

# ELITE CASE STUDY MCKOOL SMITH

BETTER VISIBILITY INTO FIRM PERFORMANCE ENABLES  
PROACTIVE MANAGEMENT WITH 3E



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**ELITE**®

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### PROACTIVE FIRM MANAGEMENT WITH LEADING TECHNOLOGY PARTNER

McKool Smith, one of the nation's leading pure trial firms with 130 attorneys in six offices, boasts significant courtroom victories and substantial settlements for domestic and international clients. The firm has won more of the Top 100 Verdicts than any other law firm in the nation every year since 2008, and was recently recognized as one of the top four patent litigation firms in the United States by *Managing Intellectual Property*.

One aspect that sets the firm apart is its rigorous case preparation and presentation system. With unique tools and resources, the staff is able to manage and prepare complex litigation thoroughly yet cost effectively. Technology clearly plays a major role to support this system.

With the recent economic climate, firm management has found that technology also must play a major role in proactively managing the finances of a case. "Clients have stricter budget expectations that require our firm to manage matter budgeting on a more real-time basis," said Steve Bassinger, Director of Accounting.

*"We needed a solution that we weren't going to outgrow, from a company that was going to be in business for the long run. We feel 3E can easily support us for the next 10 to 15 years."*

Steve Bassinger  
Director of Accounting

Having a handle on matter budgeting is also critically important for the contingency fee work that the firm handles. In addition, the firm was growing at a rapid pace. "We wanted to better manage information so the attorneys could handle their cases more effectively and we could manage our resources more efficiently. There was no way our old software platform could support this," Bassinger adds.

Although management evaluated several software platforms, including the latest solution from their existing software vendor, none compared to the functionality in ELITE® 3E. 3E offers powerful core financial and practice management features and built-in application development capabilities—all seamlessly integrated into one high-performance system.

One of the biggest selling points for the firm was the stability and longevity of Elite, a Thomson Reuters business. "We needed a solution that we weren't going to outgrow, from a company that was going to be in business for the long run. We feel 3E can easily support us for the next 10 to 15 years," says Bassinger.

### SUCCESSFUL CONVERSION: ON TIME, ON BUDGET

Bassinger greatly appreciated Elite's quality control process for the 3E data conversion in order to successfully roll out the browser-based system to all six offices. The Elite Conversion Team guided the firm's internal team through a Project Quality Model (PQM) that served as a roadmap for the entire implementation lifecycle.

This detailed process not only ensured that the data maps were complete and testing was thorough, but also provided a venue to analyze business processes right from the beginning. New Business Intake, Conflicts, Reporting, and Matter Budgeting were among the key workflow areas where the team developed enhanced protocols for future implementation.

### MCKOOL SMITH

McKool Smith is recognized as one of the premier trial law firms in the United States with more than 130 attorneys in six offices. The firm handles complex commercial litigation, intellectual property claims, bankruptcy matters and white collar litigation for companies and individuals across the globe. According to the Legal 500 and Chambers, the firm has a higher proportion of legal experts than almost any other leading firm.

### CHALLENGE

The firm's previous software system was not able to support advanced reporting needed to proactively manage the firm.

### WHY ELITE 3E?

3E provides a next-generation platform that can be easily modified to fit firm workflow and reporting needs and will help McKool successfully manage growth well into the future.

### BENEFITS

- Faster and more reliable conflict searches
- Proactive management of matter, budget and resources
- Better evaluation of attorney productivity
- Enhanced internal and client communications

“The conversion process went very well. We had a great team that kept our project on time and on budget, despite what Elite’s competitors told us,” says Bassinger. “We received excellent on-site support even after our live date to ensure everyone was using the system properly and to address any issues on a one-to-one basis.”

### ENHANCING NEW BUSINESS INTAKE WITH ROBUST CONFLICTS REPORTS

3E enables Bassinger and his team to design workflows that are customized to the preferences of firm management, rather than having processes meet the needs of the accounting system. For McKool, this was a significant advantage for its client intake and conflicts processes from the start.

