
Client Intake Manager

Improved Productivity and Collaboration with Reduced Risk!

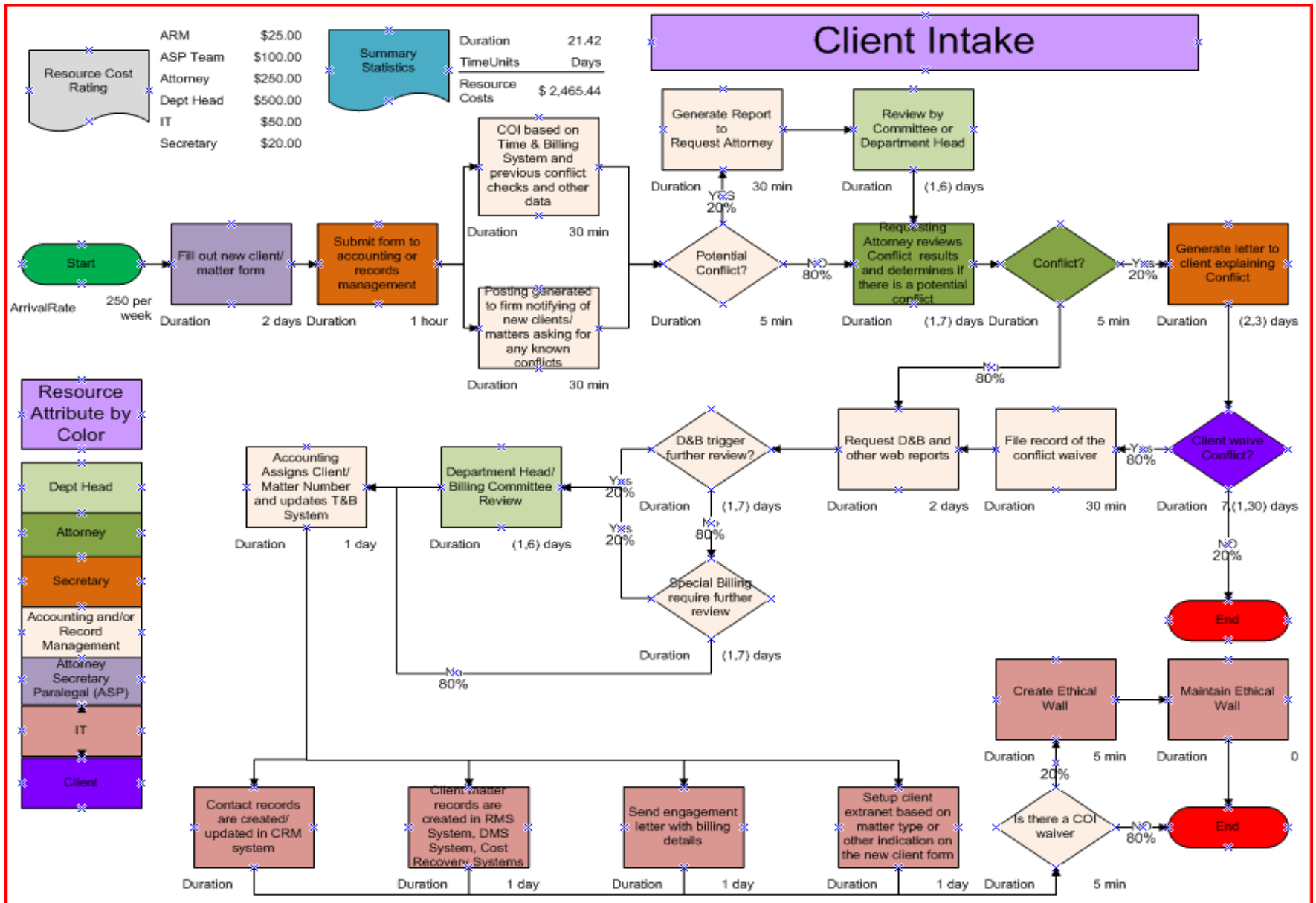
Challenges

- Accepting a new client or project is extending credit and incurring risk.
- Client on-boarding is often the first experience the customer has with your firm and can set the tone for the relationship.
- Multiple systems make compliance with internal policies, rules, procedures and applicable laws difficult.
- Duration is a risk because the intake process can be lengthy and attorneys will often times start to work on a matter prior to it being approved risking malpractice, time and expense write offs and resource allocation issues.
- If firms are tracking expenses such as phone, printing or copies items will often be charged to an administrative number prior to completion of client intake and frequently never properly billed
- As Mergers and Acquisitions continue and lateral hires are brought in to a partnership there can substantial time and cost savings as all existing clients and matters for the target must be run through the new client process.

