

THOMSON REUTERS ELITE CASE STUDY DUANE MORRIS LLP

TRANSFORMING BILLING AND CONFLICTS REPORTING
WITH DESIGN GALLERY



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PERFORMANCE UPGRADE WITH A TRUSTED PARTNER

Duane Morris LLP was founded in Philadelphia in 1904 with just four lawyers. The firm has grown to be among the 100 largest in the world, with more than 700 lawyers across offices in North America, Europe, and Asia addressing client issues around the globe. Over more than a century, the firm has made the pursuit of its clients' best interests the priority of its practice.

In 2010, Carmen Ferro, Thomson Reuters Elite Applications Manager at Duane Morris, was at a crossroads with the firm's Document Studio™ solution, which was providing report and data formatting capabilities for the firm's Enterprise® system. After working with Document Studio for 10 years, he was finding that it required more than a dozen servers to perform vital routine tasks. To increase performance, Ferro was faced with either continuing to add to the number of servers or converting to an entirely different system.

Fortunately, Ferro and his team were introduced to Design Gallery™; a document automation solution that streamlines the collection, conversion, and distribution of data within the Enterprise and 3E® systems. The sophisticated capabilities of its advanced automated data transformation design provide more speed and flexibility to support specific and often varied business processes.

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Carmen Ferro
Thomson Reuters Elite Applications Manager

Ferro attended a local industry meeting where another firm presented their experience of converting to Design Gallery, and he instantly recognized the positive impact it could make for Duane Morris. "The presenting firm conducted Conflict searches in a similar way that we did, and with Design Gallery they had reduced the time it took to complete a Conflict report from overnight to just a few minutes," recalls Ferro. "Upon further investigation, we discovered that Design Gallery could be supported with one to two servers. The significant performance improvements and consolidation of our server infrastructure made the decision to convert to Design Gallery a no brainer for us."

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Carmen Ferro

KEYS TO SUCCESSFUL CONVERSION

Retaining Prior Investments

For firms like Duane Morris that have outgrown the capabilities in Document Studio, Thomson Reuters Elite provides expert conversion services to make the switch to Design Gallery. A particular issue for Ferro was his desire to maintain the investment the firm had recently made to consolidate its billing formats from about 250 down to 20 or 30.

"I knew if we went with another solution, we would probably lose the progress we had made on our bill templates. The Design Gallery implementation team guaranteed us that it would be able to fully replicate all of the work that had existed in Document Studio," Ferro explains.

DUANE MORRIS

Duane Morris LLP, a global law firm with more than 700 lawyers in offices across the United States and around the world, is asked by a broad array of clients to provide innovative solutions to today's legal and business challenges.

GOAL

To make a conversion worthwhile, a new solution needed to process reports faster with less infrastructure requirements.

WHY DESIGN GALLERY?

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

BENEFITS

- Significantly consolidated the firm's network infrastructure
- Increased overall Billing and Conflict report efficiency in terms of time, cost, and output
- Reduced the number of operational man-hours necessary to maintain the system

Intensive Testing Pays Off

Ferro cannot overstate the importance of testing during the conversion, particularly since the team was dealing with two high exposure processes—Conflicts and Billing. To that end, Ferro decided to install three dedicated Design Gallery servers: one for Conflicts, a second for Billing, and a third for testing. A dedicated testing sever was not only critical for the conversion, but it continues to provide an environment to test ongoing changes to reports as needed.

Developing and executing a meticulous testing plan gave the team confidence that the final Billing and Conflicts reports would be accurate and problem-free when they went live. “We would test and retest items repeatedly to ensure that these critical reports produced exactly what we needed. We have a very customized Conflicts report template we needed to adhere to and the invoices are obviously client-facing, so they needed to be perfect,” says Ferro.

The only thing Ferro would change with the plan would be to include more rigorous printing tests. Although the printing function was tested, he would have run a much higher volume of reports through the system to better reflect the live environment.

Optimum Customization

Ferro was impressed by Design Gallery’s ability to easily replicate existing reports and templates, making them nearly identical to those the staff was accustomed to and conforming to client requirements. “Design Gallery painlessly met our design goals,” he says. “We simply had to show the implementation team the existing report, and they would recreate a version within Design Gallery.”

The team also fixed errors during the process when needed. Ferro explains, “If we came across a problem with an existing template, the Design Gallery team was right there to fix it. We had about 50 of these instances, and by the end of the project our Billing staff was very enthusiastic about using Design Gallery because of the success they had already experienced.”

Ferro attributes the successful conversion to the Design Gallery team’s comprehension and execution of the firm’s needs. “Something that we really appreciated was that once we got into the testing phase, we would have weekly status calls to keep everyone involved and on the same page,” explains Ferro. “If we had any issues during conversion or after going live, the Design Gallery team would quickly jump to address them. The overall support we received was really great.”

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SIGNIFICANT TIME AND RESOURCE SAVINGS

Meeting Billing Goals

The firm’s month-end closing process has been significantly streamlined as a result of Design Gallery. Previously, generating the firm’s 15,000 monthly invoices would take eight to 10 hours, running on eight servers overnight, oftentimes missing the firm’s morning goal. With Design Gallery, the firm can generate monthly bills in as little as three hours using just one server.

“Design Gallery made a huge difference in helping us accomplish our month-end goal of processing invoices overnight and having the system ready to start the next accounting period in the morning,” explains Ferro. “I don’t think there are too many firms our size that are able to do that.”

Faster Conflict Reporting

Simultaneous Conflict reports are also generated much faster than before because of how Design Gallery’s back-end operates. Document Studio ran as a single-threaded application that needed to interact with Microsoft® Word on the same server. By contrast, Design Gallery does not require Word to be installed on the server and is multi-threaded, so many files can be converted at the same time, preventing any one file from stopping other files from being processed immediately.

“Large Conflict reports no longer clog up the system and prevent smaller searches from being conducted,” shares Ferro. “These reports are generally time sensitive, so any delays are problematic.”

Reduction in Man Hours

Ferro computes the firm's return on investment from Design Gallery in terms of operational man-hours saved. "Our investment was really in the conversion process. Now that it is up and running, Design Gallery requires considerably less time to manage and operate."

Ferro wouldn't hesitate to refer Design Gallery to other firms, especially those opting to switch from Document Studio. "Firms converting from Document Studio have a distinct advantage with Design Gallery because of the team's vast knowledge and experience with these two solutions."

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For more information about Design Gallery or for a global list of office locations, visit elite.com.

