

# THOMSON REUTERS ELITE CASE STUDY GABLEGOTWALS

MID-SIZED LAW FIRM LEVERAGES BUILT-IN 3E FLEXIBILITY

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## MID-SIZED LAW FIRM LEVERAGES BUILT-IN 3E FLEXIBILITY

### REVOLUTIONARY PLATFORM AVOIDS OBSOLESCENCE

GableGotwals, an Oklahoma-based law firm with 65 lawyers practicing in two offices, believes in leveraging technology to level the playing field and to successfully compete against larger national firms. When management realized its conflicts system was no longer being supported by the vendor and the maintenance fees on its time and billing system were not offering enough value, they started looking for better alternatives.

Rather than wasting money on outdated technology, management looked for a next-generation platform that was actively growing and developing.

Accounting Manager Mark Burt instantly recognized the potential of the 3E® Financial and Practice Management Systems. “3E was the first professional services software application I’ve seen that truly delivered on the promise of .NET technology, which is really about reusing programming objects without having to start from scratch or alter the core platform. It provides an extremely flexible environment that allows almost limitless ability to customize the system to match our needs—both immediate and long-term,” says Burt.

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**Mark Burt**  
Accounting Manager

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This technology approach was attractive because Burt and his team had already developed numerous custom applications and reports for its previous system that they didn’t want to recreate. The 3E integrated development environment (IDE) and Microsoft® BizTalk® Server enable unrestricted collaboration and integration with the firm’s existing databases, which means they can port these custom applications to 3E without complications.

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### WORKING WITHIN AND OUTSIDE OF 3E FRAMEWORK

Ultimately the goal for the firm was to find efficiencies by operating as a single firm on a single platform—specifically to automate more workflow processes between the two offices and reduce paper-based transactions. The two main areas Burt and the management team focused on improving from the start were new business intake (NBI) and proformas.

#### Transforming NBI and Conflicts

To streamline the NBI process, the conflicts searching and reporting processes needed an overhaul. The previous process produced a paper-based report that was cumbersome, which made it difficult for lawyers to quickly determine if there was a conflict of interest and its history. Naturally this caused the NBI process to stall and, as a consequence, lawyers did not have an effective way to capture any time spent in the early days of a new matter.

“We’re an old firm and have always been fastidious about keeping all of our conflicts of interest records. So we had good reports, but it was like digging a ditch with a spoon. No matter how good the spoon is, it’s still the wrong tool,” says Burt. “One of the attorney’s least favorite administrative tasks was wading through conflicts reports and trying to set up a new matter.”

### GABLEGOTWALS

GableGotwals is a full-service law firm that has been practicing law for more than 90 years. Areas of expertise for the firm’s 65 lawyers range from energy litigation and labor law, to technology and intellectual property. With offices in Tulsa and Oklahoma City, its reach is global with Fortune 500 corporations, entrepreneurs, privately owned companies, foundations, and individuals.

### MISSION

To invest in a modern technology platform to achieve efficiencies across offices.

### WHY 3E?

3E is a next-generation financial and practice management system that realizes the promise of flexibility and power that .NET architecture can provide.

### BENEFITS

- Greatly simplifies conflicts searches and streamlines new business intake
- Provides tools to create custom processes (such as paperless proformas) to speed month-end process
- Enables single-office efficiencies
- Reduces time spent on administrative tasks



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**Mark Burt**

3E takes the conflicts search from a paper-based, manual process to a collaborative inquiry-based process that features easily identifiable flags indicating potential conflicts. With full drill-down capability, lawyers can more quickly resolve any questions and streamline the time and effort spent on evaluating new business. Once approved, matters are easily set up so lawyers can start tracking their time.

“Improving our conflicts process was paramount when we first implemented 3E. We now have faster, simpler, and more accurate new business intake. Being able to respond to potential new clients more quickly and reduce the number of administrative hours spent on conflicts searches has been a huge return on investment for the firm,” adds Burt.

