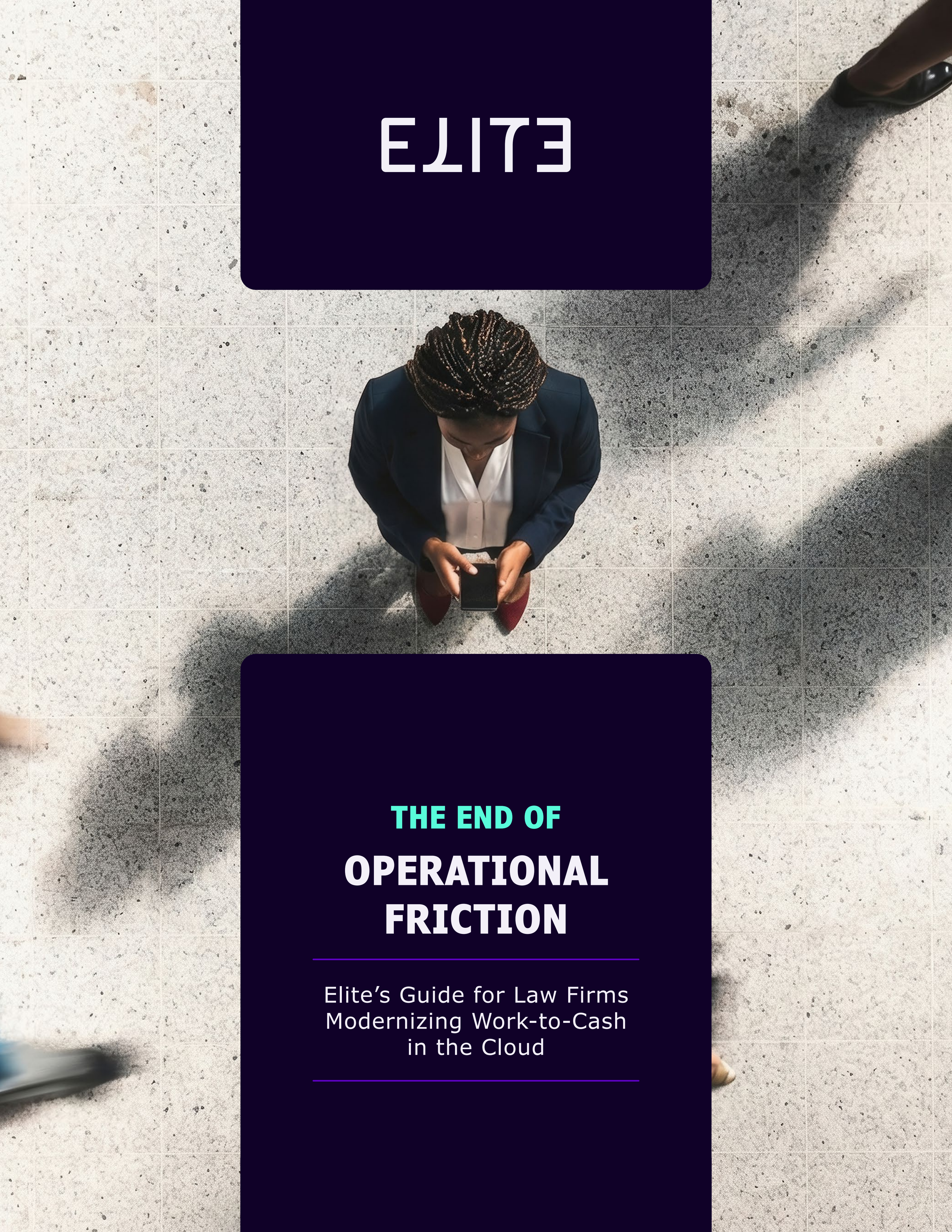


A high-angle, top-down photograph of a woman with dark braided hair, wearing a dark blue blazer over a white collared shirt and red pointed-toe shoes. She is standing on a light-colored, square-tiled floor and looking down at a black smartphone held in both hands. The background is a blurred office environment with other people's legs and feet visible, suggesting a busy professional setting. Two dark blue rounded rectangular boxes are overlaid on the image: one at the top containing the word 'ELITE' and one at the bottom containing the title and subtitle.