Best Practice Client Intake Manager Checklist

- Are all intake documents complete and accurate?
- Has budget been set aside and agreed to by the client?
- Can the client pay for the service?
- Is a retainer or prepayment warranted?
- Do we have resources available?
- Have we done this type of work before?
- Is the client litigious?
- Is there a conflict in doing business with the client?
- Can we meet their security & reporting requirements?
- Have conflict resolution procedures been documented?

Current-state Client Intake Process Flow



Current State Client Intake Performance

ProcessView			
Type	Transactional	Process Time	0.97
Time Units	Days	Total Queue Time	4.28
Hours Per Work Period	8	Cycle Time	5.25
Work Periods Per Day	1	Duration	21.42
Days Per Week	5	Utilization	90%
Activity Nodes	24.00	Service Level	28%
Start Nodes	1.00	Takt	0.56
End Nodes	2.00	Demand	1.80
Paths	42.00	Arrival Rate	1.80
Sequential Steps	19.00	Minimum WIP	9.45
Decision (OR's)	8.00	Resource Cost	\$ 635.02

Resource	Cost
ASP Team	\$400.00
Secretary	\$22.00
Attorney	\$83.33
ARM	\$48.68
Dept Head	\$68.20
IT	\$12.80
Client	\$0.00

Resource	Minimum FTE	Time	Rate	Cost
ASP Team	0.90	0.50	\$ 800.00	\$ 400.00
Secretary	0.25	0.14	\$ 160.00	\$ 22.00
Attorney	0.07	0.04	\$ 2,000.00	\$ 83.33
ARM	0.44	0.24	\$ 200.00	\$ 48.68
Dept Head	0.03	0.02	\$ 4,000.00	\$ 68.20
IT	0.06	0.03	\$ 400.00	\$ 12.80
Client	-	-	\$ -	\$ -
Total	1.75	0.97	\$ 1,080.00	\$ 635.02

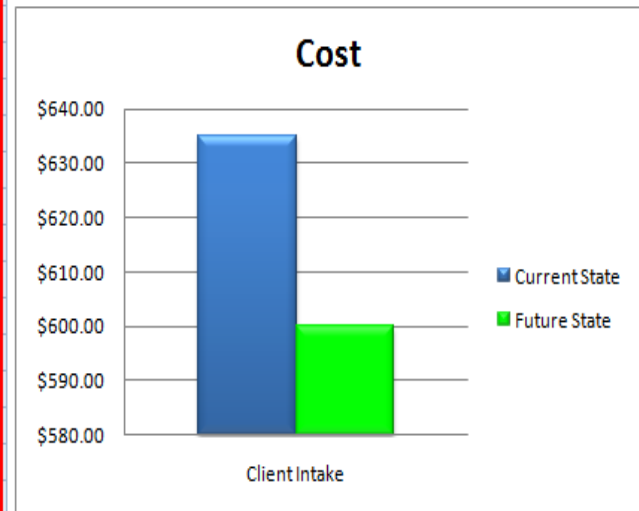
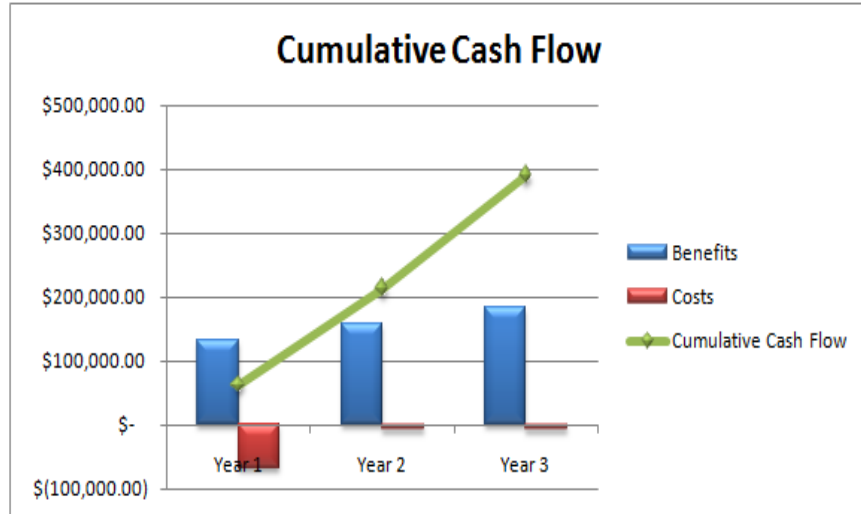
Client Intake Manager Savings Estimates