**Getting Creative with Paperless Proformas**

The ability to customize the firm’s proforma process is a great example of how Burt and his team were able to leverage 3E’s flexibility. Within 3E, this process is limited by how lawyers can view the files, as well as use color to make proformas more readable. As a result, Burt and his team are creating a “My Proformas” dashboard on the firm’s intranet for a more user-friendly proforma edit process. They have developed a creative way to pull the data out of 3E, allow staff to make changes via their intranet, and return the information back into 3E so the system can create the bill as normal.

By taking the proforma data out of 3E, Burt has far more control, allowing him to display the information in a user-friendly way through use of color and screen real estate. For example, any changes are highlighted with different colors so lawyers can get an at-a-glance view of what changes have been made, such as bill rates or narratives. Plus the process is designed to allow multiple fee earners to make edits simultaneously, which is all tracked through the audit history.

“In order for this process to happen, 3E accepts changes that occur outside the system through customized fields and, more importantly, customized business logic. This is just not possible with other software systems. This type of flexibility is a perfect example of how 3E can match our processes instead of us having to match its processes,” says Burt.

Burt anticipates that this new proforma process will provide exponential ROI for the firm, because it should shorten the billing process by up to five days. “We will save a tremendous amount of time by eliminating the physical routing of proformas between offices and having the accounting staff manually entering in the changes,” he says. “We now have the potential to complete the entire billing process within hours instead of days, which will obviously improve the firm’s cash flow.”

Burt is planning to present this new paperless proforma capability at Thomson Reuters Elite’s upcoming 2011 User Conference.

**SMALL FEATURES THAT MAKE A BIG DIFFERENCE**

**Billing**

3E allows the billing staff to see a preview of the bill without having to actually generate it, which was not available to them with the previous system. The billing clerk can make changes on the screen to see if they produce the format intended, which clearly saves time.

3E is a quantum leap forward in regard to bill templates. The firm’s previous system used 46 different bill formats; if they wanted to make a universal change, such as a new logo, the change had to be implemented on 46 templates. Now they manage just one global bill template that maintains firm- standard information, yet allows the staff to easily create any possible presentation of the data according to the client’s requests. These options can be applied to a single bill and not impact the others, significantly saving time and improving client service.

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### Worklists

Another feature that sets 3E apart from competitive solutions is its ability to work on multiple records simultaneously, rather than having to close one out in order to open another. Most software programs just don't support the concept, while 3E mirrors the way the firm's staff works.

Additionally, the staff loves the process of creating records in 3E. They are simply able to clone an existing set of folders and inserts and change the description as necessary, instead of having to create folders one at a time. Setting up a record in 3E takes just a fraction of the time compared to the previous system.

"Even though these features may seem trivial, they make a big difference with repetitive tasks. If we can shave a minute or two off these tasks on a daily basis, the cumulative effect is significant," adds Burt.

### ELIMINATING THE DISTANCE OF PAPER

Without question, GableGotwals has reduced its paper consumption use through electronic processes in 3E. This not only eliminates courier and storage fees, but also saves a tremendous amount of time communicating between offices and speeds standard workflow processes. "3E is basically allergic to paper," quips Burt.

By achieving the firm's initial goals of automating workflow processes and reducing its reliance on paper, 3E has created a more single-office environment, which has created enormous efficiencies even in unexpected places.

By standardizing processes and forms within 3E, everything looks, feels, and acts the same, thus enabling users to be trained on just one 3E form, but be able to use all of them. "What we are finding is that we don't have to conduct extensive training with some of our new hires because 3E is so intuitive to use. It's amazing that staff can become self-sufficient on the system in such a short period of time," explains Burt.

### LONG-TERM INVESTMENT

"We feel that our investment in 3E is going to outlast what we would typically spend on a previous generation software platform. 3E is built not to become obsolete because it gives almost limitless ways of accomplishing tasks as the need arises. It gives an artist an unlimited palette to work from if he or she has the skills to use it," concludes Burt.

To learn more about 3E or for a global list of office locations, visit [elite.com](http://elite.com).

