



Project Leadership Associates and Hinshaw & Culbertson Release New Business Intake Solution

Monday, November 14, 2011 – Project Leadership Associates (PLA) and Hinshaw & Culbertson LLP 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, PLA and Hinshaw 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, a Partner in Hinshaw’s Lawyers for the Profession® Group and an industry recognized leader, 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.”

For more information about the NBIS, please view the [brochure](#) or contact Dan Safran or Anthony E. Davis:

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About Project Leadership Associates, Inc.

Project Leadership Associates is a business and technology consulting firm that empowers small, middle market and enterprise organizations with services across four core solution groups: 1) Strategy & Execution; 2) Business Operations; 3) Applications and 4) Infrastructure. With headquarters in Chicago and branch offices in Houston, Milwaukee, New Orleans, New York and San Francisco, PLA is uniquely poised to offer a broad array of solutions that work collaboratively with clients to help them realize substantial results. For more information visit us at www.projectleadership.net

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.