

ELITE CASE STUDY

BERWIN LEIGHTON
PAISNER LLP

ELITE PAPERLESS PROFORMA TRANSFORMS PRE-BILL PROCESS



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TRANSFORMING PRE-BILL PROCESS VIA ELECTRONIC WORKFLOW

With over 1,000 employees, full-service law firm Berwin Leighton Paisner (BLP) is ranked in 67 legal areas in leading directories and has offices in London and five other locations around the world. Named "Law Firm of the Year 2010" (Legal Week and The Lawyer), BLP had the largest percentage growth in 2010-11 of the UK top 30 law firms.

Until recently, BLP's month-end client invoicing was often delayed due to many contributing factors that large law firms often face, such as long cycles for entering finalized time and for gathering approvals. According to Dan Wales, Finance Systems Manager at BLP, the biggest impediment to efficient billing was its paper-based process that encompassed a number of manual steps.

"We wanted to replace our time-consuming, manual pre-bill process with an online, paperless solution," explains Dan. With that goal, BLP, a long-time Elite® Enterprise™ and WebView™ client, adopted Elite Paperless Proforma™.

Paperless Proforma is an intuitive, browser-based pre-bill distribution and mark-up solution that directly integrates with Enterprise financial data. Paperless Proforma reduces the chance of human error, speeds the pre-billing process, and gets invoices out the door faster.

The firm's primary objective for Paperless Proforma was to fully automate and streamline the firm's current proforma generation and billing process in a seamless electronic workflow, thus eliminating manual steps. The secondary objective was to obtain 100% adoption across the firm

PHASED ROLL-OUT FOR HIGH ADOPTION RATE

The implementation plan for Paperless Proforma was deliberately designed to not only ensure a successful launch, but also to engage staff and managers in a

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Dan Wales
Finance Systems Manager

firm-wide adoption. The initial phase, which lasted approximately two weeks, encompassed remote installation of Paperless Proforma for a testing environment and training site for the billing staff. Dan and his team also developed about 15 customizations that included different proforma layouts and new workflow processes.

A pilot group across two practice areas, which included partners, fee earners, trainees and secretaries, was selected to use Paperless Proforma for two consecutive month-end cycles. This group generated and processed more than 2,000 online proformas and raised more than 1,100 invoices. Dan and his team were able to make continuous improvements on the workflow process and proforma layouts to meet the unique needs for each practice group. Because of Paperless Proforma's intuitive functionality, administrative and legal staff were competent with the system after only a 45-minute training session.

The firm was then ready to take the solution to a live environment and to a broader group of users. "The launch of Paperless Proforma has been very successful with a number of key business benefits being recognized. We have received lots of positive feedback from our user community," says Dan.

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BLP is a premier, full-service law firm headquartered in London that offers pragmatic, commercial legal advice to help major public and private companies, financial institutions, public sector bodies and private clients to achieve their goals. The firm's services extends to more than 65 jurisdictions, with offices in Abu Dhabi, Brussels, Moscow (Goltsblat BLP), Paris and Singapore, with a planned new office opening in Hong Kong in late 2011.

GOAL

To fully automate and streamline its proforma generation and billing process while achieving a high adoption rate from the user community.

WHY ELITE PAPERLESS PROFORMA?

It eliminates cumbersome and time-consuming, manual proforma distribution and mark-up procedures for both timekeepers and accounting staff.

BENEFITS

- Reduced the total billing process on average by 40%
- Cut paper used in the billing process by approximately 90%
- Saved around 60% on postage costs by routing pre-bills/invoices electronically
- Substantial reduction in invoice errors
- Gained ROI in two months pilot phase with initial 70 users to all 1,000 users

BENEFITS OF AN AUTOMATED PROCESS

Paperless Proforma transformed BLP's proforma process into an automated, online system that expedites the mark-up, review, and routing of draft bills. Through the solution's rules-based process, BLP has reduced the total billing process on average by 40%—the time it takes to generate the proformas to receiving the final invoice.

"Paperless Proforma replaces a manual process that once utilized a number of resources throughout the firm," says Dan.

Reduces Paper Shifting and Consumption

Dan estimates that the firm has made substantial savings in paper, postage and storage costs via the online workflow and routing mechanisms.

Meets Client & Firm Billing Protocols

During the roll out process, Dan and his team quickly learned that not all practice groups bill the same way, particularly when dealing with international clients and multiple jurisdictions. Customizing the pre-bill templates for each group proved to be time well spent. Paperless Proforma's out-of-the-box flexibility enabled the team to personalize the approval workflows at each BLP office, as well as accommodate different billing agreements made with individual clients.

Decreases Invoice Errors

Because Paperless Proforma is Web-based, lawyers upload edits directly in the draft system and send them back to the Billing staff instantly. Since no interpretation or re-keying of edits are necessary, the firm has been able to reduce the majority of invoice errors.

Simplified Compliance and Pre-bill Analysis

Audit trails on narrative, status and charging changes, along with the user, date and time of those changes, are automatically created for each pre-bill. Audit reports allow BLP to simplify its compliance with local government regulations. Audit tracking also identifies workflow bottlenecks with at-a-glance status viewing and produces statistics on open, submitted and archived pre-bills for management to stay on top of productivity and profitability.

Stability with Elite Integration

Paperless Proforma is tightly integrated with the BLP Enterprise practice and financial management system, which automatically extracts the hours worked for each invoice and feeds them into the pre-bill system.

For more information about Elite Paperless Proforma or additional Data Transformation Services, please call **(424) 243-2100** or visit elite.com.

