

## Our Team of Experts

The InOutsource team serves clients as unbiased resources in merger readiness consulting, records and information management consulting, project management, software evaluation and implementation, and policy and procedure development.

We are dedicated to staying ahead of the curve on developments that will impact how law firms manage information. Several team members are Certified Records Managers, an accreditation awarded by the Institute of Certified Records Managers to a limited number of highly qualified individuals who have demonstrated they meet specific industry skills and knowledge. We are active members of several professional trade associations, and are frequently asked to speak and write on topics related to conflicts management, client confidentiality, records retention, and information management in law firms.

## About InOutsource

InOutsource was formed in 2002 in response to a recognized need for objective records management consulting and project management support in law firms. The experts at InOutsource saw that law firms were challenged with how to best update records and information management practices given rising costs, new technologies, and risk management issues, and developed a methodology for addressing all aspects of records and information management. Our years of experience consulting with the nation's top law firms have led us to helping them as they prepare for and execute a growth strategy.

# INOUTSOURCE

Merger Readiness Consulting Services

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# INOUTSOURCE MERGER READINESS CONSULTING SERVICES

## Growth Through Mergers and Acquisition

Your firm has already decided that to stay competitive in the marketplace and continue to serve existing clients, the firm must grow through merging with or acquiring firms and recruiting lateral talent.

At InOutsource, we understand the enormous pressure a merger puts on your firm. Not only do you need to continue with business as usual while keeping discussions confidential, you also need to devote time to the due diligence and planning required for a successful merger.

Before beginning merger discussions, your firm must have the framework in place to perform conflicts due diligence and address issues that will arise.

InOutsource's Merger Readiness Consulting Services can help – before, during and after a merger.

## Merger Readiness

To ready your firm for a merger, our experts can be on hand to strengthen your infrastructure to support a growth initiative. We will:

- Audit your current systems and processes for performing conflicts due diligence
- Establish standards and procedures for new matter intake and conflicts identification and resolution, including:
  - Implementation of processes and technology to close inactive matters

- Review conflicts database to ensure it contains adequate information about current and closed matters
- Analyze lateral attorney work history to determine if potential merger client matters present a business or ethical conflict
- Evaluate and clean up data in conflicts database to streamline conflicts identification, reporting and resolution
- Ensure the firm has an infrastructure to implement ethical and business screens to comply with waivers and to protect sensitive or confidential information
- Create a plan to confidentially perform conflicts due diligence and analysis
- Evaluate and train staff who will be working on merger due diligence processes

## During a Merger

Once your merger has been announced, our work does not end. InOutsource can work with one or both merging firms to:

- Evaluate existing systems to determine what will be used after the firms have merged
- Identify applications that are not in place but will be needed to support the technology infrastructure of merged firms
- Establish a process and proprietary technology platform to ensure client confidentiality is not breached while obtaining the necessary waivers from clients
- Develop a plan to communicate to attorneys and clients the benefits of the newly merged firm.

## After a Merger

Once the firms have successfully merged, our experts will continue to work to ensure the successful execution of the established procedures and systems. We will:

- Integrate new business intake workflow, conflicts, records management systems, people and processes
- Assess staff and train them on new procedures
- Assist with managing the ongoing conflicts as they are identified, including establishing a process to ensure that required client waiver letters are obtained
- Develop a plan to manage expectations and ensure user adoption and compliance with new systems.

To discuss your firm's plans for future growth and its current status as it relates to merger readiness, call the experts at InOutsource.

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