

THOMSON REUTERS ELITE CASE STUDY BAKERHOSTETLER

OPTIMIZING BILLING SUCCESS THROUGH 3E CERTIFICATION

BAKERHOSTETLER

OPTIMIZING BILLING SUCCESS THROUGH 3E CERTIFICATION

THE FIRST TRAINING OF ITS KIND

The billing department of BakerHostetler is only 33 people, despite having more than a thousand fee earners located across 14 offices. Without a compartmentalized billing department in each location, the firm's billing coordinators are spread among offices in five regional billing hubs. This structure means that not every office has its own billing department and that many billing coordinators are responsible for servicing multiple locations.

As the firm transitioned from Enterprise™ to 3E® from Thomson Reuters Elite in 2014, it needed to develop training materials to help the billing team utilize a more comprehensive financial management system. At the same time, the firm was rolling out its regionalized billing structure, so it also became crucial to demonstrate that its billing coordinators would have the adequate skillset to meet each office's needs even when not physically present in the office(s) they were supporting.

To establish consistent firm-wide policies and procedures, BakerHostetler enrolled in the 3E Certification after discussions with Elite Education Services, a team of professional educators dedicated to providing clients with an array of quality prescriptive and customized training services and programs. Elite Education Services has been offering a boot-camp-style training for clients and partners since the launch of 3E.

Building off of a curriculum and implementation strategy developed by Source Consulting Group, BakerHostetler and Elite Education Services collaborated to build a first-of-its-kind customized training program specific to billing. The week-long program brings qualified instructors on site to equip the firm's billing coordinators with the specific, advanced skillsets they need to maximize their use of 3E. After four days of intensive, hands-on education in a classroom environment, the program concludes with a thorough examination that confirms billing coordinators' capabilities according to the firm's outlined expectations and confirms they can meet appropriate standards in performing daily tasks.

"We commend the expertise and professionalism of the Elite Education Services professionals who have accommodated our every requirement, all while making this a valuable and enjoyable experience for all involved."

Gunter Opaluch
Special Projects Manager

Through 3E Certification, the firm has successfully trained all 33 firmwide billing coordinators and local office accounting support personnel in two and a half years.

"Elite Education Services has invested a great deal of time and effort in helping us train and qualify a growing volume of billing staff to perform their jobs in the most effective manner possible," commented Gunter Opaluch, special projects manager for BakerHostetler. "We commend the expertise and professionalism of the Elite Education Services professionals who have accommodated our every requirement, all while making this a valuable and enjoyable experience for all involved."

To this day, the firm leverages the 3E Certification program to affirm that new billing coordinators have completed sufficient training, demonstrate proficiency, and understand the key concepts needed to effectively prepare and distribute bills. When the firm first rolled out 3E Certification, Theresa Mercicky, billing services manager, enrolled in the program herself. Today, the four-day training is done in-house by Billing Services Technology Manager Mary Roesch. Additionally, Mary travels to each office a few times each year to provide helpful tips and tricks.

BAKERHOSTETLER

Founded in 1916, BakerHostetler offers a broad range of legal services providing the depth and experience sophisticated clients expect. The national firm is ranked among the largest within the Am Law 100 and serves a variety of clients including 10 of the FORTUNE 25.

BUSINESS CHALLENGES

The firm needed a tailored training program to transition its billing department to 3E and provide ongoing onboarding support.

WHY 3E CERTIFICATION?

Elite provides world-class expertise, training and certification for its 3E clients specific to their roles and responsibilities.

BENEFITS

- Facilitated seamless transition from Enterprise to 3E
- Customized training and testing ensures optimal 3E use according to firm needs
- Supports remote collaboration
- Adaptable to evolving firm needs

“Elite Education Services taught us how to better educate and train our staff to succeed right out of the gate, and our continued success with 3E Certification gives our lawyers peace of mind that we are doing our due diligence in providing billing coordinators with essential skills to perform complex billing procedures,” explains Roesch. “That is especially important in that billing coordinators might not be based in the same office as the attorneys they support. It provides attorneys with an extra level of confidence in their billing coordinator.”

“Our continued success with 3E Certification gives our lawyers peace of mind that we are doing our due diligence in providing billing coordinators with essential skills to perform complex billing procedures.”

Mary Roesch
Billing Services Technology Manager

“Without 3E Certification, we really wouldn’t be able to get a sense of how effectively our billing staff is using 3E—it would be a leap of faith,” notes Mercicky. “Elite Education Services gave us a way to relieve any doubt, enabling us to quickly train new hires and get them up and running in various locations across the country with the utmost confidence.”

WORKING BETTER TOGETHER

A key motivation for the firm to move to a regionalized model was to eliminate silos and allow the workload to be balanced evenly. Previously, some of the firm’s smaller offices would only have a single billing coordinator with no support, but today, assistance can be seamlessly provided from one hub to the next. For example, if a billing coordinator is overloaded or sick, that person can ask for help and another billing coordinator can easily resume the task at hand within 3E.

“One of the greatest benefits of our 3E Certification is the consistency that it provides by teaching everybody to use the system in the same way,” Mercicky states.

3E Certification is conducted in small groups with billing coordinators from different offices, fostering direct colleague-to-colleague collaboration. Mercicky says that many of the billing coordinators are pleased to learn in such an interactive environment, rather than being left to figure out the processes and procedures for themselves.

“One of the greatest benefits of our 3E Certification is the consistency that it provides by teaching everybody to use the system in the same way.”

Theresa Mercicky
Billing Services Manager

“Establishing personal relationships in the beginning makes them more comfortable reaching out to each other after the class,” says Roesch. “We are not just working locally when we are in 3E—everyone is a part of a firm-wide team.”

Although the learning curve for billing is steeper than it used to be, Roesch says that most of the firm’s new hires do very well during training, and she has seen some phenomenal scores. In the event that a billing coordinator underperforms during testing, Elite Education Services professionals can help identify areas of improvement and suggest additional training to ensure that everyone is meeting and exceeding baseline expectations.

At the end of the day, Mercicky and Roesch say that 3E Certification continues to help the firm utilize the system to the best of its ability. For example, the firm offers a wide variety of template options, and they can expect billing coordinators to know how to use 3E to design invoices specific to client needs.

“Developing customized templates improves our ability to deliver invoices in a timely and accurate manner, and that opens up potential for faster revenue generation,” says Mercicky. “We can make it easier for the client’s A/P department.”

TRAINING FOR THE FUTURE

As the firm plans for its next 3E upgrade, Opaluch, Mercicky and Roesch are strategizing with Elite Education Services to optimize training programs for the new version, tailoring it to meet the firm’s evolving needs.

“There are going to be a lot of differences in the way the interface looks and acts, so part of our upgrade process is going to be looking at our training materials with Elite Education Services and conducting a substantial rewrite to incorporate the new features,” notes Roesch.

“Without a doubt, we will be able to get all of the pieces and parts in place for our billing coordinators to perform their jobs as efficiently and successfully as possible,” Mercicky concludes.

For more information about 3E Certification, contact Elite.education.services@thomsonreuters.com.

