AMP UP PROFITS WITH FINANCIAL MANAGEMENT

LEAP FORWARD WITH NEXT-LEVEL TECHNOLOGY
ONE TECHNOLOGY
TO MEET ALL
CHALLENGES
Today’s business requirements demand that your firm be a unified, cohesive organization to be profitable. But an array of traditional and new financial management challenges stand in your way. At the very least, you need proper accounting, billing, payable, and trust procedures. To be really competitive and secure a profitable future, you need insight into your firm’s financial performance. And if you want to be flexible and responsive for your clients, you need mobility.

Financial Management from Thomson Reuters Elite gives you all of these tools in ways to amplify your financial performance and boost profitability.

It’s a new way of doing business. With 3E as its foundation, Financial Management is comprised of an extensive set of built-in functionalities, a common set of services, and a highly scalable structure so you can extend and customize applications to match the way your firm operates. All activities reside within the Financial Management platform, so there is no need to use outside applications or time-consuming manual processes, and on-the-go mobile capabilities make it easy to obtain information where and when you need it. And an advanced architecture helps you efficiently and profitably manage multiple office locations, complex company hierarchies, and multiple languages and currencies.

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**Our industry-leading technology provides the flexibility and the insights to help you make better decisions today and the scalability to help your firm meet the challenges of tomorrow.**

Financial Management provides the tools and information to amp up performance—for the CFO, partner, lawyer, and CIO.

How? Read on...

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**FINANCIAL MANAGEMENT IMPROVES BUSINESS FOR:**

- **Legal and professional services firm leaders** who want to grow their business and operate more competitively in an increasingly global industry
- **Lawyers and partners** who need flexibility to work whenever and wherever they need to with time tracking, document management, and client information at their fingertips
- **Development and IT staff** who have unique requirements and need advanced integration capabilities when and where they’re needed
- **Firm leaders** who want to improve quality, increase efficiency, and reduce risk with standardized workflows and automated critical functions
- **Finance officers** who need business intelligence to make strategic decisions and to improve financial performance
INNOVATION FOR A MORE PROFITABLE FUTURE

BOLD NEW INSIGHTS TO BOOST PROFITS
Financial Management provides all aspects of accounting—general ledger, purchasing, accounts payable, collections, e-billing, trust accounting, and time tracking—plus powerful financial intelligence tools, key performance indicators (KPIs), and analytics, all delivered in an easy-to-use dashboard.

NEXT-LEVEL EFFICIENCY
Workspace is the first user interface to bring together all of your business management activities in a single view. Thanks to the Elite Integration Framework technology, Workspace streamlines your desktop with time and revenue and document management and provides full mobile capability so you can get up to the minute KPIs and insights.

FUTURE-PROOF TECHNOLOGY
With technology designed to scale, Financial Management grows with your firm and eliminates costly point integrations. Built-in capabilities streamline tasks and communications, and risk management tools such as analytics, reporting, security, and multicurrency and multilanguage support help you mitigate risk and ensure security controls are in place.

BE THE LEADER WITH THE MOST INNOVATIVE TECHNOLOGY IN THE LEGAL INDUSTRY
Financial Management is comprised of 3E, Design Gallery, Financial Reporting, xcelerate, and eBillingHub. Together, they cover all aspects of accounting—general ledger, purchasing, accounts payable, collections, e-billing, trust accounting, and time tracking—all of which can be configured from the ground up to enable you to gain complete visibility and control of your firm’s financial health. Robust functionality helps you meet billing and cash management objectives with tools that help you shorten the work to cash cycle, improve time capture, swiftly create and distribute invoices, and more.

Elite delivers powerful business intelligence to amplify your firm’s financial performance. Advanced reporting capabilities deliver insights never before possible in near real time to enable you to make data-driven decisions. In another industry-first, your firm can now access exclusive e-billing intelligence and benchmarking, so you will not only know how your firm is performing against internal targets, but also how your performance compares to that of your competitors and peers.

What makes Financial Management even more powerful? Elite now offers Workspace, which empowers your lawyers and professionals to access all business management activities from a single, intuitive user interface for maximum efficiency and insight. Built on a leading integration technology, Workspace allows you to access the full range of business management tasks and insight, from time and revenue management, to document management, to key performance indicators (KPIs)—all in a single view.

