



Mary Fraizinger, Chief Financial Officer — Gardiner Roberts LLP

3E CASE STUDY

Mary Fraizinger tells how Gardiner Roberts is going beyond basic practice management and providing more client value with 3E from Thomson Reuters Elite™.





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GARDINER ROBERTS LLP

Gardiner Roberts is a mid-sized business law firm that provides a broad range of legal services to businesses of all sizes. The diversified practice provides solutions and advice to clients in virtually every industry.

GOAL

The firm needed a practice management solution to support its strategic planning initiatives and enhance client service.

WHY 3E?

3E offers powerful core financial and practice management features and built-in application development capabilities in a single high-performance system.

FEATURES AND BENEFITS

- Flexible structure supports ongoing customizations
- Enhanced reporting provides more valuable insight to client data
- Billing collection times have been significantly reduced
- Improved client service with better analysis of their business

A KEY COMPONENT TO A STRATEGIC PLAN

Nearly 70 lawyers at Gardiner Roberts LLP help clients of all sizes compete in the global business environment. Established in the 1920s, the Toronto-based firm continues to accumulate broad expertise in a range of practice areas.

According to its Chief Financial Officer Mary Fraizinger, the firm’s primary goal is to provide high-quality service to clients that range from entrepreneurial businesses to larger institutional organizations. This ideology has determined and continues to determine the firm’s next course of action.

Fraizinger describes the structure of the forward-thinking firm as a “hub-and-spoke model.” The firm’s performance is driven by the different services offered, all of which are centric to their clients’ core needs. “If there is a growing client demand, we can add or replace a spoke to better support client success,” she adds.

Over the last decade, Gardiner Roberts has drastically expanded in both size and services offered to meet the greater needs of its clients. So in 2012, Fraizinger and her team determined that a technology infrastructure upgrade was necessary to support the firm’s continued acceleration. They needed a practice management solution that could support ongoing strategic planning and produce more meaningful metrics to help run the business more efficiently.

Fraizinger initially considered upgrading the firm's existing solution, but even with its added functionality, "it still wouldn't have been able to provide the results we required," she says. "It was evident that a new solution would improve our efficiencies, but we needed to extend far beyond the typical practice management functionality. We didn't just need a processing tool or a standard reporting tool, but a true strategic business tool to enable us to provide an exceptional quality of service."

This led Gardiner Roberts to select 3E from Thomson Reuters Elite because it could provide the technological sophistication required by a large firm, as well as the modularity to fit the firm's current and future needs. "3E provides a solid, flexible framework, backed by the reliable, ongoing support we needed to make our goals a reality," says Fraizinger.

Fraizinger and her team had many discussions with the 3E team prior to implementation to ensure that all their desired outcomes would be possible. "We knew we were going to have to invest much time and effort up front to achieve what we wanted. We were very pleased that the 3E team was ultimately able to tailor the solution to be exactly what we wanted."

3E offers powerful core financial and practice management features and built-in application development capabilities – all seamlessly integrated into one high-performance system. Designed from the ground up on Microsoft®.NET, 3E provides an integrated development environment that enables firms to become more agile in responding to client needs. A full suite of capabilities is delivered through a consistent Web-based user experience that allows staff to easily track and manage activity on a multi-office, global scale.

A TRUE BUSINESS TOOL

3E provides the necessary tools Fraizinger and her team need to gain deeper analyses into the strengths and weaknesses of their firm's client relationships over time. For example, they can easily trace client history to understand how or whether their efforts to "grow" a client account have been successful. This knowledge enables the firm's lawyers to have more proactive and valuable conversations with their clients.

Fraizinger elaborates, "With 3E opening more strategic lines of communication, our lawyers can better anticipate their clients' needs and therefore provide a higher level of counsel."

3E can also identify synergies across different practice areas within the firm. By combining complementary areas of expertise, client teams can now provide unique types of services. "We are now able to group different areas of expertise that allow us to target a whole new segment of the market," Fraizinger states.

To keep data organized, Fraizinger and her team have customized the 3E Dashboard into different sections. For example, one section shows an individual's responsibilities or personal statistics, while information relating to a matter or a client is in another. The Dashboard is also configured differently depending on a user's role, with separate configurations for managers and paralegals.

"The Dashboard is so simple to set up and use. It helps us track everything we need to know regarding clients and their matters," says Fraizinger.

The flexibility of the Dashboard enables Fraizinger and her team to make continuous improvements by adding new parameters. For example, they have added client alerts to keep team members up to date on their billing status against the budget. "We've got numerous layers that we can add to the Dashboard to make the team more effective, and we're looking forward to exploring more of these features."

"We have seen a two-week reduction in collection times since implementing 3E."

MORE MEANINGFUL REPORTING

According to Fraizinger, the flexibility of 3E's reporting and billing capabilities enables the firm to accomplish much more than ever before. These comprehensive financial features provide firm leadership with deeper levels of analyses into critical data, enabling them to make better informed business decisions.

Fraizinger says that her team "could never fly with the firm's old, cumbersome reporting tools." The system was consuming valuable time, requiring constant refinements to be made to even the most basic business reports. Furthermore, generating reports was an overnight process, and once they were in the system, they were difficult to access. Fraizinger and her team were often forced to do without reports that couldn't be produced or retrieved in time.

"With 3E, I can generate a huge report and it typically takes a minute or less," says Fraizinger. "Plus, dimensions can be tailored for each client, and we can create and access reports on the fly. I find this flexibility to be amazing, and it has truly made my job easier."



Billing automation in 3E has completely redefined the accounting department. Billing processes no longer require the same amount of oversight, and 3E has provided more than 100 customized billing templates for the firm's specialty cases. In fact, "We have seen a two-week reduction in collection times since implementing 3E."

Previously, bill templates were kept as separate documents that needed to be manually modified. This was putting the firm at an increased risk of billing errors. Fraizinger explains, "Now our data has full integrity from start to finish. Because we no longer have to resolve errors before bills are paid, the billing process is quicker and easier for both our clients and our firm."

"3E provides a much deeper level of visibility into our clients' businesses, which significantly increases the value we bring to them."

CONTINUING THE CLIENT COMMITMENT

Fraizinger believes that implementing 3E has resulted in a notable competitive edge. "From the beginning, our vision of 3E was all about client service, and it has ultimately enabled our firm to perform at a higher level." She explains, "The value of our firm is determined by the quality of service we give, so we are choosing to design our firm around how we can become and remain an extraordinary asset to our clients. 3E provides a much deeper level of visibility into our clients' businesses, which significantly increases the value we bring to them."

ABOUT THOMSON REUTERS ELITE

Thomson Reuters Elite offers a complete Enterprise Business Management Solution to run all operational aspects of your firm, including business development, risk management, client and matter management, and financial management. Using our integrated suite of offerings enables you to increase visibility and streamline workflow, ultimately improving profitability and exceeding your clients' expectations.

To learn more about 3E, visit elite.com/3E.

