

# PROLAW CASE STUDY HERZOG CREBS LLP

PROLAW PAYS FOR ITSELF WITH INCREASED BILLABLE TIME  
AND ENHANCED COLLECTIONS CAPABILITY



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## PROLAW PAYS FOR ITSELF WITH INCREASED BILLABLE TIME AND ENHANCED COLLECTIONS CAPABILITY

### MODERN TECHNOLOGY PROVIDES A TANGIBLE COMPETITIVE ADVANTAGE

In 1998, leadership at Herzog Crebs LLP found that the firm was in a position similar to that of many law firms at the time. The firm's computers were not networked and there was no centralization of work products or standardization of processes. Until that point, the absence of technology systems had not hindered the firm's success. However, rising client expectations for more complex billing and more frequent communications triggered management to invest in modern technology platforms.

Staffed with 24 attorneys, Herzog Crebs provides legal advice and effective representation in several areas of transactional and administrative law and business litigation, and has earned a reputation in insurance defense and toxic tort litigation. The firm's technology needs were focused on implementing a centralized and standardized system—one where everyone had access to the same information.

A particular pain point was the old time and billing program in which staff entered their time on disks and was based on individual methods and preferences. Time cards were processed via several rounds of edits on paper before they were completed for month-end billing. According to Susan Casey, accounting manager, "Our prior billing platform was archaic, painful and time-consuming."

In addition, Herzog Crebs needed centralized electronic record keeping for accounting records and matter management. Due to the limitations of the prior system, reports could only be produced once with detailed information, so Casey's accounting team had to maintain historical paper-based files and reports on everything. Furthermore, the firm was just starting to win some very document-intensive, multi-plaintiff cases resulting in paper-based files difficult to maintain and nearly impossible to search through.

Casey and her technology committee evaluated different solutions but were sold on ProLaw®, especially its fully integrated approach that combines front and back office capabilities into a central database. "We also liked the fact that we could customize ProLaw and adapt it to how we practice law. This made it very user friendly," says Casey.

Within one year, the IT team at Herzog Crebs had networked their computers and implemented ProLaw. "We experienced a seismic shift on how we ran our practice which continues to pay major dividends," says Casey. "We now have large, substantial clients that would be difficult to keep if we had not invested in ProLaw. We are able to demonstrate that we can handle sophisticated and complex billing requests and manage very large cases."

The tangible benefits of implementing a solid technology platform have persuaded Herzog Crebs to continue its investment. In 2007, the firm upgraded to ProLaw version 11. "Our current version of ProLaw is especially user friendly," says Casey. "Because its interface closely resembles Outlook, the staff is more familiar with ProLaw and therefore is encouraged to use it for more of their daily tasks."

### BOTTOM LINE BENEFITS

#### Streamlined Time and Billing

Everyone at the firm uses the ProLaw Time and Billing feature. Management enacted a policy that required everyone to contemporaneously enter his or her own time directly into the system. This shift in behavior has yielded two significant benefits.

*"Capturing time throughout the day made a huge difference. With this increase, ProLaw paid for itself in about five months!"*

Susan Casey  
Accounting Manager  
Herzog Crebs

### HERZOG CREBS LLP

Founded in 1987, Herzog Crebs is a mid-size law firm that is based in St. Louis and serves businesses and individuals in Missouri and Illinois. The 24-attorney firm routinely handles complex business and commercial litigation, including toxic tort and insurance defense.

### CHALLENGE

To address complex billing demands and very large, document-heavy cases with an integrated financial and practice management technology platform.

### WHY PROLAW?

Built from the ground-up on a unified database, ProLaw combines case and matter management as well as time entry, billing and accounting capabilities within a single integrated solution.

### BENEFITS

- Increased billable hours by five percent with streamlined time and billing process
- Competitive advantage to help win and retain substantial clients
- Increased cash flow with an innovative collections process

First, the entire month-end closing procedure has been streamlined, which saves time and allows the team to distribute invoices faster. Before ProLaw, time input for the prior month would take a week or longer. “Now, all time is entered by 10:00 a.m. on the first of the month, and we can start cranking out accurate reports and prebills,” says Casey. “The entire process went from a week to just a couple of days, which is significant.”

The second benefit was a “surprise and a delight” to Casey. Because the staff was entering their time on a daily basis, rather than trying to recall how their time was spent at the end of the month, the firm experienced at least a five percent increase in billable hours each month. “Capturing time throughout the day made a huge difference. With this increase, ProLaw paid for itself in about five months!”

