

THOMSON REUTERS ELITE CASE STUDY JONES WALKER

RAPIDLY EXPANDING FIRM TURNS TO PAPERLESS PROFORMA
TO IMPROVE BILLING EFFICIENCIES



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STREAMLINING EFFICIENCIES THROUGH RAPID GROWTH

Jones Walker is a full service firm that works with a wide range of clients, keeping each of their specific needs in mind to achieve the best results in the most efficient manner. As industries and businesses experience constant change, so do the firm's lawyers, striving continuously to practice law with a high level of creativity and innovation to deliver the best possible legal representation.

Since its inception in 1937, Jones Walker has become one of the largest firms in the United States. Jones Walker has continued to see significant growth in recent years, with numerous acquisitions broadening its geographical presence with 19 offices. With this growth, the firm's billing department began producing upwards of 5,000 invoices each month. The use of a paperless pre-bill solution was particularly attractive because it would significantly reduce the bill production time, lower printing and delivery costs, and maintain the accuracy and quality of invoices.

Fortunately for Stephen Theriot, Controller at Jones Walker, he and his team didn't have to look very far for a paperless pre-bill solution. In addition to running Enterprise™, WebView™ and eBillingHub® from Thomson Reuters Elite, Jones Walker had already purchased Paperless Proforma™ as part of a suite of products. Paperless Proforma is an intuitive, browser-based pre-bill distribution and mark-up solution that directly integrates with Enterprise financial data. The solution reduces the chance of human error, speeds the pre-billing process, and gets invoices out the door faster.

"We had been keeping Paperless Proforma in reserve until the time was right to implement firm-wide," says Theriot. "The real motivator behind the rollout came when we realized that Paperless Proforma could provide a better overall experience for both staff and clients while allowing us to produce bills faster and more cost-effectively."

The firm's primary goal for implementing the solution was simple: increase the efficiency of the billing department. "We concluded that by decreasing the time spent processing each individual pre-bill, we could increase our capacity to process the submitted pre-bills," Theriot explains. "Faster bill production would allow us to generate and send bills to clients more quickly, ultimately improving our cash flow and billing cycle speeds."

IMMEDIATELY ACHIEVING EFFICIENCIES

Increasing Speed with Paperless Processes

The firm's goals for Paperless Proforma were quickly accomplished once the firm went live on the solution. Each member of the firm's billing team was able to process significantly more invoices than they could have previously, resulting in increased bill production speeds and capacity.

Previously, there was a duplication of effort during the review process in which the firm's fee earners would manually edit their pre-bills prior to sending them to the billing staff to process the revisions. In some cases, a second pre-bill would be sent back to the fee earners for another level of review. The ability to upload narrative changes to the time and cost entries directly in Paperless Proforma has completely eliminated this redundant process.

"By utilizing Paperless Proforma, we were able to more quickly generate and deliver pre-bills and improve attorney collaboration when reviewing them. We can then turn the submitted pre-bills into invoices much faster, which encourages attorneys to stay ahead of their billing."

Stephen Theriot
Controller at Jones Walker

JONES WALKER

Jones Walker serves local, regional, national, and international business interests in a wide range of markets and industries. It has more than 375 lawyers across 19 offices in Alabama, Arizona, California, the District of Columbia, Florida, Georgia, Louisiana, Mississippi, New York, Ohio, and Texas.

BUSINESS CHALLENGES

As the firm expanded, it began to require a paperless pre-bill solution to improve the speed, efficiency, and accuracy of its billing processes.

WHY PAPERLESS PROFORMA?

Paperless Proforma eliminates cumbersome and time-consuming manual proforma distribution and mark-up procedures for both fee earners and accounting staff.

