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DESIGN GALLERY BOOSTS BILLING EFFICIENCY AND
CLIENT SATISFACTION

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BOOSTING BILLING EFFICIENCY WITH DOCUMENT AUTOMATION

Ridout & Maybee LLP consistently ranks as one of Canada's top IP firms in both Canadian and international surveys of in-house counsel. The firm provides clients with the strategic guidance and counsel they need to protect and leverage their valuable IP assets, including some of the world's most innovative technologies.

In 2012, the firm implemented Enterprise™ from Thomson Reuters Elite for its comprehensive financial management capabilities. During this transition, the firm's implementation team considered integrating additional Elite products and ultimately decided to invest in Design Gallery™, a document automation solution that streamlines the collection, conversion, and distribution of data.

The firm's original goal for implementing Design Gallery was to take advantage of its robust inventory of invoice templates; however the solution has since benefitted the firm in far more meaningful ways. According to Ridout & Maybee's Director of Human Resources and Accounting Melissa Bellocchi-Hull, the firm has also leveraged Design Gallery to eliminate an ongoing challenge with the firm's billing processes.

With the firm's decentralized billing, the billing process prior to Design Gallery involved several manual steps, including printing and scanning invoices to upload bills to the firm's document management system. Because invoices were being printed and mailed out to the majority of client's, postage costs were high. Being able to produce a soft copy of the invoice has cut down on the administrative time spent preparing invoices and uploading them to the document management system.

"Design Gallery's automation has not only provided substantial savings in time, but also improved our billing accuracy by eliminating the risk of human error."

Melissa Bellocchi-Hull
Director of Human Resources and Accounting

By leveraging Design Gallery's advanced Automated Data Transformation design, the firm is now able to automate billing processes so data is retrieved directly from its Enterprise system and invoices are automatically converted to Microsoft™ Word® and saved to the document management system. Modifications can be made instantly and effortlessly by retrieving these readily available documents before sending to the client.

"Because so much time was previously dedicated to managing billing practices, it is a huge benefit that we no longer have our staff manually scanning and mailing bills," Bellocchi-Hull explains. "Design Gallery's automation has not only provided substantial savings in time, but also improved our billing accuracy by eliminating the risk of human error."

Design Gallery is a document automation solution that streamlines the collection, conversion, and distribution of data within the Elite Enterprise and 3E® systems. The sophisticated capabilities of its advanced Automated Data Transformation design provide more speed and flexibility to support specific and often varied business processes by transforming data into a variety of formats and distributing it quickly and efficiently.

RIDOUT & MAYBEE LLP

Ridout & Maybee is a Canadian intellectual property law firm boutique with 100 staff located across offices in Ottawa, Toronto, and Mississauga.

BUSINESS CHALLENGES

The firm needed a document automation solution to customize invoice templates to meet client billing requirements.

WHY DESIGN GALLERY?

Design Gallery is an automated data transformation solution that quickly and efficiently streamlines the collection, conversion, and distribution of data.

BENEFITS

- Document automation eliminated manual and time consuming billing processes
- Flexible invoice configurations meet evolving client demands
- Smooth implementation with reliable ongoing support

“Billing is such a huge component of our client service, as well as cash flow, so we make it a priority to comply with each client’s requirements. Design Gallery has made that possible for our firm without having to invest in any additional technology.”

Melissa Bellocchi-Hull

MEETING CHANGING CLIENT DEMANDS

Implementing Design Gallery aligned with the firm’s goals of becoming a paperless firm and further improving its ability to meet its clients’ electronic billing needs. As the e-billing trend continues to grow, Bellocchi-Hull has noticed that clients’ invoicing needs are becoming more and more individualized. Since going live on Design Gallery, she and her team have been able to better service their clients and comply with their various billing needs.

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With Design Gallery, Bellocchi-Hull and her team are able to incorporate several invoice customizations using user defined fields and overrides to produce invoices according to clients’ exact needs. For example, Design Gallery recognizes when an invoice needs to be converted to a different currency or when it needs to produce a LEDES format. Additionally, overrides can be used to trigger Design Gallery to show total accounts receivable balances and add in specific client purchase order numbers.

“Design Gallery offers many wonderful capabilities, but these small detailed features are what really have made the difference at our firm,” Bellocchi-Hull states. “Complying with client service, usually with little turnaround time, is one of the greatest benefits we have received from Design Gallery. Not a lot of firms can say that they can do that.”

COLLABORATING FOR LONG-TERM BENEFITS

When implementing Design Gallery, Bellocchi-Hull and her team made it a priority to get the solution up and running as quickly as possible, minimizing any billing downtime. They met with the Design Gallery team and were able to design template formats that would adhere to clients’ billing requirements in a matter of days. Bellocchi-Hull elaborates, “Meeting face-to-face with the Design Gallery team helped us develop templates that met our exact requirements, yet with even more enhanced functionality.”

In fact, Bellocchi-Hull would say working with such a knowledgeable team is one of her favorite things about using Design Gallery. “Once my team and I gained a thorough understanding of how Design Gallery functioned, we had no issues running the solution,” she describes. “I was really impressed by how the Design Gallery team was able to make the implementation as seamless as possible for our firm.”

Since going live on the solution, Bellocchi-Hull has been able to collaborate with the Design Gallery team to overcome new obstacles and meet changing client needs. A few enhancements have been made since the roll out, and Bellocchi-Hull and her team are confident in the solution’s ability to resolve any challenges as they arise.

“Design Gallery has a lot to offer our firm, and we look forward to working with its team to explore the solution and see how it can benefit us further,” Bellocchi-Hull concludes.

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Melissa Bellocchi-Hull

For more information about Design Gallery, please call **+1 800-977-6529** or visit **elite.com**.