A financial management solution is only as good as its long-term benefits. The leader in providing financial management systems to professional services firms, the Elite core financial management system uses advanced architecture flexible enough to grow with your firm for the next decade and beyond. This financial management system fits easily into the new Elite Integration Framework, which brings all of your tools and operational data into one platform and eliminates costly point integrations.
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<th>CRITICAL PROCESSES</th>
<th>HOW FINANCIAL MANAGEMENT IMPROVES PRODUCTIVITY</th>
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| Time & Expense Management   | • Includes passive capturing, editing, reporting, central management, and charge and cost entry features  
• Addresses expense entry, AP integration, and workflow                                                                                                                                  |
| Invoice Management          | • Provides everything you need to help manage invoices, from intake to reporting. Capabilities include pre-invoice workflow, invoice generation, invoice formatting options, maintenance/configurations, collect process management, reporting, trusts/client monies, and management of rates and fee arrangements. |
| Accounting Management       | • Includes capabilities to handle charts of accounts management, audit analysis, reporting, benchmarking and analysis, financial statement reporting, tax reports, financial budgeting, bank management and reconciliation, cash management, compliance, general ledger transaction management, subledger postings, subledger reconciliation, fixed assets, intercompany transactions and billing, and cost accounting and profitability  
• Handles vendor management, vendor payments, reporting, imaging and scanning 1099 reporting, and purchase orders and processing                                                                         |
| Financial Business Intelligence | • Includes financial reporting, e-billing intelligence, and benchmarking                                                                                                                                  |
| Budgeting and Forecasting   | • Includes a Web- and Microsoft® Excel®-based solution for budgeting and forecasting of operating expenses, fee earner revenue, fee earner compensation, and capital expenditures  
• Push global assumptions from a firm-wide level down to the individual fee earners, and build your budget and forecasts from the lowest level of detail |

AN INNOVATIVE AND
GLOBAL LEADER
Thomson Reuters Elite offers a complete Enterprise Business Management Solution to run all operational aspects of your firm, including business development, risk management, client and matter management, and financial management. Using our integrated suite of offerings enables you to increase visibility and streamline workflow, ultimately improving profitability and exceeding your clients’ expectations.
As CFO, one of your responsibilities is to provide your special expertise and knowledge to make your firm the best in a very competitive marketplace. This challenge requires that you have the right information at your fingertips at the right time, all the time. Without the proper business intelligence and analytics, you can't access the critical facts your firm needs to make the important strategic decisions required by today's business environment.

Financial Management provides you with the robust capabilities you need to run your business smarter and more efficiently. You gain the insights you need to steer your firm in the right direction, right at your fingertips, in a single, unifying platform to help you make better business decisions while maximizing the efficiency of your firm.

Financial Management provides you with the most advanced and relevant KPIs, in-depth analytics, and intuitive, easy-to-use dashboards to help you make the best business decisions. You get access to near-real-time business intelligence never before available and, for the first time, you can gain insights into your firm’s e-billing KPIs so you can benchmark against your competitors’ billing performances.

To oversee your firm’s day-to-day activities, Financial Management brings better efficiency through a unified platform and advanced features to improve cash flow and financial performance. Your firm reduces its operating costs by having access to all applications from a single trusted provider.

CFO: “We need easy access to the right information to make strategic, profitable decisions for our firm.”
Financial Management is built on a next-level technology that gives you a comprehensive suite of offerings that streamline your firm’s accounting and financial reporting activities. A consistent, Web-based user experience allows you to easily track and manage activity.

In addition, you gain significant efficiencies from the automation of collection, conversion, and distribution of financial data, and the accelerating of cash flow by automating and error-proofing the e-billing processes, proforma workflow, and other key operations.

With Financial Management, you profit in efficiency, insights, and increased ROI. Keeping your finger on the pulse of your firm with Financial Management will enable you to help your business grow and prosper.

CFO: “We must operate more efficiently to drive better financial performance.”

THE FINANCIAL MANAGEMENT ADVANTAGE FOR CFOs

- Boost efficiency by running all financial operations with a single, best-of-breed system
- Improved cash flow from automating and error-proofing processes—from e-billing validation, to proforma management, to template automation—all of which shorten the work to cash cycle.
- Advanced reporting capabilities that deliver insights in near real time to enable data-driven decisions
- E-billing intelligence and benchmarking so you will know not only how your firm is performing against internal targets, but how your performance compares to that of your competitors

With Thomson Reuters Elite, customizable analytics help you gain better visibility into how your business is performing.
As a lawyer, your time is precious, your clients are important to you, and you need productivity solutions both at your desk and from your mobile device. Having to log in and out of multiple systems to complete your business-related tasks slows you down and eats up valuable parts of your day, leading to fewer billable hours and less time spent on client matters.

Financial Management helps you get back that valuable time with Workspace—the first user interface to bring together all your business management activities in a single view. You can manage your time, view financial KPIs, view client and matter information, and access documents all without having to jump from system to system. And, you can be sure your information is being managed with maximum efficiency and consistency because all data and functionality is tied together with a common matter number.

Workspace makes it possible for you to gain insights that empower you to deliver greater client satisfaction and drive profitability. With KPIs, like accounts receivable and work-in-process balances, rate realization and other financial summaries, you are in a better position to manage your goals and proactively manage your clients.

For the first time, this information is coupled with documents and matter information, so you can easily see a complete picture of insights relating to a particular client or matter. This integrated perspective helps you make data-driven decisions, improve profitability, and manage clients more effectively.