# ELITE

## **THE END OF OPERATIONAL FRICTION**

---

Elite's Guide for Law Firms  
Modernizing Work-to-Cash  
in the Cloud

---

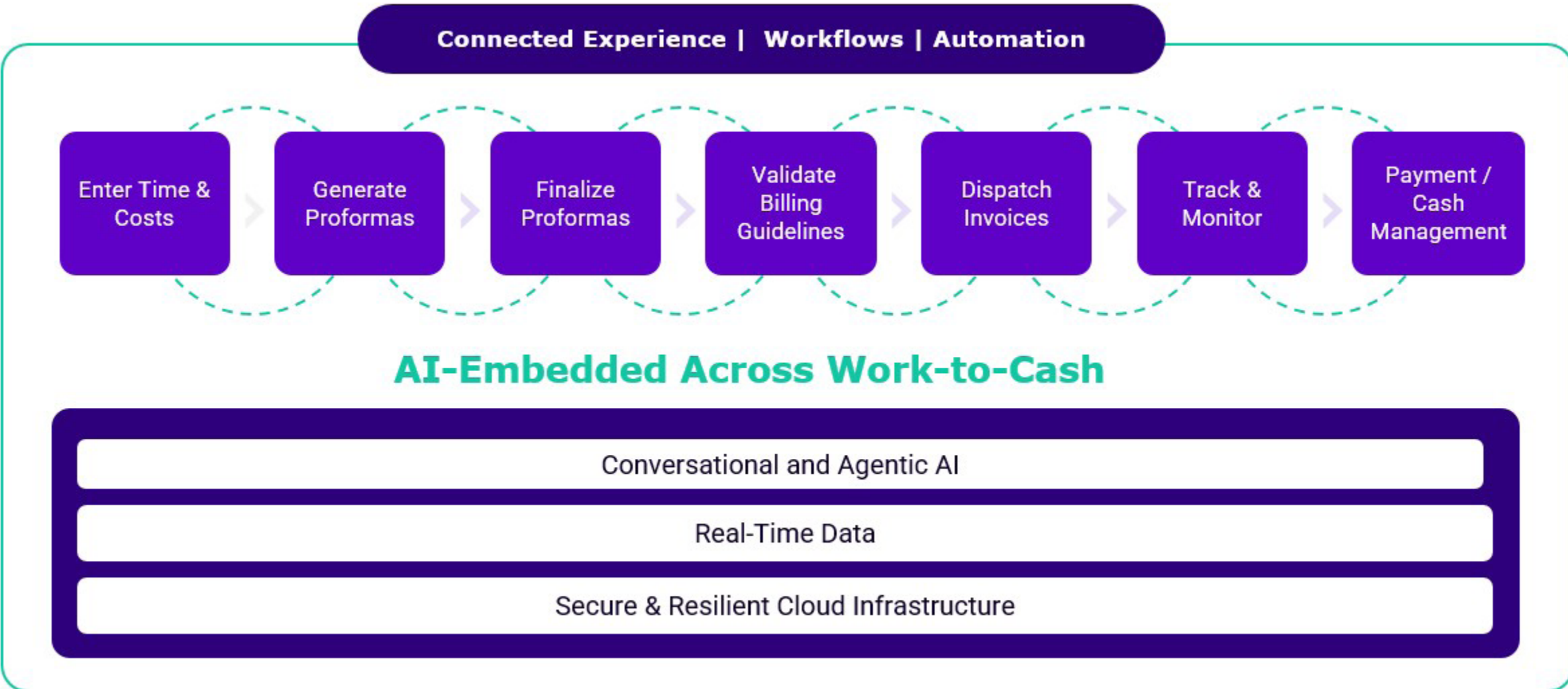


Operational friction for law firm leadership looks like slower billing cycles, realization pressure, extended days outstanding, administrative strain, and reduced predictability in working capital. It occurs because financial workflows are still structured around batch processing, manual intervention, bolted-on, point solutions and a spider-web of various tools to complete financial analysis in a business environment that now demands real-time data visibility—the speed only AI can provide—and tighter control.

**ELITE** | At Elite, we are experts in automating law firm financial management and business operations. Our goal is to eliminate operational friction across the full work-to-cash lifecycle. Not through incremental fixes or point solutions, but through a single connected AI-enabled SaaS platform.

## Elite: The Automation Platform for Law Firm Operations

One connected SaaS experience powering the work-to-cash lifecycle



# WHAT DOES FRICTION LOOK LIKE FOR FIRMS?

Operational friction is the cumulative operational drag created when work, data, and financial decisions move at different speeds. It is usually the byproduct of legacy systems operating in batches, requiring manual intervention between signal and action.

