ENVISION
A COMPLETE BUSINESS MANAGEMENT SOLUTION FOR YOUR ENTIRE FIRM
Imagine a day when you have a single, all-inclusive business solution that works for your entire firm. A system that eliminates disparate systems and keeps your people, processes, and information working together. You finally gain real-time access to key performance metrics that give you an instant picture of the firm’s health to help make crucial business decisions. Imagine all of this coming with an implementation process that is easy, more cost effective, and automatic.

That day is here.

Envision is the law practice management software for today’s firms. It’s the one tool you need to gain and retain clients, keep you ahead of your competition, and run a smooth and profitable practice.

Envision is one of the most comprehensive, front- and back-office business tools available to help legal and professional services firms manage their entire practice. As part of Thomson Reuters Elite’s Enterprise Business Management Solution, Envision delivers seamlessly integrated modules that focus on financial management, client and matter management, risk management, and business development.

Built on Microsoft® SQL Server®, Envision provides revolutionary integration with Microsoft Office that lets everyone perform their daily functions in the software they are most comfortable. A user-friendly Web portal, mobile access, and cloud computing capabilities enable you to stay connected and agile in an ever-changing business world.

A complete, truly integrated legal practice, financial, and client relationship management solution, Envision provides the superior tools you need to keep every area of your business running smarter and more effectively. No longer do you need to sacrifice some departments for the benefit of others. Built-in workflows allow you to streamline processes and improve productivity in critical and strategic management areas of your firm. By delivering business advantage to all roles in the firm, Envision helps you stay ahead of the curve today and well into the future.

WITH ENVISION YOU CAN:
• Maximise firm profitability by streamlining your accounting and billing processes
• Capture more time and bill more hours with time and expense management that’s flexible, intuitive, and easy to use
• Enhance and expand your business with easy-to-use CRM and marketing tools
• Balance workloads and increase efficiency with software that works the way you do
• Improve decision making and instantly measure the health of your firm through real-time access to key performance metrics
A SINGLE, INTUITIVE PLATFORM

Built on the latest Microsoft technology, Envision delivers a complete business management solution that lets you streamline and improve your practice. The single, SQL database connects information across your entire firm in an intuitive and easy-to-use platform. Users benefit from the tight integration to Microsoft Office and Outlook® that lets them perform key tasks from the programmes they use the most. In addition, Envision provides a variety of access points such as the cloud, mobile, and a robust Web portal that keeps your business running smoothly from anywhere.

The Envision platform provides business process management tools and packaged integrations that enable you to easily customise the system to meet your firm’s unique requirements and work with commonly used third party applications. Its revolutionary install manager gets firms up and running quickly, easily, and for less money. The solution can be automatically installed for Web, application, and database servers providing standalone tools for validation and diagnosis.

MICROSOFT OUTLOOK AND OFFICE

One of the unique properties of Envision is its tight integration with Microsoft Office. It lets lawyers perform their daily project management functions in the programmes in which they feel most comfortable, such as Outlook and Word. Through a seamless set of extensions, fee earners can carry out time recording, billing, and a variety of case and matter management activities directly from within Microsoft Office. Say good-bye to the problems often associated with introducing unfamiliar law office management software. Instead, your team will embrace the familiarity whilst increasing productivity and efficiency.

- Record and view time
- Maintain and manage contacts and clients
- Perform end-to-end billing
- Work offline and benefit from automated synchronisation through the power of Microsoft Exchange

MOBILE

Get one-touch access to Envision’s powerful capabilities from anywhere, anytime using your iPad®. You can stay connected to your main offices and manage your business whilst on the go. Envision Mobile lets you access key functions, pull up matter and client information, and respond quickly to client queries. With Envision’s agile mobile time tracking, you can capture more billable hours and increase profitability.

ENVISION XTRA

In this increasingly competitive atmosphere, it’s crucial to maintain positive client relationships. Email is not enough anymore. An out-of-the-box extranet solution, Envision Xtra boosts client relationships, increases flexibility, and improves responsiveness by keeping you fully connected with your clients in a controlled and secure atmosphere. You can tailor views for your larger commercial clients and smaller clients and give them the ability to view up-to-the minute details of their cases, as well as selected documents.