Lawyer: “I spend too much time on business management activities, which takes time away from what I do best: practicing law.”
Workspace works the way you do, with capabilities that move from desktop to mobile so you can access key information and functionality, no matter where you are. Workspace makes it easy to capture billable hours, increasing your efficiency with a minimum of effort.

Workspace streamlines workflow at your desktop by delivering the full range of business management features lawyers need in one view, from time and revenue management to document management, and allows you to view KPIs and other information directly from your mobile devices, so you can prepare for client conversations with up-to-the-minute insights.

Lawyer: “I need flexible productivity solutions that can work the way I work—whether I am at my desk or on the go.”

THE FINANCIAL MANAGEMENT ADVANTAGE FOR LAWYERS

- Streamline business management with a one-stop-shop so you can get back to practicing law
- Access strategic insights you never had before in a single view so you can improve client satisfaction and profitability
- Enter time on the go with an intuitive user experience for your smartphone or tablet
- View KPIs and key insights directly from your mobile devices to prepare for client conversations with up-to-the-minute insights
GROW WITH FUTURE-PROOF TECHNOLOGY

CIO: “Our legacy technology isn’t flexible enough to grow with our firm. We need something that can move with us into the future.”

As CIO, you deal with the challenges of analyzing and integrating ever-changing technologies into a constantly shifting legal environment. It seems like systems become outdated almost immediately after release, and the cost in hard currency, lost time, and focused manpower to weave new technology into your firm’s existing systems and organization is substantial. What you need is a reliable, scalable technology solution that can grow seamlessly, effortlessly, and efficiently to meet your firm’s future requirements with a minimum amount of disruption to existing systems and user experience.

With Financial Management, you gain a proven, future-proof technology stack, with an advanced architecture flexible enough to grow as your firm grows. What enables this flexibility? The Financial Management Integrated Development Environment (IDE) enables your firm to be more agile in responding to client needs and incorporate new features with unparalleled speed and reliability. You can add or modify screens, create new database tables or columns, and change business logic. All your changes remain intact when you install system upgrades.

Financial Management fits easily into the new Elite Integration Framework, which brings all of your tools and operational data to you in one single view, to connect your entire firm and eliminate costly point integrations.

Elite’s Financial Management offering features a variety of built-in capabilities that streamline tasks and communications, including embedded workflow and collaboration tools. Workflow—a structured series of process steps governed by business rules—allows your firm to automate processes, eliminating time-consuming manual processes. Collaboration tools make it easy for users to provide ad-hoc input and comments, all without leaving the system.

GO “EXPRESS” FOR IMPLEMENTATION IN 9 – 12 MONTHS

An Express Service Package is also available—preconfigured for prescriptive and quick implementation. This package delivers a highly standardized 3E configuration in just 9 to 12 months and is ideal for non-specialty firms with the following characteristics:

• 150 to 300 fee earners
• Would benefit from faster implementation over customization
• Does not undertake high-volume, low-cost litigation work
• Works in a single language and reports in one currency
Combined with an unmatched services architecture, these capabilities offer several advantages: a consistent look and feel, a common set of services, and a highly scalable foundation.

What makes the Financial Management solution truly powerful are the capabilities that enable you to integrate Financial Management with your firm’s other operational systems. Financial Management fits easily into the new Elite Integration Framework, which brings all of your tools and operational data to you in one single view to connect your entire firm and eliminate costly point integrations.

CIO: “Every time our firm gets a new system, extensive services are needed to connect it to our existing technology.”

THE FINANCIAL MANAGEMENT ADVANTAGE
FOR CIOs
• Configure workflows to match firm requirements with advanced architecture and the Integrated Development Environment
• Rapidly develop firm-specific applications that meet your unique needs
• Keep your technology up to date while preserving business customizations
• Reduce costly point integrations with the common technology platform delivered with the Elite Integration Framework
AMP UP YOUR FIRM’S PERFORMANCE

SECURE YOUR FIRM’S FINANCIAL FUTURE

Our Financial Management offerings are based on a common technology platform that unifies financial management with other essential business capabilities in client and matter management, risk management, and business development, all delivered in a single enterprise business management solution (EBMS). The Elite EBMS gives you the tools to effectively manage and connect these four major areas of your firm’s operations. This end-to-end solution delivers the power to streamline processes, drive operational efficiency and transparency, provide critical insights into your business, and eliminate information silos. Elite delivers a complete solution to connect all operational aspects of your firm for increased collaboration, visibility, and productivity.

With Financial Management, you gain a future-proof technology that your firm can rely on for the next decade and beyond. The improved operational efficiency you achieve will save your firm time, help your lawyers be more flexible and productive, and improve collaboration across the board.

To learn more about Financial Management from Thomson Reuters Elite, visit elite.com/ampup. For an interactive preview, scan this code with your smartphone.