## Where Friction Lives

Operational friction compounds across every step of work-to-cash



Firms forfeit **15%-25%** of revenue due to operations (Law.com)

## The fallout of friction typically appears as:

### Non-billable administrative time

Lawyers and billing staff spend significant hours reconstructing time, reviewing proformas manually, or correcting downstream errors.

### Delayed or inconsistent financial insight

Leadership often waits days or weeks for accurate reporting, limiting the ability to intervene before revenue impact becomes permanent.

### Rework across billing and compliance workflows

Invoice corrections, rejections, and reconciliation tasks create avoidable delays in cash realization.

# ELITE'S LATEST INNOVATIONS REDUCE FRICTION, UNLOCKING UP TO 40% HIGHER PROFITABILITY



**AI-Powered Efficiency  
for Lawyers**



**Connected,  
Actionable Data**



**Seamless Global  
Compliance**



**Unified Experience Across  
Time, Payments, Invoicing**

## What's New:

1. Elite's Data Fabric: Data Connect
2. Elite Intelligence in Proforma
3. Payments: Multi-Bank & Trust Support
4. Always-On Time Capture with Microsoft Teams
5. Global E-invoicing Compliance



# THE END OF DATA FRICTION

Elite's Data Fabric: Data Connect (powered by Microsoft Fabric)

## Data Connect: Real-Time Reporting via Microsoft Fabric to Accelerate Analytics

Data Connect delivers near-real-time access to trusted 3E data through a secure shortcut into the firm's Microsoft Fabric environment, eliminating months of custom data work and ongoing data pipeline management, enabling faster, better financial decisions when they matter most. This is made possible by the streaming data and real-time processing of Elite's Data Fabric, a SaaS-only capability of the Elite Platform.



### Core Capabilities

- Near-real-time access to 3E financial, billing, WIP, AR, and profitability data
- Secure, read-only access delivered directly into the firm's analytics environment
- No custom ETL, no fragile integrations, no duplicate data movement
- Retains full historical data—today's answers without limiting tomorrow's use