- Share matter details, financial data, documents, and current status
- Customise views to each client
- Choose from real-time information or an offline version of the database

CLOUD SOLUTION

Cloud computing has become the norm for many businesses for several reasons. There are significant savings that can be attributed to cloud computing. For example, there is no need to buy your own infrastructure or specialist software, you can operate with fewer IT resources, and you can eliminate the perennial task of upgrading. You can increase and decrease your use in line with demand whilst benefiting from the best and latest technology. Take advantage of the opportunity to lower costs and reduce infrastructure requirements by deploying Envision in the cloud.
BUSINESS PROCESS MANAGEMENT

Envision helps you get away from outdated, time-intensive processes by providing robust workflow and business process management tools. With the built-in, rules-based workflow engine, you can automate and streamline key legal workflow processes and increase productivity, enhance client satisfaction, improve data quality, and comply with applicable laws and regulations as well as internal firm policies.

- Streamline your firm’s core business processes from end to end
- Automate key activities such as client matter inception, file closure, and other internal processes
- Amend standard workflow or create new ones with graphical workflow designer
- Design a process with drag-and-drop ease using task list template builder

APPLICATION INTEGRATION

Easily work with the applications your firm uses the most. Customisation options let you meet your firm’s unique requirements and work with commonly used third party applications. Integration packages are available for leading document management, document assembly, cost recovery, and legal forms solutions as well as bank reconciliation and electronic payment processing systems. Furthermore, Envision comes tightly integrated with Microsoft Office and Outlook.

REPORTING AND ANALYTICS

Keeping a constant pulse on all corners of your business is essential to maintain productivity and performance across your firm. Envision’s reporting and analytics features give you the real-time business intelligence you need to make crucial business decisions. The Key Performance Intelligence dashboard displays up-to-the moment metrics by individual, department, user, or detail. Easily drill down to details and create charts and graphs with a few simple clicks. In addition, the retrospective reporting function allows users to run reports comprised of additional criteria. Combined, these robust reporting capabilities enable management to measure high-level performance and assess the firm’s health in an instant.

- On-demand analytics give access to key performance indicators such as realisation, utilisation, and profitability
- Choose from more than 700 standard reports
- OLAP cubes deliver fast, multidimensional analysis of billing and ledger data
- Personalised dashboards help everyone in the firm stay on track
- Customised business prompts alert you to issues needing attention
FINANCIAL MANAGEMENT

Your finance team requires a reliable, intuitive, and efficient system to maintain a smooth-running and profitable firm. Built on a unified database using the latest Microsoft technology, Envision delivers robust financial management functionality to improve productivity, increase efficiency, and drive profitability. Flexible time tracking, billing, client and matter accounting, performance monitoring, and reporting capabilities help you streamline and automate your financial management processes.

TIME AND EXPENSE MANAGEMENT

Accurate time and expense tracking leads to increased profitability. With Envision, you can maximise the capture of billable time and expenses with a variety of options that suit individual work styles. Benefit from flexible, easy-to-use time tracking options, integration with cost recovery solutions, personalised dashboards, and reporting tools.

• Easily capture time on the go from your iPad with Envision Mobile
• Capture all client and matter related expenses, including both ad-hoc and soft costs
• Unique integration with Microsoft lets you record time directly in Outlook even when you’re offline
• Time sheet function lets you quickly complete daily time sheets
• Record and post time automatically and count on desktop time clocks to record time on matters as you work
• Personalised dashboards help you monitor your time entry performance against targets online, in real time

INVOICE MANAGEMENT

Envision’s invoice management tools are designed to increase billing efficiency and help improve the bottom line. It’s easy to create invoices to match multiple billing methods that comply with client demands. Automation helps you streamline the entire process to eliminate bottlenecks, improve collection efficiency, and ultimately increase cash flow.

