

CUATRECASAS

Discovering a unique path to higher productivity

Reducing unproductive time by automating business processes

With a team of more than 1200 people (800 lawyers), Cuatrecasas is one of the leading legal firms on the Iberian Peninsula specialising in the various areas of business law. By associating commercial legal practice and litigation with financial and tax practice, Cuatrecasas offers their clients comprehensive legal advice with a special emphasis on personalisation and results.

Cuatrecasas has offices in major Spanish and Portuguese cities as well as in Brussels, New York, Paris and Sao Paulo.

The trust that the clients place in Cuatrecasas enables them to accommodate their needs, offer advice, defend their interests, and provide proximity through the Cuatrecasas network of offices. Cuatrecasas offer their services through a solid network of integrated offices, providing cooperation, knowledge and know-how with the "single office" system.

The development of office automation and knowledge management technology provides the possibility of substantially improving traditional management tools and complementing the intellectual work of the attorney. Cuatrecasas are committed to using the latest technology, as all professionals have access to current-generation computer and multimedia resources, ensuring efficiency and flexibility.

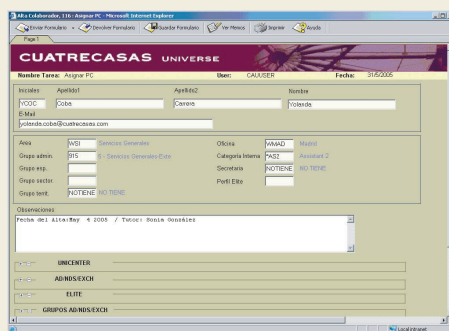
To further improve efficiency and effectiveness of the company, Cuatrecasas started investigating into solutions that would help them not only to optimise their business processes, but also to automate them. Their aim was to reduce lag time, improve responsiveness and increase transparency. As Business Process Management is a perfect fit to achieve these goals, they evaluated solutions from different vendors.

After extensive research, Cuatrecasas selected Ultimus as their Business Process Management solution since it has a powerful forms designer and graphical design environment, allowing for fast and efficient synchronisation of the OrgChart with Active Directory and perfectly supporting the Microsoft System Architecture Cuatrecasas have in place. Due to the completeness and quality of the product, they were convinced the solution would be capable of handling all their present and future requirements.

In fast growing companies and large enterprises, human resources account for most inefficiencies in administration as these processes are often not very transparent and traceable and therefore have a very large potential for improvement. Broken flows within the set up process for new hires cause frustration, inefficiencies and prevent, for

example, newly hired employees from being productive from the start due to missing login information, computers, telephones, etc. Also in terms of, for example, vacation requests much potential for optimisation of human resources processes is feasible.

The IT department was therefore the key driver of process definition and automation as they realised the large benefits regarding greater efficiency, standardisation and quality assurance. The move from internal vertical IT systems integration to the global direction of horizontal processes was used by Human Resources aiming to standardise the new employee process. They started off with the



The screenshot shows a web-based application window titled 'CUATRECASAS UNIVERSE'. It contains a form for entering employee information. Fields include 'Apellido' (Last Name), 'Nombre' (First Name), 'Email', 'Cargo' (Position), 'Area' (Area), 'Grupo admin.' (Admin Group), 'Grupo info.' (Info Group), 'Grupo legal.' (Legal Group), 'Observaciones' (Observations), 'CATEGORIA INTERNA' (Internal Category), 'Secretaria' (Secretary), 'PUESTO' (Position), and 'NOTIFICAR' (Notify). There are also buttons for 'GUARDAR' (Save) and 'BORRAR' (Delete).

Cuatrecasas decided to use Ultimus also due to its powerful forms designer and graphical design environment.

new employee process with the goal to have everything set up in time, improve coordination between all tasks required for setup and have access to status information at any time. Without a proper process automation system in place, new starters would have to be added manually to every system they would be involved with, which used to be particularly time-consuming. Therefore, application integration and maximum automation was the main requirement, integrating Ultimus with META4, their HR Application, Hummingbird DM, their document management system, ELITE Enterprise, their Marketing and Contacts Module, and Unicenter, their service desk application.

New Employee Process - Solution Description

Once a new employee is hired by Cuatrecasas, their personal information is entered into the system and a process is started. This then kicks off a number of parallel flows that manage the set up of the new user in the various systems, the assigning of computers, telephones, working space and a secretary to the new hire. Another flow manages that different departments are notified about the new employee. Once all steps are taken, the process comes to an end and the employee is ready to start working on the first day.