### ROI & Outcomes



Faster answers on profitability, utilization, AR, and cash flow



Near-real-time visibility replaces next-day and end-of-month reporting



Eliminates Excel reconciliation and manual data fixes



Reduces dependency on custom integrations and IT resources



Improves confidence in profitability, cash flow, and forecasting

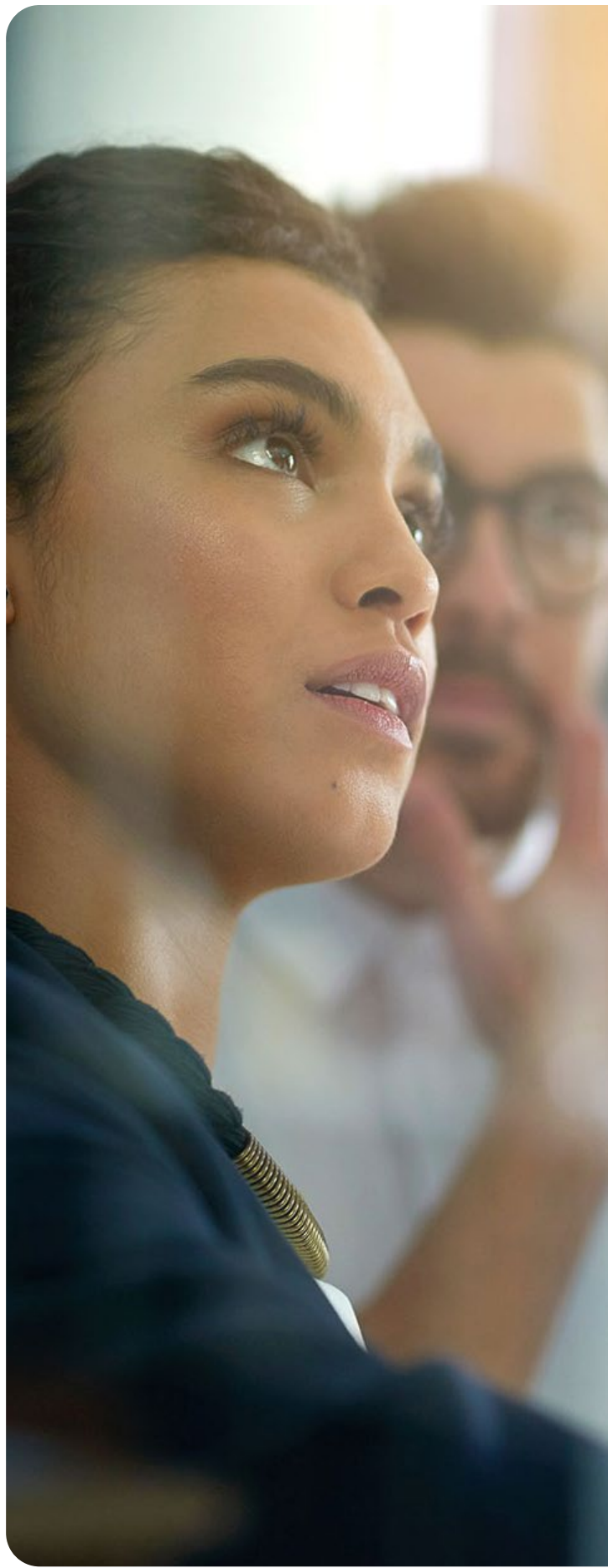


Lowers operational risk and audit exposure

### How it Works

Elite creates and manages a secure, read-only shortcut from its cloud 3E data into your firm's Microsoft Fabric environment.

Elite handles the infrastructure, security, governance, and continuous updates—so your team gets near-real-time access to trusted financial and billing data without building or maintaining data pipelines.



Microsoft Fabric is only as valuable as the data flowing into it. Elite's Data Connect is what makes 3E financial data usable inside Fabric—continuously, securely, and without custom engineering.

[Let's Talk](#) about the Future of Your Firm

# THE END OF BILLING FRICTION

Elite Intelligence in Proforma

## Embedded AI Turns Proforma Review into a Billing Accelerator

Proforma review sits directly between recorded time and revenue, yet it is still handled as a manual, lawyer-driven task. Elite’s Proforma solution now embeds Elite Intelligence directly into this step, reducing the time and cost of review while improving consistency. The result is faster billing, fewer corrections, and more predictable revenue flow—without changing firm controls.



### Core Capabilities

- AI task delegation lets lawyers find and modify proformas at scale to save critical time in the billing process and get back to their main job...practicing law
- Ask questions of your data to make faster decisions in proforma edits without waiting on colleagues
- Lawyers review only what requires judgment, not every bill
- Utilize our prompt library for common AI use cases and frequently asked questions to get started quickly