*“We now have large, substantial clients that would be difficult to keep if we had not invested in ProLaw. We are able to demonstrate that we can handle sophisticated and complex billing requests and manage very large cases.”*

Susan Casey

**Taking on Complex Billing Requests**

Rarely is there a request from a prospective or existing client that ProLaw cannot accommodate. With some invoices adding up to 8,000 pages and addressed to eight separate parties, an automated and flexible billing process is mandatory. “We often have very complex billing requirements from clients who want an invoice split in a billion different ways and in different formats. ProLaw has become a major marketing tool because it can easily handle even the most extreme client demands. This really helps set us apart from our competition,” shares Casey.

**Gaining an Edge with Superior Organization**

Another feature that gives Herzog Crebs a competitive edge is the ProLaw matter management solution, especially in plaintiff-heavy toxic tort cases. Not only do clients feel a level of assurance that their needs are met—from invoicing to reporting to deadlines—but the internal team also feels confident that they have a handle on every case-related

task. “ProLaw has automated our case management system, which naturally increases productivity. The team really benefits from the improved visibility into what’s going on at any given time on a case,” says Casey. “To be able to know the status of a case by extracting information with a few key strokes is pivotal for the team.”

**Innovative Use of ProLaw Enhances Collections Process**

Casey is a ProLaw power user. She knows the system backwards and forwards and is the “go to” person for any new request. This has given her license to be more adventurous with ProLaw functionality. In particular, Casey has developed a new and creative method of generating collection letters from the print statements window.

Casey wanted to improve the firm’s collections process in ProLaw. Customarily, collection letters are stored in the Events tabs, which meant users had to toggle back and forth between Ledger and Events to get a complete picture of the client’s payment status. “Because I work with a team of collections people, I wanted a single screen where anyone can view a client’s payment and AR status with a click of a button. It made sense for us to include collection letters along with cash receipts, write-offs and unapplieds since all of these items are part of AR history,” explains Casey.

To resolve this issue, Casey basically took the existing statement process in ProLaw and converted it to fit her collection letter needs. Instead of printing a statement, she uses the desired collection letter template—90-, 120- or 150-day letters, which are progressively more strongly worded—and runs the letter. This ensures the collection letter shows up in Ledger. “We’ve successfully used this process for several years,” says Casey.

In fact, management has a whole new perspective on their collections and cash flow analysis. They found that clients usually fall into one of two categories: Those that pay after they receive the 90-day past due letter (around 35-50 percent) and those that might need a more tailored payment plan.

Therefore, management instituted a new policy in which all clients received collection letters when they became more than 90 days past due. “This really made everyone more aware of the types of clients we were taking on and how to better communicate financial arrangements, because no one likes these letters going out to their clients,” explains Casey. “When management sees one of their clients on the AR aging report, they often proactively make phone calls to avoid their clients receiving a collection letter.”

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Susan Casey

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The firm has also experienced increased cash flow with the new policy. “After we send out a round of collection letters, we see a bump in revenue. It’s not always a huge amount, but even if we collect \$20,000, especially in this economy, it is time well spent,” she says. Casey would definitely recommend this type of procedure to decrease the number of clients in collections. “We looked into a third party to handle our collections, but then we thought, ‘why should we pay someone to handle a task that ProLaw enables us to do ourselves?’ Not only is it more cost-efficient, but we feel it is a less confrontational approach. It gives us the opportunity to build a closer relationship with our clients, which results in higher client retention,” she adds.

#### LEVERAGING THE PROLAW INVESTMENT

Casey and staff are finding more ways to leverage their ProLaw investment. They recently replaced their old DOS-based calendaring system with the ProLaw Dockets feature. “A centralized and automated docketing system definitely saves time and also meets our professional liability insurance requirement,” says Casey.

Since Casey also manages employee benefits at the firm, she has started testing the matter-level security features in order to set-up HR files for each employee where she can keep organized records of salary history, insurance, benefits and so forth. She believes if it passes the security test, it will be a way more efficient process than tracking these details in spreadsheets.

Finally, Casey is determined to turn her accounting department green. She has embarked on a one-year test to convert all paper documents into electronic files so she can get rid of the boxes of old paper invoices and financial records.

“I work with ProLaw 95 percent of the time, and I love it,” says Casey. “I am convinced that ProLaw is a major contributing factor to the growth and success of this firm.”

For more information about ProLaw, please call **(800) 977-6529** or visit [prolaw.com](http://prolaw.com).