• Draft bills can be prepared automatically through pre-defined schedules based on financial limits, frequency, or WIP balance
• Create bills easily in Word, even when working offline
• An intuitive Web-based interface helps you easily produce bills by walking you through the operations in a simple, logical sequence
• Easily monitor a bill’s status through Envision’s credit control system
• Reports and dashboards give you all the data you need in one convenient location

ACCOUNTING MANAGEMENT

Having an accounting management system that takes care of all your accounting needs, not just one or two, is critical in today’s world in which you need information immediately. With Accounting Management, you can streamline processes, increase management visibility and control over finances, and improve decision making. Robust online analytics and financial reporting tools provide deep insight into your firm’s operational performance.

• View KPIs for multiple dimensions and gain insight into real-time performance all from your desktop
• View hundreds of standard reports as well as fast multidimensional analysis of data for a look into every aspect of firm performance and management
• Ease month-end bottlenecks and speed ledger postings with transaction automation
• Integrated purchase ledger helps you control expenditures, improve cash flow, and add to your negotiating power
• Accounts staff can handle routine bank interactions quickly and effortlessly
Client and matter management is at the heart of what you do. Whether you’re responsible for the big picture or for the details, Envision makes it easy to manage the things that matter. Envision provides a centralised, firm-wide view of all client and matter activity. View a complete picture of each matter, including history and real-time data, from a single screen. Built-in workflow automates common matter management processes such as matter inception and file closure.

Robust matter management tools help you accomplish your daily activities and give you everything you need all in one place. Streamline business processes, case management activities, and document management and assembly tasks. Your case and matter management processes are tightly integrated with your Envision financial, CRM, and DMS systems for complete visibility from beginning to end. With Client and Matter Management, it’s easy to manage all aspects of your projects from inception to completion.

MATTER MANAGEMENT

Manage your work with powerful automation and full visibility. The workflow engine automates and streamlines your firm’s legal matter management activities and automates internal processes. Case management tools simplify tasks, maximise throughput, and ensure high quality.

- Modify workflows or build new ones to meet your firm’s needs
- Store, search, and retrieve all your case documents from a single virtual file
- Create high-quality, standardised documents
- Collaborate easily and securely with colleagues and clients using internal tools as well as the Xtra extranet system

LEGAL PROJECT MANAGEMENT

Big picture to small details, from inception to completion, you can manage it all with ease. Envision’s integrated matter estimating, budgeting, and tracking capabilities let you easily assess matter status and activity throughout the entire case lifecycle.

From the beginning, you can calculate an accurate quote, cost, and profit values using sophisticated matter estimating and monitoring capabilities. As you progress through the project, monitoring functionality allows you to view the progress against estimates and make necessary adjustments. Using Envision’s matter brief templates, you can create a quick and useful overview report on a matter’s status at any time. When you use the extranet solution, you can share status reports with project teams and clients in a controlled manner.

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No law firm is immune from the inherent risks of the industry. With each change that comes your way comes risk. Envision provides a rules-based workflow engine that includes out-of-the-box workflows for client and matter inception and other common business processes. These tools are here to help you mitigate risk and ensure compliance standards are met. Now you can stay on the track to improving business performance—confidently and securely.

A convenient, online client and matter inception process minimises the risk you face when taking on new business. It checks for duplicate entries, conflicts, and more. You can then easily view the results of a search and drill down to the underlying details to investigate and resolve conflicts quickly.

Envision also provides the sophisticated storage and management of physical and electronic records through the Strongroom and Matter Storage module. You can link electronic files to physical files for online viewing, and automated file history minimises the risk of losing or misplacing critical files.

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In today’s competitive market, you need tools that will nurture existing relationships and maximise new opportunities whilst differentiating yourself from the competition. Envision delivers. Marketing and CRM capabilities are fully integrated into the software, ensuring you have all the data you need in one single solution. You can mine relationships between contacts to identify opportunities for business development and cross-selling.

With Envision’s integrated solution, you can cultivate relationships with data that is easily shared throughout the entire firm. For example, when users enter and maintain contact data in Outlook, that same information becomes available for your CRM and marketing activities with Envision. You can track unlimited details for all entities, including contacts, clients, prospects, experts, suppliers, and more.

