

SPONSORED EDITORIAL

Briefing¹
SMARTER LEGAL BUSINESS MANAGEMENT

Support for agility

How is software supporting firms to change and thrive through uncertainty?



LEGAL SUPPLIER
ALLIANCE

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Like so many businesses, law firms are facing an intensely challenging time for the remainder of 2020, and likely beyond. The reality is it remains to be seen how well technology projects and investment from years previous can help them to drive the all-important engines of efficiency, productivity, engagement and service quality in this period of prolonged quarantine and isolation.

Meanwhile, communication and collaboration are clear themes for us in these troubling times – and firms need to have a network of specialist partners and suppliers supporting them who are also in regular contact to support and understand one another. Lessons should be shared. Mindsets, as well as systems, need some integration. That is what the Legal Supplier Alliance – whose members here outline the parts each of them have to play in making a success of the current remote working world – has as its overriding aim.

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CTS: Empowering your agile workforce with cloud

Although we have worked in partnership with law firms for over 12 years, we had not truly experienced how business-critical our services were to the sector until now: secure and immediate access to data and applications from any device, anywhere, at any time, has been a game changer for our clients.

Law firms are currently reviewing their business models, cost bases and working structures. Post-Covid-19, how will firms automate collaboration, processes and communications while continuing to engage staff and deliver an excellent client service?

Cloud-enabled firms have the advantage of remote access to desktops and business-critical software, from practice management to dictation, putting them ahead of less agile competitors; and increasing the likelihood they will come through this period hitting the ground running.

Having the right infrastructure is key to enabling remote working. This is where CTS has seen our cloud-enabled clients make the transition to a remote working model effortlessly. "Our partnership with CTS has meant that our technology perfectly aligned with our business-continuity plan, resulting in a seamless transition to remote working for nearly 200 staff members," said CTS client Napthens Solicitors.

As a cloud and managed IT provider, our primary role is to empower firms with the right technology and a secure, high-performance platform that drives excellent client service. The flexibility of a subscription-based cloud model has also enabled firms to be hugely responsive to changing circumstances, which has never been more important.

Seddens Solicitors' migration to the cloud, in 2019, improved staff performance, cost savings and flexibility.

And leveraging CTS's Managed Cloud service allowed them to spend more time analysing how people work and finding appropriate solutions to drive efficiency and improve their processes, which has been a huge advantage to their business-continuity plan over the last few weeks.

Working from home has several proven benefits, including reduced overheads, higher productivity and boosted morale – under normal circumstances. However, communication between teams and departments throughout the firm can be a challenge.

Cloud collaboration tools, such as Microsoft's Office 365 and Teams, can eliminate the barriers created by physical distance, enabling users to communicate effectively and work on shared documents in real time, increasing efficiency and streamlining workflows.

The sector can already take away some very real insights from this crisis; some elements of firms' technology will have transitioned well to remote working, whereas others have caused significant issues.

As we transition to a 'business as usual' state in the new world post-Covid-19, we expect IT departments to move their focus away from day-to-day management of IT infrastructure to end-to-end digitisation of processes and operations, taking on a strategic role that adds value for the firm, and outsourcing more of the operational running to a sector-specific cloud provider. Cloud-enabled law firms will be able to implement new technology faster, enable innovation, and attract and retain talent by providing a superior platform that enables staff to work more flexibly, productively and efficiently.

Whatever the next few months bring, the crisis will undoubtedly further drive the adoption of cloud-based services to enable remote and intelligent working. ▀

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CTS

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For more information, visit:
www.cts.co.uk

Cloud-enabled firms have the advantage of remote access to desktops and business-critical software, from practice management to dictation, putting them ahead of less agile competitors

DMC Canotec: Are you agile enough?

As the full implications of Covid-19 start to be felt across the legal industry, and as we take our first tentative steps to reopening offices, the need for greater resilience and agility in our business model and service delivery has become paramount. And it has brought two important questions to the fore: just how agile is your firm, and is it enough?

This last couple of months have been the biggest experiment in agile working the world has ever seen, challenging the status quo, potentially for ever, and making us look even closer at how we do business, how we enable and support our staff, and how we serve and support the clients. What have we learned, what has to change, how do we make our firm stronger as we exit?

Is this the Rubicon moment for agile working and the agile law firm? With the challenges of social distancing rules, travel restrictions, staff wellbeing and safety guidelines all adding to the mix, longlasting change is inevitable, but with it comes opportunity. To paraphrase Darwin, it is not the strongest that survive, nor the most intelligent, but the ones most responsive to change.