Moreover, the HR department is now aware of

the status of the various procedures at any time and is therefore assured that everything will be ready at the first working day of the new employee. At the same time, manual errors are eliminated, since plausibility checks are included and synchronisation with the various applications is conducted automatically without human interaction. In case of overdue steps, a notification is sent out that allows employees to be aware of any unforeseen events.

Especially for the new employee process, the big challenge Cuatrecasas was faced with was its horizontal complexity. To overcome the challenge of having to synchronise data coming from several people, departments and organisational units, there was a need for application integration with Ultimus. This could be easily performed with the help of either the respective application's standard Web Services (as in the case of ELITE) or inhouse developed Web Services.

Ultimus' ability to define responsibilities and to facilitate coordination across parallel flows and different levels of the Cuatrecasas' organisational structure has proven very useful



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with regard to its integration capability with their HR system META4. For example, one part of the new employee process was the integration between META4 and the Ultimus OrgChart so that the new employee is immediately a new user and part of the

OrgChart. In this case, the use of the Ultimus OrgChart enables faster process design, better coordination between departments and optimisation of process lag times. Another important integrational aspect was the Ultimus' interfacing with Cuatrecasas' single-sign-on portal in order to simplify user authentication so that they are recognised within all their systems.

Apart from fully integrating and automating the new employee process, another critical aspect was to implement additional rules to manage special conditions and errors. Thereby, the integration code is configured so that it sends a notification to Ultimus whenever an error occurs. By giving exact information about what exactly failed, Ultimus then notifies the user who then has the opportunity to correct the error manually. Sending and receiving notifications through Ultimus therefore allows for fast and efficient information and correction management of errors and special conditions.

Not only for the new employee process but especially for the vacation process, Ultimus' capability to interact with external applications was extremely important. The automatic launch of the workflow from an external application (for example META4) and the notification capabilities via email (integrated with MS Outlook) was crucial, especially for the assignment of tasks within the new employee process. As far as the vacation process is concerned, this capability proved even more useful as it is launched from a web page of HR services and moves through policies inside Cuatrecasas' portal. Appropriate form design was important for the proper approval of the vacation request because the forms also include information about the vacation situation of the global team. As a consequence, Ultimus' capability to interact with external applications enables Cuatrecasas to centrally manage vacation coordination for the global team.



Ultimus contributed greatly to increase the lawyers' time spent on chargeable work of legal services leading to higher profitability of the company and their efficiency and effectiveness.

Business Benefit

From a business perspective, there are numerous advantages due to the automation of the processes. Since the systems synchronise automatically, resources are allocated efficiently within the enterprise and are consequently more productive than ever before. Having the new starter set up in time allows the enterprise to benefit from the additional staff member from the start, thus being more efficient and effective. Previously the new employee setup process took 2 to 3 weeks and sometimes was "incomplete." With Ultimus handling the automation, process completion is guaranteed within one week including performance of all tasks involved. However, the largest benefit is generated in the IT department, as previously it took several hours to add the new user to the various systems which is now conducted automatically by Ultimus.

Future

Thus far Cuatrecasas has automated three processes; the new employee process and the vacation request process as mentioned before, and a conflict checking process, which screens commercial or legal assistance conflicts between existing and new cases and clients. For 2005, Cuatrecasas has planned a process for requesting a meeting room, a process that manages evaluation of lawyer performance, an expense approval and an invoice review process.

Due to the great success they achieved through the BPM initiative, they are continuously identifying new processes that can be optimised and automated. Any automated process that can help increase the lawyers' time spent on chargeable tasks increases the profitability of the company and their efficiency and effectiveness. Ultimus Business Process Management as become a valuable asset for the company and thus generates a high return on investment.

About Ultimus

A pioneer in Business Process Management and workflow automation, Ultimus is a profitable, global software company that enables enterprises worldwide to increase their profits by modelling, automating, managing, and optimising every business process. Ultimus has business operations and sales offices throughout North America, Europe, Asia, South America and the Middle East. Through these offices and a network of more than 100 partners in 60 countries, more than 1,500 customers, including Siemens, Sony, Microsoft, Newell Rubbermaid, and HP Indigo have deployed the Ultimus BPM Suite to address their business process management challenges. Ultimus and its partners use the Ultimus Workflow Development Methodology to standardise implementations, accelerate deployments, and enable continuous improvement.

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