enabled us to standardise all the interfaces across the process into one portal which can be managed centrally," explains Andy Page, a Linklaters consultant. "The system has been designed so that if any one part of the programme goes down, for example email, the flow of the process will not be affected, helping to improve productivity and further reducing the pressure on the technical team."

Results

Implementation of the Metastorm BPM system has been extremely smooth with very little disruption to the business and minimal training has been required to get staff up to speed. The first phase of the project to roll out the process to the London data centre went live in March 2007 and was closely followed by New York the following month. By May 2007 TRACS was also being used in the Hong Kong data centre.

"The biggest challenge in getting TRACS up and running was persuading staff that they needed to change," says Rodgers. "Once this hurdle was overcome everything else was very straightforward. Initial feedback from all those who have used Metastorm BPM has been very positive, even from those people who had been very resistant to the change. Linklaters is a very process focussed organisation so the potential for BPM here is enormous."

Metastorm BPM has had a dramatic impact on the way Linklaters manages the creation and tracking of documents across its entire business. The data from TRACS is collected in a central database. This business intelligence can then be used to capture the amount of effort involved in the creation of the document so it can be billed back to the client and predict capacity for the data centres, helping to reduce the reliance on its outsource partner in India. As the legal secretaries are now able to schedule a job in advance, the document production unit (DPU) has forewarning of any jobs in the pipeline. TRACS has also made it possible for Linklaters to identify people within the organisation who have specialist skill sets, ensuring that these skills are not under utilised and further reducing reliance on outsourcing.

Based on the success of the TRACS project, Linklaters plans to automate a further 12 significant business processes by the end of the year as well as a number of more minor processes. The modular design of Metastorm BPM means that everything Linklaters has learned from the processes already put in place can be very easily replicated for new processes and as Linklaters now has a standardised look and feel to all its forms training time is minimal.

Linklaters has already extended the use of Metastorm BPM to create SWAT – a Summer Work Allocation Tool. Each year Linklaters recruits 40 top level students from US universities for its summer internship programme. The students are split between Linklaters' London and US offices with a few going to Hong Kong. This summer Linklaters is using Metastorm BPM to automate the process for attorneys and lawyers to allocate

work for the students so that it can be managed centrally.

The next process to be automated will be the completion of all Partners' Life Insurance forms. To manage this annual process, Linklaters usually has to recruit an additional six people. Currently the whole process takes around eight weeks to complete, four weeks to prepare the paperwork and four weeks of chasing the partners to complete it. Once it has been automated with Metastorm BPM, it is hoped the time it takes will be dramatically reduced, and the need to take on additional staff eradicated.

“Metastorm BPM has enhanced productivity and collaboration across the firm, providing greater visibility and control over key information and giving fee earning lawyers immediate access to forms and information so key business processes can move forward without delay,” says Page, Consultant Linklaters. “Introducing the ability to monitor and track efficiency, has resulted in a big improvement in response times which has given us an edge over our competitors. The planned extension of Metastorm BPM to additional processes across the business will completely transform the way people work within the company.”

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