The firm manages a small number of large clients and, therefore, is very selective about the types of cases it brings on board. The new business intake process ensures that a robust conflicts check is performed. In addition, attorneys have an assigned matter ID to enter time, and everyone is aware of a prospective client’s status in the process.

“Conflicts searches are more reliable and the reports are so much easier to read without trolling through a huge amount of paper. We have more confidence that we are avoiding any conflicts of interest with new clients,” Bassinger says. “As we continue to hone our new business intake process, we feel it will ultimately help us manage and budget cases more effectively.”

### FLEXIBLE AND FASTER REPORTING

One of the most immediate benefits the firm has experienced with 3E is the accessibility and flexibility of the data. The Accounting Department can easily run a metric and analyze it in many different ways by sorting and grouping as well as including and excluding variables, which is something they couldn’t do very easily before.

For example, if Accounting staff wanted to generate a report on the financial status of the firm’s contingency cases, they had to run the report to include all cases and manually exclude all non-contingent data. Now they are able to not only automatically filter reports for contingency cases, but also get a snapshot of the hard costs associated with the matter with a click of a button.

“By generating reports faster in 3E, we are able to manage the firm’s cases and budgets more proactively versus waiting several weeks after the end of the month to analyze the data,” explains Bassinger. In fact, the team rarely distributed reports from the previous system, because the results were typically skewed and required an explanation or reason why the numbers didn’t necessarily make sense. “It is going to be easier to evaluate attorney productivity

In addition, 3E makes it easy to push out reports to every shareholder, timekeeper, and secretary so they can keep track of their own priorities. For example, timekeepers can look up their own time summary with a click of a button from the dashboard. Instead of shareholders requesting different reports several times of month, which might require IT resources to help design, Bassinger and his team can simply place a query report on their dashboards where they can access up-to-date information at any point in time. “We don’t need to send paper reports out any more,” he adds.

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*“It is going to be easier to evaluate attorney productivity with 3E, because reports are more reliable and truly reflect the real-time status of our operations.”*

Steve Bassinger

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### ENHANCED MATTER, BUDGET & RESOURCE MANAGEMENT

Having this level of information at their fingertips allows for a significantly enhanced management of matters, budgets and resources. With Matter Budgeting, it is just as important to look historically as it is to forecast the future. The accounting team can easily analyze the financial information from past cases to help estimate the cost of similar ones, which is particularly important with contingency fee-based matters. The Accounting team could previously generate a historical analysis, but they might have had to hire another staff member to manage the process that could take hours or even days. With 3E, they can generate that information in a matter of minutes.

Matter budgets can also be added to the attorneys’ desktops so they can keep track of the status of the matter in real time. “Having access to this information throughout the lifecycle of a case is a key feature for us so we can more easily monitor the budgets. If we are able to manage the case budgets more proactively rather than reactively, then our investment in 3E has more than paid for itself,” shares Bassinger.

McKool has a relatively flat hierarchical structure in which department heads don’t exist, nor does an extra layer of management, which means no one is dedicated to managing team resources. This meant that previously, with the older system, it was difficult to get an accurate picture of workloads which presented challenges if a team needed more resources. Now, the reporting capabilities in 3E enable the accounting department to push out reports to shareholders so they can see who is available—a much more efficient method of maximizing resources.

## BIG PLANS, NO SURPRISES

The team has just scratched the surface of 3E's functionality and Bassinger is looking forward to fully leveraging the power of the platform. He is currently working on additional workflows, such as Matter Closeout that will capture the results of a case for marketing purposes and more robust dashboard reports for shareholders to better manage the firm.

"Since 3E has been implemented, we are experiencing better communication with our internal teams and our clients. This means that there are no more big surprises at the end of the month, which enables a more proactive approach to managing the firm," adds Bassinger.

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For more information about ELITE 3E, please call  
**(323) 642-5200** or visit [elite.com](http://elite.com).



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