## ROI & Outcomes



Fewer lawyer hours spent on low-value billing tasks



Faster movement from time recorded to invoice sent



More predictable billing behavior across practices and partners



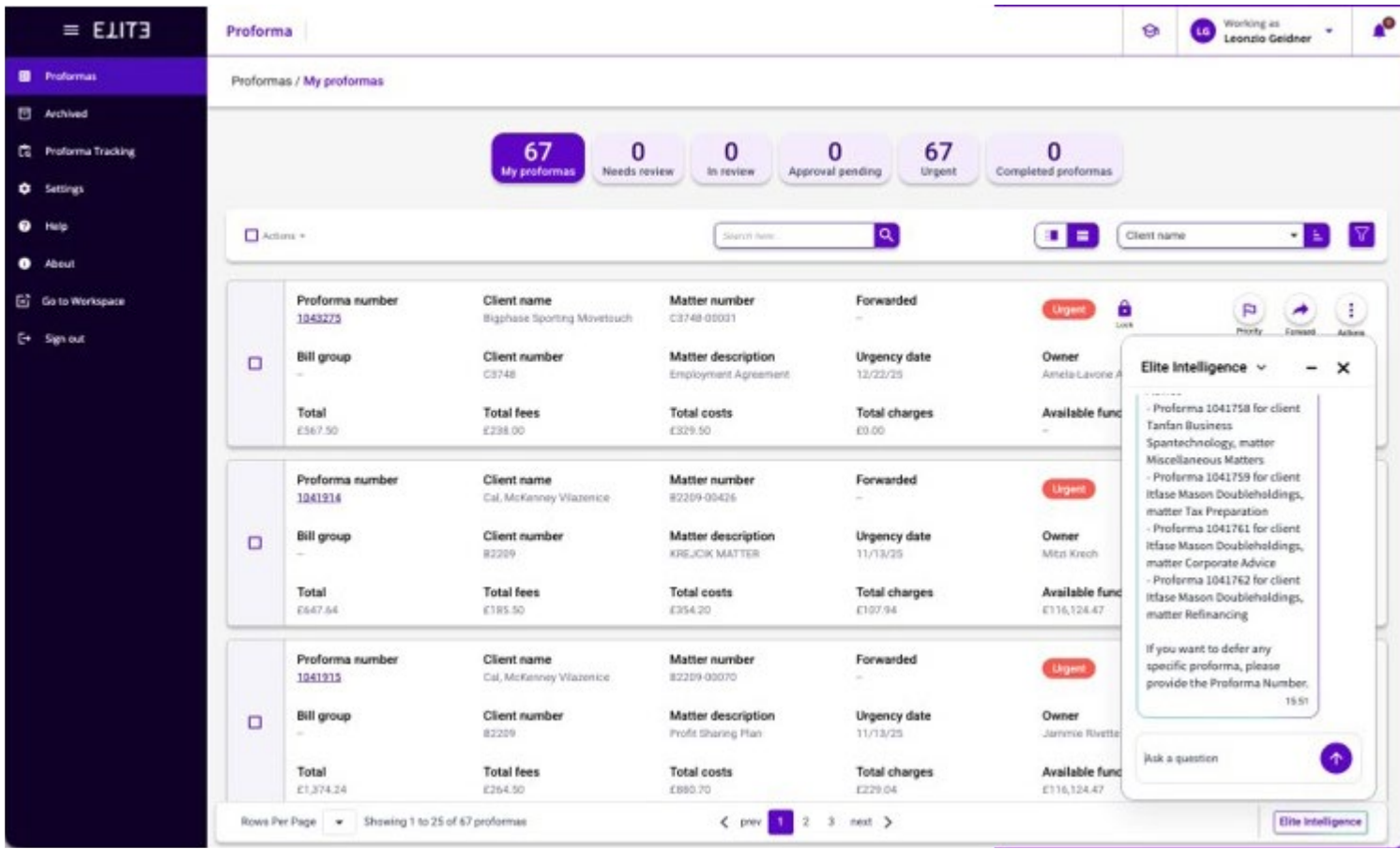
Lower internal cost per invoice and improved cash timing

## Elite’s AI Approach

Elite Intelligence is embedded, not bolted on, and reflects our approach to AI: apply intelligence directly inside critical workflows to reduce effort, improve consistency, and deliver measurable business outcomes—without changing firm controls

## How AI Advances the Value of Elite’s SaaS Platform in Proforma

- 01** Moves Elite beyond a system of record to a system that actively guides billing decisions inside a revenue-critical workflow
- 02** Delivers AI-powered improvements continuously through the cloud, turning platform updates into immediate operational gains
- 03** Reduces high-cost manual billing work while preserving existing approval controls and governance
- 04** Improves billing speed and consistency at firm scale by reducing variation, rework, and late-stage corrections
- 05** Demonstrates a practical AI model focused on measurable outcomes—time saved, bills sent faster, and more predictable results



## Let’s Talk about the Future of Your Firm

# THE END OF PAYMENT FRICTION

Payments: trust and multi-bank account support

## Payments: Critical Infrastructure for Work-to-Cash

The latest update expands Payments with multiple-bank account routing and trust payments at checkout, giving firms ultimate control to ensure money moves accurately at scale. As payment volume, trust complexity, and audit scrutiny increase, these capabilities deliver immediate improvements in cash handling, reconciliation, and compliance—making Payments a high-impact investment.



### Core Capabilities

- Precise control over which operating account receives each payment, providing flexibility for supporting complex firm structures.
- IOLTA-compliant trust deposits and retainer payments natively in Elite Payments.
- Trust cash receipts tracked directly in 3E, making reconciliation to matters, offices, or practices dramatically easier
- Improves payment accuracy by reducing downstream correction and cleanup.
- Payments reach the right operating account immediately, freeing up revenue sooner and improving overall liquidity.

### ROI & Outcomes



Reduces payment friction across operating and trust workflows



Reduces manual effort in cash application, reconciliation, and settlement



Auto-routing ensures Finance teams spend less time routing funds internally



Increased automation enables higher-value financial strategy and client work

### Why This Matters Now

Payment complexity has outgrown single-bank, manual workflows.

As firms scale, hidden payment friction slows cash timing and drags down finance productivity.

This release makes Elite Payments immediately valuable by removing a core operational bottleneck—making it a natural next step for cloud customers and a compelling reason to modernize payments now.