BENEFITS

- Simplified processes increased billing speeds while reducing costs and improving client service
- Automated processes eliminated duplication and reduced risk of human error
- High level monitoring of billing processes improved billing efficiency
- Strategic rollout increased user confidence

“The edits to paper proformas needed to be very carefully scrutinized to ensure complete accuracy when the changes were processed. With Paperless Proforma, we can very quickly produce bills, because the narrative changes can be uploaded into the billing system without the need to retype them all,” Theriot explains. “By utilizing Paperless Proforma, we were able to more quickly generate and deliver pre-bills and improve attorney collaboration when reviewing them. We can then turn the submitted pre-bills into invoices much faster, which encourages attorneys to stay ahead of their billing.”

Theriot also says that the firm has done “a complete 180” in terms of its paper usage. They have significantly reduced the amount of time spent assembling hard copies of pre-bills that were routed to more than 100 lawyers in the firm’s main office alone. “Oftentimes when invoices are emailed, no paper is generated at all, reducing the amount of valuable time spent at the printer and mailing this information,” says Theriot. “Paperless billing processes are simply more efficient.”

The billing staff also prefers the automated production of invoices in Paperless Proforma, because there is much less risk for simple human error. “From the time a proforma is produced to when the final bill is generated, there is minimal need to work outside of the Paperless Proforma program.”

Greater Insight to Billing Activity

Paperless Proforma’s high-level view of the firm’s billing status has helped Theriot more closely manage the process. When new proformas are generated, he and his team are notified so they can both track the speed and volume of proformas submitted and address any sort of backlogs before they occur. “Since we implemented Paperless Proforma, the lack of backlogs in processing bills has been incredible,” states Theriot.

The attorneys and billing staff also have the ability to refer back to an audit log to answer any questions that arise during the review of pre-bills. This has enhanced the level of collaboration when reviewing time entry narratives and adjustments and reduced the need for follow-up phone calls and emails.

“The tracking of changes within Paperless Proforma provides our billing staff with access to the entire audit log of revisions to each pre-bill,” says Theriot. “This greatly improves our ability to research changes made to the pre-bills and answer questions, as well as ensure everything is in order prior to generating the bills.”

STRATEGIC IMPLEMENTATION PRODUCES LONG-TERM PAYOFFS

Theriot says that the success of Paperless Proforma would not be as great without the collaborative efforts of attorneys, legal assistants, IT department staff, and accounting staff during the initial rollout. As opposed to conducting a single, firm-wide conversion, the Paperless Proforma Implementation Team assisted the firm in conducting a beta initiative to determine the best approach to rolling out the solution firm-wide.

The beta initiative started with a small group of lawyers who were comfortable with the idea of using paperless proformas. “The goal of the beta rollout was to gather feedback to fine-tune both the product and our own processes,” explains Theriot. “We wanted to make it easy for our lawyers to review and edit their proformas so they could more quickly submit them to our Accounting Department for processing.”

After two months of accumulating feedback and making adjustments, a second beta initiative was rolled out to a wider group of users who expressed interest in going paperless. The conclusion from both beta trials was that it would be most effective to implement Paperless Proforma separately to each practice group, month by month, until the entire firm was using the software.

“We have a number of attorneys and practice groups, and we didn’t want to overwhelm our resources by having everyone be set up and trained by the same hard deadline,” explains Theriot. “Rolling out Paperless Proforma incrementally was easier to manage because we didn’t have to strain our resources beyond what we could handle at any given time.”

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Stephen Theriot

Theriot considers the support of executive management during the beta initiative and the firm-wide implementation to be the catalyst that has allowed the firm to take advantage of all the benefits Paperless Proforma has to offer. "Because the beta initiative went so smoothly, many lawyers who were initially hesitant to use Paperless Proforma have become its biggest supporters," claims Theriot. "We've received more praise about Paperless Proforma from our staff than we ever would have expected. Once they realized how they could more effectively manage their workloads with all of Paperless Proforma's tools, they quickly came on board," he adds.

Further down the road, Theriot and his team anticipate upgrading Paperless Proforma to the 4.0 version. He looks forward to the more comprehensive integration with eBillingHub that enables new functionality, such as the ability to validate entries against the eBillingHub guidelines for various clients and establish workflows to simplify the approval process for bill adjustments.

To learn more about Paperless Proforma or for a global list of office locations, visit elite.com.