For the last five years DMC Canotec has been driving the agile agenda with our popular AgileFirm events sharing best practice and customer insights on embracing change. Over 200 firms attended this year. For now these events are virtual, such as the launch of our forthcoming AgileExpo series and regular AgileToolkit webinars, but the advice, insight and experience gained from partnering with over 100 of the UK's leading firms, allows us to share a proven path to enabling effective digital transformation and the agile law firm.

Our latest seven-step guide, The New Workplace, offers practical tips for a safe and secure return to the workplace,

supporting a hybrid workforce, where many will still, for now, be working from home as the new norm.

Agile in action

We recently worked with two top firms on their agile/digital transformation strategies.

Weightmans – Digital Mailroom, MatterSphere workflow

“The solution has enabled Weightmans to deliver documents directly into digital workflows to support our users, wherever they are – a secure, agile, collaborative and efficient service supporting the continuity of service to our clients, despite the challenges we all face right now. DMC Canotec, Paper River and Weightmans worked really well together and developed a real camaraderie. From 85% of our firm being in an office on any given day we had fewer than 15 people across eight offices within a week, with everyone supported and working effectively from home” – Stuart Whittle, partner and head of IS and operations

Withers Worldwide – Digital Mailroom, iManage workflow and Managed Print Service

“Our Paperlite Document Solutions from DMC Canotec have been a game changer for agile working, especially right now during these most challenging of times, enabling us to deliver documents and information quickly and efficiently in an electronic format so our lawyers, secretaries and other support staff are able to work remotely from anywhere. This proved to be extremely helpful at the start of the crisis and helped Withers move to full remote working far quicker than would have been the case without the technology” – Peter Gibbons, global head of facilities

David Newman
Director
DMC Canotec

 @dmc_canotec


For more information, visit:
www.dmcplc.co.uk

What have we learned, what has to change, how do we make our firm stronger as we exit? Is this the Rubicon moment for agile working and the agile law firm?

ComXo: More efficient operations from home

ComXo is a legal sector specialist providing agile, remote working and ‘workplace of the future’ managed communication solutions for top-tier law firms.

The Covid-19 crisis and lockdown have seen customers successfully squeeze a three-year agile workplace roadmap into three weeks. While it has been a very busy time, it has also given insight to many ambitious firms as to what the future operational structure of their business will look like.

Here are four things our clients are considering, and how we are enabling them:

Maintaining exceptional client experience, no matter what

In a crisis you need your trusted advisers on hand, and giving easy access to that help, 24/7, helps clients to be fast and responsive as a situation changes. ComXo’s 21st Century-managed legal switchboard enables firms to offsite their entire workforce while guaranteeing an exceptional client experience when they call into a firm. Combining 30 years’ experience and the very best technology, process and people, ComXo guarantees an unrivalled first impression that will mean you never lose a new business opportunity or frustrate an existing client.

Cutting unnecessary costs quickly

The last few weeks have put the spotlight on ‘old workplace’ things that are not necessary to run an efficient firm. Examples include in-house telephone switch, desk phones and direct dial-in numbers; an in-house switchboard function; in-house videoconferencing suites; inefficient use of expensive office space and meeting rooms; travel and expenses of course; and oversized onsite

IT and facilities teams. ComXo’s clients outsource all or part of these functions, delivering a better internal client experience and massive savings on overheads. The challenger firms of the future will offer clients more value because their overheads are a fraction of those at a traditional firm.

Driving fee earner productivity

There can be more time doing client work and less time lost to the frustration of getting things done. Every six minutes saved sends earnings straight to the bottom line. ComXo’s Gateway is an integrated, managed, business services app, giving access to all business services on every remote worker’s mobile phone. No matter where you are, or the time of day, if you need to be transferred, an FAQ answered, helpdesk support, or a service booked, you simply press a button and your ComXo Virtual Personal Assistant will get it done. ComXo clients turn non-productive time into client billing time, driving profits into partner pockets.

