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InOutsource

Automating Audit Response Letter Workflows in the Cloud

goulston&storrs



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Goulston & Storrs is an Am Law 200 firm with nationally ranked practice areas in real estate, bankruptcy, corporate, trusts and estates, and environmental law.

In 2020, recognizing the opportunity to streamline an outdated internal process, the firm decided to explore better ways to handle client audit response letters. In a typical year, the firm was receiving up to 270 client audit inquiry letters, with most activity occurring between the months of January to April.

Attorneys are required to provide their clients' auditors with the information they request prior to the issuance of their clients' audited financial statements. For firms such as Goulston & Storrs, where each client could involve dozens or even hundreds of attorneys, the process of compiling a response letter is complex.

Like many law firms, Goulston & Storrs found that the process had become too administratively intensive and burdensome, requiring manual tracking and follow-up on the part of members of the team, and too much interruption and overhead for attorneys.

Auditing the Audit Letter Process

The firm was no stranger to applying technology to workflow challenges; the team had been using a custom-built system to manage audit response letter requests for six years. Built on an aging systems and maintained for years by a resource no longer with the firm, the tool was inflexible and often went offline unexpectedly. No longer fit for purpose, it required more manual intervention and management than a modern workflow solution should.

"We had a home-grown application that constantly required IT support, and the process wasn't efficient," says Fadi Kalach, Data Architect, Goulston & Storrs. "The reporting coordinators spent a considerable amount of time emailing users, following up, and assembling letters manually."

The process was decentralized, with reporting coordinators managing client audit inquiries and response through email.

Working together, key stakeholders at the firm developed and submitted a project proposal, including business justification, to the firm's innovation committee, requesting budget for a new system which would automate the workflow for audit response letter requests.

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“At Goulston & Storrs , we have a culture that encourages innovation and improvement. Our audit response letter initiative was a great example of how a good idea could get off the ground quickly, for the benefit of the firm and our clients,” says Andrew Mulcahy, Director of IT Solutions, Goulston & Storrs.

A Key Ingredient — Modern Workflow Software

Having adopted the cloud-based Intapp OnePlace for Risk & Compliance for new business intake and conflicts management, Goulston & Storrs knew that it already had a technology platform in place that could be extended to meet this new opportunity.

Intapp OnePlace includes Intapp Workflow Automation, which provides tools and services for connecting firm applications, data sources and processes.

Goulston & Storrs was already familiar with its capabilities, which IT had previously deployed to address tailored workflow and reporting objectives for its client value team.

“Our vision is to migrate infrastructure from on-premises to the cloud and decommission obsolete servers and applications. Adopting Intapp as a cloud-based solution falls in line with that vision. With confidence in the Intapp platform, and partnering with InOutsource, the project was an instant success,” says Mulcahy.

“Our cloud-first strategy has paid off since the onset of the global pandemic, with renewed enthusiasm for technology that makes us more mobile and efficient. Automating additional workflows using Intapp OnePlace was a logical next step,” he adds.

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Working with InOutsource

With a clear argument for enhancing an internal process, while getting more ROI out of an existing investment, the team's proposal was approved by the technology committee in December 2020.

In early 2021, the Goulston & Storrs team met with InOutsource, a leading Intapp services provider and law firm risk consulting specialist. The meeting allowed Goulston & Storrs to evaluate InOutsource's solution, built on Intapp Workflow Automation, for automating the audit response letter process, and to learn more about the organization's consulting expertise, consulting approach, and record of working with other firms.

After deciding to engage InOutsource to tackle the audit letter project, the two teams worked collaboratively on the design phase.

"It was great experience working with InOutsource. They really listened to what our team had to say. Even when we identified new challenges or flagged fresh technical or process issues to overcome, there was no pushback. InOutsource was always focused on working with us to find solutions," says Kalach.

Pulling Data from Aderant Into the Cloud

One technical challenge they encountered was extracting data in real time from their Aderant financial system, which is on premises, to the Intapp Cloud. For each timekeeper, the Goulson & Storrs team wanted to be able to display detailed information about how much time each person had spent on every client and matter. That information was available in Aderant, but connecting that local system with the cloud required some collaborative innovation.

"The Intapp Integration Services, IIS, uses Boomi as its underlying platform," explains Chris Parise, integration and development specialist, InOutsource. "Boomi has the concept of 'atoms,' which are lightweight, dynamic runtime engines that house the defined components of a defined integration. And the way that system works, the cloud Boomi tenant can only talk to cloud Boomi atoms.

"So we had a situation here which required a double hop for pulling on-premises data from Aderant and getting it to the cloud — a direct connection wasn't possible, so we had to get creative. To do that, we worked with the Goulston & Storrs team to configure a solution that made it possible for that data to move across systems."

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“That involved having the Intapp cloud software call an on-premises integration that then invoked a database view. That view delivered client, matter, and timekeeper information in a form and format within a staging location accessible for routing back to the cloud.”

In designing and building this solution, InOutsource acted as an advocate for Goulston & Storrs within Intapp, to ensure that the integration would work as planned.

Throughout the integration phase, InOutsource performed many iterations of testing, with the Goulston & Storrs team providing regular feedback using a workflow provided by InOutsource. To keep the project on track, they met on a weekly basis to go through issues, most of which were tracked in Smartsheets and fixed on the fly.

Once testing was complete, with QA concluded and a go-live approved, the new audit letter workflow solution was pushed into production. Goulston & Storrs opened access to the system to a pilot group at first, and then rolled out more broadly with assistance from a training consultant.

Positive Response

All the feedback received from the program management office was positive. In a follow-up meeting six months after the initial deployment, the IT team met with the Director and reporting coordinators, who found that many of the manual steps carried out in the old audit letter process had been eliminated. Unlike the old software, the team has found Intapp’s solution to be stable, with no downtime reported.

In addition, the new process has made it easier for attorneys to respond to audit response letter requests. Now they can easily respond to queries from their phones, which has proved to be a convenient and popular way of interacting with the audit letter process.

“What was a painful manual process for our coordinators has been streamlined, all while modernizing our technology, providing mobility, and creating efficiency,” says Mulcahy.

“We are also seeing much faster response times for our attorneys, who find it much easier to react to queries when prompted through notifications in the workflow,” he adds.

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“It was a joy to work with InOutsource and we benefitted significantly from their experience with and understanding of both the nuances and complexities of the audit letter response process and the Intapp technology stack. Their responsiveness to our queries and their approach to problem-solving has made this a positive experience for our firm,” says Kalach.

Moving forward, the IT team at Goulston & Storrs is confident that maintaining and upgrading the system will be smooth and sustainable.

“Unlike our previous system, we no longer rely on one internal expert with specialized knowledge of the idiosyncrasies of a custom-built system. With our audit letter solution now in the Intapp cloud, updates are applied on an ongoing basis, up-time is guaranteed, allowing us to focus on our business goals,” adds Mulcahy. ●

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