## Elite Payments Is How Firms Get Paid—Accurate, Fast, at Scale

As firms modernize and scale, payments have become the weakest—and most consequential—link in work-to-cash. Elite Payments modernizes how money moves, removing friction that directly impacts cashflow, compliance, and finance capacity.

Elite Payments improves cash timing and finance efficiency by removing friction after the invoice is sent.

### 01 Avoid pitfalls of generic solutions

Elite Payments is built for true client flexibility, supporting cards, bank payments, pay-later, and both trust and multi-bank environments. Every payment is routed and applied correctly at the point of transaction, reducing misapplied cash, manual corrections, and the audit exposure that generic payment tools create.

### 02 Improve cash flow and efficiency

By reducing manual receipts, reconciliation effort, and internal transfers, Elite Payments shortens the path from invoice to usable cash and frees finance teams from ongoing cleanup work that scales with volume.

### 03 Modernize without disruption

Elite Payments works seamlessly with your existing billing structures and approval workflows, delivering immediate operational and cash flow benefits—without retraining lawyers or reworking firm policies.

[Let's Talk](#) about the Future of Your Firm



# THE END OF TIMEKEEPING FRICTION

Always-on Microsoft Teams time tracking

## Always-On Time Capture Eliminates Missed Billable Work—Now in Microsoft Teams

As legal work shifts to always-on collaboration, Time applies AI directly to how lawyers work—continuously capturing activity, interpreting it intelligently, and turning it into accurate, billable time without requiring manual work. And now, that intelligence is extended into Microsoft Teams with automatic, always-on meeting time capture.



### Core Capabilities

- Automatically captures time spent in Microsoft Teams meetings and calls based on actual meeting duration, with no start/stop action required from the timekeeper
- Uses AI to generate accurate draft time entries from captured meeting activity, reducing reliance on memory and post-meeting reconstruction
- Applies billing rules and validation logic at the point of entry, improving time quality before it reaches proforma review
- Delivers more complete, compliant time into billing workflows, reducing downstream corrections, write-downs, and rework
- Unifies time capture, AI assistance, and billing compliance inside 3E, rather than relying on disconnected time tools or manual fixes

### ROI & Outcomes

- ✓ More billable time captured automatically
- ✓ Faster progression from work performed to billing
- ✓ Fewer write-downs and billing corrections
- ✓ Reduced administrative effort for lawyers and billing teams

### Why This Matters Now

Time is the primary input to revenue, yet an increasing share of billable work happens in meetings that are under- recorded or missed entirely.

Capturing that time automatically improves realization, shortens billing cycles, and reduces downstream cleanup—without requiring behavior change from lawyers.



**Let's Talk about the Future of Your Firm**

# THE END OF COMPLIANCE FRICTION

E-invoicing embeds and standardizes compliance into billing globally

## Built-In E-Invoicing Compliance Protects Firms From Rising Regulatory Risks

Governments are moving e-invoicing from optional to mandatory, with enforcement and consequences for delays. Elite now embeds country-specific e-invoicing compliance directly into the billing process, allowing firms to meet regulations without slowing invoice submission or adding manual work.

### Core Capabilities

- Elite now supports mandatory e-invoicing in regulated markets, starting with Belgium and expanding to Poland.
- Compliance is delivered through Edicom, a certified global tax authority network, embedded and managed directly by Elite.
- Invoices are automatically formatted, validated, and transmitted to tax authorities as part of billing.
- Once enabled, invoices for regulated jurisdictions follow the correct compliance path by default.
- Compliance shifts from a manual checkpoint to a built-in property of billing.
- Alleviation of the IT team to build integrations

### ROI & Outcomes

-  Faster invoice clearance in regulated jurisdictions
-  Fewer rejected or resubmitted invoices
-  Reduced manual compliance effort for billing and finance teams
-  More predictable cash timing where tax validation is required

### Why This Matters Now

When invoices cannot be issued until tax authorities validate them, compliance directly determines cash timing.

By embedding compliance into billing through Edicom and managing it natively within Elite, firms can meet regulatory demands without slowing billing operations or adding new systems as requirements continue to expand.



**Let's Talk about the Future of Your Firm**



# ELITE

**FAST PAYMENTS.  
SMART WORKFLOWS.  
GLOBAL SCALE.**



Talk to an Expert

Elite.com

Elite® and 3E® are registered trademarks of Elite; all other trademarks are property of their respective owners.