BCP is now BAU

Sadly, the post Covid-19 world will never be the same. Firms do need to be ready to react to similar threats, potentially on a regular basis. Structuring global offices to be always ready to react means supporting remote working as business as usual. The key to being ready is centralised data sources, integrated services, a 24/7 global managed capability, and an ‘always on’ support function that enables a seamless switch from office to remote. The ComXo Global Communications disaster recovery solution provides the world’s largest most complex law firms with this capability. It meant the recent move to a fully remote workforce was easy to invoke and one major hassle they did not have to manage. ▴

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ComXo

 @ComXoLtd


For more information, visit:
www.comxo.co.uk

Structuring global offices to be always ready to react means supporting remote working as business-as-usual. The key to being ready is centralised data sources, integrated services, a 24/7 global managed capability, and an ‘always on’ support function

DocsCorp: Stay productive and secure during the Covid-19 crisis

We appreciate that while it isn't business as usual, many firms want to maintain essential services for their clients and local communities. We are here to help.

Our software makes legal document workflows more accurate, efficient and secure for remote workers. Many of our desktop applications are also available either in the cloud or on-premise, making it easier to find the right solution for your environment.

pdfDocs for paperless pdf workflows, digital signatures and more

Staff working from home won't always have the same access to hardware like printers and scanners. That's why efficient, paperless workflows are more important than ever. With pdfDocs, users can complete essential document workflows without needing to print or scan. They can apply redactions, digital signatures, Bates numbering, stamps, annotations, and more, to single documents or document sets.

pdfDocs binder enables quick and paperless pdf binder and closing book creation. Rather than printing and scanning multiple copies, add new or amended documents as you go, and output to a single file when you're done.

compareDocs for accurate legal document comparison

Small changes in legal documents can make a big difference, so it's essential that users have reliable access to precise comparison technology while working remotely. DocsCorp's compareDocs makes it quick and easy to compare up to five versions of a document for changes, while support for track changes makes reviewing the changes a straightforward task.

Moreover, compareDocs cloud delivers the same comparison capabilities to mobile users. It's accessible in Microsoft Word on any device, including Mac, iPad and tablet. And, to support firms during the Covid-19 crisis, it's available to use free for 90 days.

cleanDocs for secure emailing

Legal documents are full of sensitive metadata. In order to prevent unintentional data breaches, cleanDocs scrubs email attachments before they are sent outside the firm. And cleanDocs desktop also offers an email recipient checking functionality that ensures emails are sent to the right person and with the correct information.

Then, cleanDocs server works in tandem with cleanDocs desktop to scrub metadata in emails sent from mobile devices, or it can function as a standalone solution. Cleaning is automatic and can be customised to suit enterprise security policies. And to help firms protect users while they are working from home, cleanDocs server is also now available to use free for 90 days.

Training and support

Adjusting to remote working can stretch the resources of any organisation a little thin. So, to help make working from home more manageable, multiple new training resources are now available. These include on-demand training webinars for all applications; quick training videos for users who need to learn how to use a new feature or a new application at home; and quick training guides, with step-by-step instructions on essential workflows, like converting from pdf to Word in pdfDocs, comparing Excel files with compareDocs, or cleaning metadata with cleanDocs. ▶

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For more information, visit:
www.docscorp.com

Rather than printing and scanning multiple copies, add new or amended documents as you go, and output to a single file when you're done

iTrain Legal: Socially distanced learning for your implementation

We're now living and working in a world that has changed forever. No one knows what is going to happen, what the macroeconomic impact will be, or how long it will last. These are challenging times to be implementing new systems in a law firm.

Given the pace that firms have needed to use to migrate to remote working, lawyers have quickly adapted to using technologies such as Microsoft Teams and Zoom, and become more self-sufficient in their working practices. In the provision of legal services, some new norms are already starting to manifest themselves. Longstanding views that lawyers had to work in an office environment, that law courts couldn't be online, or that lawyers could not function without large business support teams to assist in service delivery have been debunked in just a few days.

For the legal sector, the genie is now out of the bottle and it will never go back in.

How law firms manage IT system implementations and upgrades is very much up for debate, and one of the key areas where face-to-face is seen as an imperative is training. Do we have to accept that these projects must go on hold because of the current restrictions?

iTrain Legal, a specialist legal IT training solutions provider, believes that carefully planned remote learning programmes can be as effective as face-to-face training, and that firms may also even look to these methods in the longer term.

The constraints of remote working can lead to great learning experiences when designed thoughtfully with the person at the centre.

Training delivery is already now seen as being only a part of a change programme that law firms undertake,

meaning that there is flexibility to deliver training, blended with communications. Customised bite-size videos and e-learning can be interspersed with interactive training, webinar delivery and collaborative sessions. These solutions are time-efficient, so enable more training activities to be spread out, culminating in a learner feeling ready and confident in tackling the new system.