When you’re ready to develop targeted campaigns, it’s easy to manage your efforts, because you can perform bulk mailings, events, or data analysis with data pulled from the Envision database. You can be confident you have the latest information, and built-in task automation will streamline your follow-ups.

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ENVISION WORKS FOR EVERYONE IN YOUR FIRM

**Managers**
Measure business performance and meet client expectations whilst staying profitable.

As a manager, having instant access to reports and metrics is indeed crucial to knowing how your firm is performing. You want to easily view data in multiple dimensions to analyse performance in the way that best suits your needs. Envision delivers the tools you need to be confident in all of your business decisions. Stay on top of high-level performance and drill down to the details as you need them.

- Streamline operations by automating labour intensive practices
- Enhance data quality and consistency and simplify administrative procedures
- Improve working capital management with more efficient billing and credit control procedures
- Make informed and timely decisions with real-time measurement tools

**Case Managers**
Complete high volumes of specialist legal work whilst maintaining best practice standards and exceeding client expectations.

Each day, you’re faced with high case loads and the pressure to perform a number of tasks whilst keeping clients satisfied. Envision simplifies and minimises the time needed to perform case management tasks, maximises case throughput, and ensures high quality, uniform output. Rely on real-time data to make informed decisions that best meet the needs of the firm and your clients’ demands.

- Streamline case activities, including single and interdependent tasks with powerful workflow capabilities
- Review real-time performance with a focus on utilisation, realisation, and profitability statistics and look up details and performance against budgets and targets
- Monitor workloads through multiple views of individuals’ and teams’ current and future projects
- Reallocation tasks or entire cases directly from your desktop to even work distribution and ensure consistent staff utilisation

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**Fee Earners**
Manage all of your day-to-day tasks in a single, user-friendly system that’s designed the way you work.

You’re managing multiple cases in different stages with deadlines, client demands, and pressures coming from all angles. In order to stay on top of it all, you need to make the most of your time. Envision lets you easily and effectively complete your daily tasks, so you can focus on the things you need to accomplish. With seamless integration to Microsoft Office, you can record, bill, and handle client and matter management activities directly from the programs you use regularly. It eliminates the need to switch in and out of applications, improving your efficiency and productivity.

- Gain quicker, paperless, and more streamlined time recording, file inception, posting, billing, reporting, and document management
- Achieve your targets with the ability to monitor your performance in real time
- Provide enhanced client care capabilities with embedded, automated tools
- Access most recently used and favourite clients, matters, and contacts with a single click
- Review full financial details of clients’ current and past matters, including WIP, bills, and disbursements
- See all documents associated with clients and their matters, including scanned documents and images, emails, and attachments

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Envision is one of the most comprehensive, front- and back-office business tools available to help legal and professional services firms manage their entire practice.
Marketers and Business Developers

Win new business and meet the needs of existing clients efficiently and with ease.

With the pressure to constantly maintain current clients whilst finding new ones, being able to manage all of your marketing and client relationship information from one integrated system is a must. Envision provides a 360-degree view of your contacts and relationships, so you can easily identify your firm’s most valuable clients based on billings, receipts, profitability, and volume. It’s now easy to maximise business opportunities whilst ensuring that existing relationships are maintained and nurtured.

- Maintain a clean database with automatically de-duplicated data
- Track a complete history of all the firm’s dealings with any database entity
- Manage events from contact selection, mailing, and invitation management to ROI analysis
- Gain the capability to manage mailings—one-off or regular—for postal, email, and text messages
- Handle client care programmes from the initial identification of top clients, through the automation of follow-up activities
- Enter and maintain contact data directly through Microsoft Outlook

YOUR PARTNER FOR SUCCESS

Thomson Reuters Elite offers an end-to-end Enterprise Business Management Solution that allows law firms and professional services organisations to run all operational aspects of their firms, including business development, risk management, client and matter management, and financial management. As an industry leader for organisations across the globe, we understand the business and financial aspects of firm operations, and we have the tools to streamline processes, improve efficiencies, and provide the flexibility you need to change and grow your business.

For more information on Envision and its features, visit envision.elite.com.