

THOMSON REUTERS ELITE CASE STUDY MOORE & VAN ALLEN

DESIGN GALLERY TRANSITION BOOSTS
BILLING EFFICIENCY AND ACCURACY



MOORE & VAN ALLEN

DESIGN GALLERY TRANSITION BOOSTS BILLING EFFICIENCY AND ACCURACY

CONSOLIDATING BILLING PROCESSES

Moore & Van Allen is one of the largest law firms in the Southeast, with three regional offices and a national reputation. The firm has nearly 300 lawyers who strive to provide creative solutions to complex legal challenges and high quality legal services in a multitude of practice areas, including corporate law, finance, bankruptcy, litigation, intellectual property, and trust and estates.

According to Financial Systems Manager Stephanie Ward, the firm makes it a priority to leverage leading-edge technology in order to continuously improve critical operational processes. "Our management team values solutions that provide our decision makers with better data and ultimately improve our cash flow," Ward explains. "We embrace technology to deliver the most up-to-date information as efficiently as possible."

Throughout the past 20 years, the firm's core technology has comprised of several Elite solutions, including Enterprise™, eBillingHub®, ContactNet®, and Document Studio™; a server-based solution that automates the creation and distribution of critical documents. After a decade of leveraging Document Studio, Ward and her team made the decision to transition to Design Gallery™, a document automation solution designed to streamline the collection, conversion, and distribution of data. After Ward and her team received training, they developed MVA's proforma solution leveraging Design Gallery's sophisticated automation capabilities...

Ward and her team had designed the templates used in Document Studio years earlier, so it was critical that Design Gallery provide the same customizations, with the added benefit of improved performance speed. When the firm went live on Design Gallery, it was not only able to replicate its templates, but also consolidate them. As opposed to maintaining 15 different templates in Document Studio, Ward and her team now have one

.....
"Processing proformas in Design Gallery takes two minutes to complete, and we have yet to run into any problems with the single server."

Stephanie Ward
Financial Systems Manager

.....

proforma template, one invoice template, and one joint invoice template in Design Gallery. Ward notes, "The beauty of Design Gallery is that its solutions offer multiple output formats and distribution options all within one single solution."

The firm was also able to consolidate its technology, transitioning from nine Document Studio converters to a single Design Gallery server. "Design Gallery adds value because it eliminates hours of time we used to spend maintaining, patching, and trouble-shooting the many servers used by Document Studio," says Ward. "Best of all, the processing speed with Design Gallery is phenomenal. Processing proformas in Design Gallery takes two minutes to complete, and we have yet to run into any problems with the single server."

Design Gallery's advanced Automated Data Transformation design provides more speed and flexibility to support specific and often varied business processes by transforming data into a variety of formats and distributing it quickly and efficiently. Its integration compatibility with Enterprise and 3E® allows for the rich creation and conversion of paper-based documents, advanced spreadsheets, text/XML files, and output meant for online publishing and mobile devices.

MOORE & VAN ALLEN

With nearly 300 attorneys, a long history of civic service, and noted national, regional, and local clients, Moore & Van Allen ranks among the Southeast's preeminent and fastest growing full-service law firms.

BUSINESS CHALLENGES

The firm needed a document automation solution to design customized billing templates.

WHY DESIGN GALLERY?

Design Gallery is an automated data transformation solution that quickly and efficiently streamlines the collection, conversion, and distribution of data.

BENEFITS

- Consolidated existing templates and technology infrastructure
- Significantly reduced speed of proforma generation and distribution
- Improved client service with infinite template customization capabilities

TIME-SAVING BENEFITS

Since implementing Design Gallery, Ward has noticed that the speed of the firm's monthly proforma generation has been cut in half. Proformas can be distributed in a matter of minutes, reducing inefficiencies in the billing cycle.

"Our lawyers now receive proformas in minutes, and because they are able to edit them electronically, they can return them for billing in a matter of hours," describes Ward. "Without Design Gallery, we wouldn't be able to include key information on our proformas. Attorneys have fewer follow up questions because the data is right at their fingertips."

Another major benefit of Design Gallery is its ability to instantly and effortlessly make template changes. This was a cumbersome and labor intensive process previously, requiring converters to be stopped and restarted every time a simple change needed to be made. Any changes would have to be manually applied to each template.

"When a component change is made in Design Gallery, it is instantly reflected across all templates," says Ward. "This has reduced downtime and resolved formatting inconsistencies."

To further improve efficiency in the billing pipeline, Ward anticipates implementing a secure network portal from which lawyers can retrieve their Design Gallery proformas electronically. It is also a near-term goal to electronically deliver proformas to lawyers who receive fewer than ten each month.

"Our lawyers now receive proformas in minutes, and because they are able to edit them electronically, they can return them for billing in a matter of hours. Without Design Gallery, we wouldn't be able to include key information on our proformas. Attorneys have fewer follow up questions because the data is right at their fingertips."

Stephanie Ward

"It is crucial that we can design our templates using standard XML and SQL to create any customizations to meet our clients' needs."

Stephanie Ward

LEVERAGING ROBUST XML CAPABILITIES

The firm went live on Design Gallery in February 2014, and according to Ward, the implementation and week-long training that followed went very smoothly. She and her team were even able to begin designing their own templates immediately afterward using the solution's XML functionality. "We thought that designing and maintaining our own templates would benefit us in the long run, and it has since been proven to reduce the amount of time that we spend managing changes and adding customizations to our templates," she explains.

Design Gallery's XML formatting capabilities have enabled Ward and her team to improve the firm's proforma designs with endless customizations that would not have been possible otherwise. For example, when Ward noticed that Design Gallery's templates didn't have an option to include the standard rate on a proforma, she and her team were able to make the addition themselves. Because reducing paper is an ongoing goal for the firm, Ward and her team also use XML formatting to automatically recognize which lawyers would like to receive proformas electronically.

The solution's dynamic formatting capabilities have also helped the firm improve its client service. When requests are made for specific data to appear on client invoices, Ward's team is able to make the adjustments quickly and easily. "As opposed to having to understand the various template rules of Document Studio, Design Gallery's use of XML, while technical in nature, is much more intuitive."

Ward says she would highly recommend Design Gallery to other firms, especially those that are using Document Studio. "The speed and efficiency of Design Gallery is incomparable to Document Studio," she describes. "It is crucial that we can design our templates using standard XML and SQL to create any customizations to meet our clients' needs." Ward concludes.

For more information about Design Gallery, please call **+1 800-977-6529** or visit **www.elite.com**.