Even floor support can be delivered remotely, with clever systems employed to ensure that every person is virtually visited by a trainer.

Perhaps the most important innovation is the AI chatbot technology in support of training needs that we have introduced to the legal tech industry. The chatbot delivers instant answers to 'how do I?' questions that feature so heavily in the first weeks of rollout, and can refer to a real floor support trainer if required.

Furthermore, our chatbot can proactively contact people, checking knowledge and confidence levels with the system, and crucially then respond with the right support where needs are identified. It's accessed through Microsoft Teams and continues to provide training support long after the physical trainers have gone.

We would therefore urge firms that, if training is your only barrier to change, to think again, as new ways of training will be part of the new norm.

Wherever the legal sector ends up in the next few years, law firms will need to innovate, to think differently and to accept new ways of working. Those who start this process sooner are likely to do better overall. ▶

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For more information, visit:
www.itrainlegal.co.uk

How law firms manage IT system implementations and upgrades is very much up for debate, and one of the key areas where face-to-face is seen as an imperative is training. Do we have to accept that these projects must go on hold because of the current restrictions?

Hubshare: Improving client service productivity from home

Hubshare is a secure digital workplace portal that enhances client engagement through collaborative working, secure file sharing and project management. Businesses can quickly and easily tailor each portal to their client or project needs and provide users and external parties with a branded and customised platform.

With the move to mass homeworking Hubshare is an ideal platform to aid productivity within internal teams, but even more so in terms of improving client service.

Teamwork

With your teams working remotely it is paramount you are all moving in the same direction to deliver the best client service. No longer can you go to the paper file, or turn to the person next to you, for an update. Having a centralised client area where you all work is key to keeping the whole team up-to-date and avoiding duplicating work.

Anytime, anywhere

Each centralised portal is where sensitive documents can be shared, stored and accessed, anytime, anywhere. In addition to the file-sharing element, users of Hubshare can track project progress, ensuring targets and deadlines are met, as well as having an overview of their project. This dynamic and optimised interface means you can easily visualise and manage your workload, view progress and assign additional tasks to users.

Keeping your clients continually informed of the latest document versions, a task's status, or matter spend, can waste valuable time and resources. Being able to proactively provide an online service that delivers all this seamlessly by integrating with your

internal systems is key.

Integration

Integration is at the heart of Hubshare, be that with your document management system (DMS), practice management system, Office or digital signature. Having a platform that has integrations with many legal-specific solutions is paramount for delivering exceptional client service.

With options for one- or two-way synchronised integrations with your DMS, it is effortless to transfer your files straight from the DMS into specific client portals. Our automation process can build a client portal from a company template, syncing files and users as a matter is created in the DMS without you needing to lift a finger.

Within each client portal the dashboard allows you to present a full overview of a matter or project, including presenting financial data that is pulled directly from your financial systems – a great way to keep clients up to date with budgeting and current spend.

Security

Depending on company preference and data compliance regulations, Hubshare can be hosted in a multitude of locations, meaning you have control over where your data resides, whether this is in the cloud, on one of our five secure Microsoft Azure data centres, on-premises, or even in your own data centre. In addition, with two-factor authentication, single sign-on and high-grade encryption, your documents and data are always secure.

Maximise your company's productivity, stay connected and stay secure. ▲

Damian Jeal
Co-founder
Hubshare

 @HubShare


For more information, visit:
www.hubshare.com

Having a centralised client area where you all work is key to keeping the whole team up-to-date and avoiding duplicating work

Paper River: Better ways of agile working in the new normal

For some law firms, the Covid-19 pandemic and ensuing lockdown have finally and forcibly broken the paper chains that used to bind secretaries and fee earners to their desks. For these firms, this tiny virus has finally achieved something no end of strategic recommendations, nor the marketing of tech companies like us, ever could. Firms have been forced to enable agile homeworking practically overnight. At Paper River we have seen many firms struggling with new ways of working, and the challenge of even just getting paper documents and post distributed as digital documents to the appropriate legal teams and fee earners. That struggle is also reciprocated on the output side, where print room services and office printing are no longer accessible.

For other firms this has been much less of a bumpy ride, merely accelerating the adoption of specific technologies and agile ways of working that were already in place. We have now seen many of our clients reaping unexpected benefits from their prior investments in fluid workplace technologies.

