

Case Study

The Quest for Request Management



How an AmLaw 100 Law Firm
doubled its efficiency



The Client

THE CLIENT IS AN AMLAW 100 LAW FIRM WITH MORE THAN 1,000 ATTORNEYS IN MULTIPLE GLOBAL OFFICES AND SERVES CLIENTS WORLDWIDE.

With most companies still dealing with a virtual work force, coordinating how to manage any type of request efficiently has become a critical issue. The implementation of Quest, request management system, doubles its efficiency across this remote working administrative team.

Summary

- Office closure and migration to work from home model demanded a more efficient administrative services workflow
- Poor tracking and reporting on the 150+ daily requests each with varying degrees of urgency, importance, and confidentiality
- The firm's information services group uses TRG Screen's Quest to manage the tens of thousands of enquiries and requests it receives annually
- After a recommendation, demo and consultation, the director of administrative services considered Quest the best solution to meet the department's – and firm's – needs
- Notable impacts include increased efficiency, peace of mind, valuable reports and metrics, and integration with time tracking and billing system
- In the coming months the firm plans to utilize Quest to manage enquiries and requests for additional departments, including its fast-growing document retrieval team

The Challenge

LIKE MANY ORGANIZATIONS, THE GLOBAL PANDEMIC FORCED THE FIRM TO CLOSE THEIR OFFICES IN THE SPRING OF 2020 AND SEND THEIR STAFF HOME TO WORK REMOTELY. THIS NECESSITATED THE FIRM TO FIND A BETTER WAY TO MANAGE THEIR ADMINISTRATIVE SERVICES WORKFLOW.

In the past, when attorneys needed administrative support, such as word processing, they sent an email request to a regional shared inbox. This old-school shared inbox approach simply didn't work when the firm went remote and staff could not access or manage requests from the shared inboxes.

In addition, the firm's director of administrative services had no automated way to track, allocate and resolve the 150+ daily requests, each coming with varying degrees of urgency, importance, and confidentiality.

A complete lack of visibility and control over workloads as well as an inability to view metrics and run reports often meant work was not assigned appropriately or fairly, and in some instances, critical requests fell through the cracks.

The solution

BEFORE THE PANDEMIC, THE FIRM'S INFORMATION SERVICES GROUP HAD IMPLEMENTED QUEST, A COMPREHENSIVE REQUEST MANAGEMENT SYSTEM, TO MANAGE THE TENS OF THOUSANDS OF ENQUIRIES AND REQUESTS IT RECEIVES ANNUALLY FROM ATTORNEYS AND OTHER STAFF.

With Quest, the team is able to ensure every request gets appropriate attention, according to priority and value. In addition, the director of information services is able to run reports on the volume of queries and the value the team has added through their expert services.

Knowing that her colleague who oversees administrative services for the law firm was seeking a solution to manage the administrative services workflow, she recommended he learn more about Quest.

After a demo and discussions with the Quest team at TRG Screen, the firm's director of administrative services was sold that Quest was far and away the best solution to meet his department's – and firm's – needs.

Quest functionality includes:

- Automated workflows through event-based business rules
- Integration with time tracking and billing systems
- Management of team calendars and working hours
- Automated response to frequently asked questions via a proprietary response bot

Quest, A Comprehensive Request Management System

Designed specifically for law firms, Quest is a comprehensive workflow management system tailored for groups dealing with a high volume of enquiries and requests. It provides out-of-the-box tools to streamline and optimize workflows with a multitude of configuration and customization options. Visual dashboards provide complete transparency and control over every departmental workstream, such as administrative services, information services, etc. The solution allows organizations to easily improve efficiency and securely track, prioritize, allocate and resolve requests, even across remote teams. Requests are immediately routed to the most appropriate team or individual with clear accountability and ownership.

