



# ikaun Transforms Am Law 10 Firm's Experience Management with Cloud-Based Firm Directory

## Background: ikaun Firm Directory Centralizes Firm's Experience Data

Like many large, geographically dispersed firms, this Am Law 10 firm was challenged to efficiently locate essential information regarding their own experience including specific attorney experience or jurisdictions, staff with niche skills, locations of the firm's notaries, billing experts by office, and more. As is often the case, this was because the firm's experience information was not centralized, but dispersed across a variety of platforms leaving "pardon the interruption" emails as the de facto, though disruptive and inefficient, method for identifying such information for a variety of essential business needs.

In 2018, the firm selected ikaun's firm directory to create a centralized and searchable data warehouse of all the firm's experience to eliminate inefficiencies and "pardon the interruption" nuisances and create a culture of self-service access to the right information. ikaun's firm directory pulls data from the firm's internal warehouse as well as all people data on a nightly basis ensuring accuracy of experience and expertise in real time.

## Challenge: Migrating Firm Directory to the Cloud

ikaun's firm directory was exceptionally well received firmwide—so much so that in 2018, ikaun was awarded the firm's prestigious 2018 Technology Partner of the Year.

In 2022, firm leadership steered towards a leading-edge, cloud-first strategy and developed a roadmap to bring all systems into the cloud. Based on the relationship and strength of the existing on-premise version of Firm Directory, the firm selected ikaun as one of its preferred providers and Firm Directory to be one of its first platforms to take to the cloud.

ikaun's cloud based firm directory provides the firm with the multitude of general benefits of the cloud such as automatic updates and upgrades and reduced operational expenses. On top of these, the cloud version of Firm Directory promised a variety of enhanced features, including the ability to perform very complex searches and filters based on keywords, accelerated problem resolution, an upgraded and more aesthetic user experience.

The firm was particularly eager, however, to leverage two new features of the cloud Firm Directory: the platform's organizational chart visualization and attorney availability. Firm leadership identified the org chart visualization as key in helping to clarify the firm structure, who the important players are, where they sit in the firm, and gain quick insights into who reports to whom and who the assistants are.

The potential of associate availability, on the other hand, had a direct impact on firm revenue as it provided the opportunity for associates to come into the platform and report on their availability. The platform then automatically would update partners or the managing partner in a concise way who is available, related bar admissions and experience and gives leadership an opportunity to more quickly place associates on available billable work.

## Challenges:

- ✓ **Dispersed Experience Information:** The firm's data was spread across multiple platforms, making it difficult to access key information such as attorney experience, niche skills, and firm locations.
- ✓ **Reliance on Inefficient Methods:** Professionals had to send "pardon the interruption" emails to locate expertise, leading to inefficiencies and disruptions.
- ✓ **Cloud Migration:** The firm needed to migrate the existing on-premise directory system to the cloud as part of its cloud-first strategy.
- ✓ **Security and Customization Requirements:** The platform needed to comply with strict security protocols and align with the firm's branding and design guidelines.

## Solutions Powered by ikaun:

- ✓ **Centralized Data Warehouse:** ikaun's firm directory centralized all experience-related information, allowing for easy, self-service access and eliminating the need for disruptive emails.
- ✓ **Seamless Cloud Migration:** ikaun's integration agent architecture enabled the firm to transition to the cloud quickly and efficiently, without extensive customizations or code rewrites.
- ✓ **Enhanced Features in the Cloud:** The cloud version offered improved search capabilities, a better user experience, and key new features like organizational chart visualization and associate availability tracking.
- ✓ **Collaboration with Security and Design Teams:** ikaun worked closely with the firm's security and architecture teams to ensure compliance with security protocols and alignment with brand aesthetics.



The migration to the cloud was simple and seamless as a result of ikaun's integration agent architecture which essentially allowed the firm to leverage their on-premise data and very efficiently and securely publish that content to their dedicated instance of ikaun in the cloud without having to go through any significant customizations and writing of code to get the data in place in less than six months.

A significant portion of the implementation was meeting the rigor and process of complying with the firm's security reviews and architecture board. The ikaun platform is highly configurable to the user, and so the ikaun implementation team extensively collaborated with the review board at the functional perspective, listened to influencers on the design direction, and incorporated the firm's design guide, to ensure the ikaun platform was a reinforcement of the firm's brand, including font and coloring requirements.

## Results:

The rollout from the firm's perspective, was the cleanest, most well received rollout of software that the firm has ever experienced. Within the first 24 hours, the ikaun team had around 4200 users hit the system, stress testing the firm's specific tenant with a large number of concurrent users to ensure that, when there was a usage spike, the resources allocated and provisioned for the firm's instance were sufficient and really beyond what they needed.

Search has been transformed. Professionals firmwide are able to leverage simple to highly complex searches and find the right experts or professionals in an instant, able to quickly visualize the reporting structure and to more quickly direct questions and engage with the right people for solutions to simplify the day-to-day and move work forward seamlessly. And managing partners for the first time are able to see--at the touch of a button--which professionals at their firm are available and with what expertise, giving a much needed and powerful boost to overall productivity and the firm's bottom line.

At the end of the migration the firm commented, "ikaun is an exceptional partner that we rely on every day to provide a critical function for our firm. The expertise and experience is the lifeblood of the firm, and with ikaun every professional at the firm has world class, self-service access to it--and that's a game changer."

“

ikaun is an exceptional partner that we rely on every day to provide a critical function for our firm.

The expertise and experience is the lifeblood of the firm, and with ikaun every professional at the firm has world class, self-service access to it--and that's a game changer.

”

*Am Law 10 Firm*



## About ikaun

ikaun is a world-class experience management platform for the professional services industry. Built based on the needs of business development, marketing, and knowledge management, ikaun offers a unique solution for streamlining how experience is discovered, shared, and reused by business development and fee earners.