Paper River has long advocated agile, flexible working and joined-up 'smart' business processes. Fear of change no longer matters, and the implementation of new automated digital process adoption has now been mandated by influences beyond the status quo stance of the most resistive legal firm.

Whether it is digital mail room, multi-channel information ingestion, collaborative document-bundle creation, e-ticket requests for office services, or a digital outbound mail review and approval process ... it can be done. It has been done by many firms already and they are reaping additional benefits now over and above the original business case.

Once an organisation begins to get a

taste for better ways of working and the benefits of enabling technologies, that is often a prompt to review all their assumptions about ways of working and what could be working better.

One small practical Covid-19-induced example of this was with one of our international clients, where we transformed their process from physically printing draft bills out of Elite to a digital process that captures the print stream and sends the document as a pdf attachment by email to the relevant secretary or fee earner. This solution has proved enormously beneficial.

Coming out of this crisis we are expecting to face a whole new set of questions and challenges from our customers. The post-lockdown world will definitely not be the same as the pre-lockdown world. The changes will permanently impact the way lawyers work and the way that law firms are structured. They will want to know how technology can support and ensure compliance within the organisation. This will be especially true of those firms without suitable digitising solutions, who have effectively waived their security and General Data Protection Regulation (GDPR) policies to be able to continue to work at all during the lockdown. Finally, we predict that law firms will increasingly appreciate the role of technology as an enabler and driver of value and profitability.

The storm clouds of this pandemic have not yet passed, but maybe there are some silver linings on the distant horizon. It turns out that the benefits of solutions that enable agile work also provide crucial operational resilience. A physical disaster recovery office would be hopeless in the current situation, but a 'work from anywhere' technology capability is saving the day for many firms. ▀

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For more information, visit:
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Whether it is digital mail room, multi-channel information ingestion, collaborative document-bundle creation, e-ticket requests for office services, or a digital outbound mail review and approval process ... it can be done

Ten10: Remote service provision, in testing times

In today's remote working climate, most organisations are having to adapt to new ways of working, collaborating and communicating when delivering IT change. This presents very significant challenges to delivery dates and evolving business priorities.

What can we do for you?

- Industry-leading functional and non-functional testing
- Highly technical test automation and performance-engineering services
- Strategic advice and planning
- High-quality software testing and quality engineering resources to complement your teams.

How can we do it?

Our UK- and US-based permanent workforce of software testers and quality engineers are vetted to industry standards.

- Our consultancy, services and people are supported by 'Tenology', our internal delivery, management and governance framework.
- Critically, we can deliver our full range of consultancy and software-testing services remotely, utilising a wide range of collaboration and videoconferencing platforms, connecting to customer environments using laptops encrypted to the highest security standards.
- We provide free-of-charge initial planning and familiarisation as part of our commitment to demonstrating effective capability and services and building trust.

Our experience

- Over 50% of our engagements have traditionally been delivered remotely, so we know what works, and more importantly what doesn't.
- Regardless of your delivery environment, we have the capacity, expertise and knowledge in leverage tools and techniques to mobilise and provide effective offsite delivery, be this collaborative, agile teams or standalone test phases.

We bring with us in-depth, sector-specific knowledge of typical technology platforms, applications and integration requirements. Through our dedicated legal sector team, we can provide you with strategic advice on these technical challenges and your future roadmap.

Consultancy

Our talent, expertise and pragmatic approach will give you the confidence to fully embrace technological change. We will effectively plan and incorporate testing into your software development lifecycle and long-term product roadmap.

Project-based test consultancy will ensure the right approach, tools and resources are selected, and in place, to achieve a smooth and successful test delivery. The Ten10 legal sector consultant team meets clients' exact requirements, from sector-specific experience through to proficiency across particular technologies and tools.

Managed services

Project-based and ongoing managed test solutions are delivered through our permanent, talented UK- and US-based remote delivery teams.

Our expert-led blended teams enable the necessary skills and capabilities to be employed while remaining a cost-effective solution. ▶

Chris Ash
Associate director – client services
Ten10

 @Ten10_UK



For more information, visit:
www.ten10.com

Project-based test consultancy will ensure the right approach, tools and resources are selected, and in place, to achieve a smooth and successful test delivery

Thomson Reuters: Cloud-based legal tech has its day

As the world reels from the challenges of slowing the transmission of Covid-19, law firms across the globe need to both connect virtually and continue to meet client needs – all while addressing a new set of legal issues tied to the virus.