The result

SINCE IMPLEMENTING QUEST IN MID-2020 THE DEPARTMENT AND FIRM HAVE BENEFITTED IN A NUMBER OF IMPACTFUL WAYS, INCLUDING:

- **Increased efficiency:** Thanks to smart routing of requests and the visual dashboard that allows the admin pool and the department's managers to easily track and manage requests through completion, the **director of administrative services estimates his department is at least 2 times more efficient.**
- **Peace of mind:** Powerful calendar management functionality combined with smart routing means requests are never routed to an absent staff member, so **requests no longer fall through the cracks.**
- **Valuable reports and metrics:** Before deploying Quest, the department had no ability to track or report on requests. With Quest, the team has **actionable metrics with real-time visibility via a dashboard**, and the department's director can report monthly to the business on the volume of requests.
- **Integration with time tracking and billing system:** Because Quest integrates with the firm's time tracking and billing systems, **admins no longer have to make double entries in multiple systems** to capture and recoup billable costs.

Director of administrative services: “Should our firm return to our pre-pandemic model of working entirely in the office or even move to a hybrid model where our people work remotely some of the time, we will never go back to our former process for handling requests. Quest has helped make us so much more efficient and enabled us to dramatically up level our service and value to the firm.”

Based on the results the firm has enjoyed since deploying Quest for its information services team and subsequently for its administrative services group, in the coming months it plans to utilize Quest to manage enquiries and requests for additional departments, including its fast-growing document retrieval team.

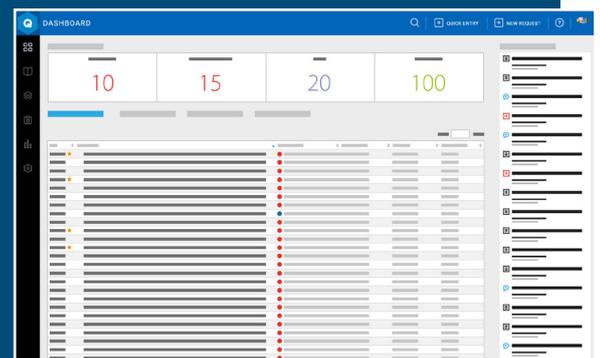
Once Quest is implemented for one department within an organization, there is minimal cost to add another department, and fixed costs, e.g., hosting fees, can be shared.

How it Works

Because Quest integrates seamlessly with the firm’s existing email system, when an attorney needs administrative assistance, they simply send an email to the selected email address, and it is smart routed by Quest to the appropriate admin based on pre-established custom business rules.

For example, if the request is from an attorney in the intellect property (IP) practice, it can be automatically routed through Quest to an available IP information specialist. The requesting attorney follows the same request submission process as when before the firm had Quest, thus there is no need to change a requestor’s behavior and not required to learn how to use a new software application.

The Quest administrative team has visibility on the entire process of the request, from submission to assignment to completion via the Dashboard. Managers in the administrative services department are able to set notifications to ensure tasks are completed on time, even if an admin is unavailable or the request comes in outside of normal business operations.



About TRG Screen

TRG Screen is the leading provider of software used to monitor and manage subscription spend & usage across the entire enterprise.

TRG Screen is uniquely positioned to offer the full spectrum of enterprise subscription management capabilities across:

- Spend management – Optimize Spend (inbound licensing)
- Usage management – ResearchMonitor (online resources), DART (terminals) & XMon (data feeds)
- Enquiry & workflow – Quest
- Exchange compliance & reporting – AXON
- Revenue management – INFOMatch (outbound licensing)
- Specialist consulting services, managed services & events

TRG Screen is differentiated by its ability to comprehensively monitor both spend on & usage of data and information services including market data, research, software licensing, and other corporate expenses to optimize enterprise subscriptions, for a global client base.

TRG Screen's clients realize immediate ROI and significant long-term cost savings, transparency into their purchased subscriptions, workflow improvements and a higher degree of compliance with their vendor contracts.

Our global client base consists of more than 750 financial institutions, law firms, professional services firms and other blue-chip enterprises that jointly manage more than \$8.5 billion of subscription spend using TRG Screen's software solutions.

TRG was founded in 1998 by a group of financial technology executives passionate about helping firms manage their high value data subscriptions.

In October 2016 TRG acquired Priory Solutions adding powerful usage tracking solutions to our portfolio of solutions.

We further strengthened our position as a market leader in enterprise subscription spend management when TRG acquired Screen Group in January 2018.

In June 2019 AXON Financial Systems, the leading provider of exchange policy and compliance solutions, joined the TRG Screen family. The combined TRG Screen business provides a truly unique global offering.



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