	Current State			Future State			% Savings			Annual Savings		
	Process	Duration	Cost	Process	Duration	Cost	Process	Duration	Cost	Year 1	Year 2	Year 3
Client Intake	0.97	21.42	\$635.02	0.50	15.00	\$600.00	48%	30%	6%	\$ 131,325.00	\$ 157,590.00	\$ 183,855.00
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Time Units are in Days

	Year 1	Year 2	Year 3
Benefits	\$131,325.00	\$ 157,590.00	\$ 183,855.00
Costs	(\$69,250)	(\$6,750)	(\$6,750)
Costs per Attorney	\$ 2,770.00	\$ 225.00	\$ 192.86
Net Cash Flow	\$ 62,075.00	\$ 150,840.00	\$ 177,105.00
Net Cast Flow/Attorney	\$ 2,483.00	\$ 5,028.00	\$ 5,060.14
Cumulative Cash Flow	\$ 62,075.00	\$ 212,915.00	\$ 390,020.00

Payback Period on Initial Investment: **6.00** Months



Assumptions	Annual Demand			Assumptions	
Client Intake Activities	Year 1	Year 2	Year 3	Client Intake Solution Costs	
Number of Attorneys	25	30	35	Software	\$42,500
Client Intake per Attorney	150	150	150	Services	\$20,000
				Maintenance	\$6,750
				Year 1 Costs	\$69,250
				ROI Calculation	
				Benefits begin accruing immediately.	

* Intake Team composed of Attorney, Paralegal and Secretary

Anticipated Benefits – Process & Culture

ID	Process	Improvement Description	Benefits	Technology Leveraged	KPI Impact(s)	Affected Stakeholders
1	Collaboration-related efficiencies	Tracking people and information	<ul style="list-style-type: none"> Improved tracking down people and information processing time 	BPMS Suite, SQL Server, and Windows SharePoint Server	<ul style="list-style-type: none"> 20 minutes per employee per day non-billable time returned 	<ul style="list-style-type: none"> Attorney Secretary Paralegal Dept Head
2	New Matters Automated Forms	Enter new matter easily, accurately and once	<ul style="list-style-type: none"> Automatically forwarding forms to internal departments for review and validation 	BPMS Suite, SQL Server, and Windows SharePoint Server	<ul style="list-style-type: none"> 500 hours of administrative time annually eliminated \$2,000 each year reduction in photocopy costs 	<ul style="list-style-type: none"> Attorney Secretary Paralegal Dept Head
3	Client Service	Single place to find and share information	<ul style="list-style-type: none"> Speak intelligently and accurately about a client's case 	BPMS Suite, SQL Server, and Windows SharePoint Server	<ul style="list-style-type: none"> Improved client satisfaction Repeat/Referral clients 	<ul style="list-style-type: none"> Attorney Secretary Paralegal Dept Head
4	More Automated Processes	Least 30 other paper-bound processes	<ul style="list-style-type: none"> Net small amounts of time adds up to huge time savings 	BPMS Suite, SQL Server, and Windows SharePoint Server	<ul style="list-style-type: none"> Decrease in administrative time Reduction in non-billable cost 	<ul style="list-style-type: none"> Attorney Secretary Paralegal Dept Head