Every law firm is likely to feel the strain to one degree or another, but some are unquestionably better equipped for the current reality. The day-to-day aspects of matter management and financial workflows have become a challenge for firms unprepared for a workforce separated by distance and distraction.

In the spectre of a pandemic, remote collaboration tools are having their day.

Now more than ever, firms must manage their legal processes and business performance

With so much time apart, it's important to capture and share the vitals of the workplace, ensuring that important tasks and responsibilities don't fall through the cracks.

Take, for example, a single legal matter. Law firms without a standardised workflow and cloud-based project management system may suddenly find themselves unable to answer even the 'five Ws':

1. What matters are being worked?
2. Who is working on them?
3. When was the last task executed?
4. Where are the documents relevant to the matter?
5. Why were certain actions taken?

The need to access the facts of your firm's work and business easily, in real time and from anywhere, has always been deemed critical. This is truer today than ever before as law firms across the

globe need to balance the ongoing needs of their clients with the immediate financial health of their business.

When your workforce is dispersed, find connections. Enable collaboration


Now probably isn't the perfect time to swap out everyone's technology or processes. But if your firm has an unusually dispersed workforce, look to cloud-based legal technology to help – 3E Cloud from Thomson Reuters provides firms with the technology they need in this fast-moving atmosphere through a streamlined implementation, and its remote capabilities for fee earners make it a double-win.

For the lawyers

Matter maps, included within Thomson Reuters Panoramic, combine the know-how of Practical Law with an orderly, customisable workflow. Not only are lawyers able to see the preferred processes their firm follows, users can copy existing matters as a basis for their work. Think of it as a kickstart – in precisely the right direction.


For the ledger

For law firms navigating uncertain waters during volatile times, up-to-date financial data is key. Firm leadership needs detailed, accurate and immediate information to measure daily business metrics and to effectively model and make changes quickly. Advanced financial reporting solutions from Thomson Reuters support firms with budgeting, forecasting, reporting, accounting, and more.

Your team can adjust to the new normal. Thomson Reuters can help. Contact us today. 

Patrick Hurley
Vice president – customer advocacy
Thomson Reuters

 @EliteLink


For more information, visit:
www.elite.com

With so much time apart, it's important to capture and share the vitals of the workplace, ensuring that important tasks and responsibilities don't fall through the cracks

Wilson Allen: Time to transition to digital billing – top five reasons

Has there ever been a time when the pain of paper-based proforma management processes was more evident?

Unlikely. Law firms that have made the transition to digital are experiencing little to no disruption as a result of working from home. Those who are still transitioning are feeling the impact in spades, driving many to conclude that now's the time to prioritise digital billing. Here are the top reasons why:

Greater speed and accuracy of bill preparation

Collecting input from timekeepers on a timely basis can be difficult, leading to delays in billing and inaccurate invoices that are rejected by clients. With Wilson Proforma Tracker, for example, firms gain a controlled workflow and a simplified user interface to enable the timely and accurate preparation and validation of proformas. The software integrates with Elite Enterprise and 3E to provide access to real-time time and billing data, reducing manual input and minimising the inaccuracies caused by the re-keying of information by multiple users.

Lower shipping and labour costs and billing service improvements

A digital proforma management process speeds up the bill generation, distribution and review process by enabling finance teams to track and manage all stages of the billing lifecycle. Lawyers can quickly review and mark up proformas from their desktop or mobile devices, eliminating the need to print, collate, ship and recollect paper. Billing teams can focus on higher-value tasks such as improved client delivery and service for invoices and collections.

Timelier billing

Billing delays lead to increased write-downs. Therefore, firms can significantly improve financial health and performance by simply streamlining the work-to-bill lifecycle. There is less work in progress at the end of the month, and more time included in each proforma. Plus, digital proforma collaboration improves visibility into the overall status of the firm-wide billing lifecycle. That means finance teams can take appropriate action when necessary to identify and remove bottlenecks and get bills out the door more quickly.

Better compliance with clients' billing rules

Many clients have complex billing requirements, which can be difficult for lawyers and staff to follow. Additionally, with increasing use of e-billing, firms have to follow more rigorous rules. Manually reconciling a high volume of draft bills can significantly complicate and extend billing cycles. Software that natively integrates with your firm's financial management system and external validation systems makes it easier for your firm to adhere to client guidelines.

Improved realisation

What's the bottom-line benefit of making the transition to digital – literally and figuratively? Clients appreciate the timelier delivery of accurate invoices that comply with billing rules, which should translate to quicker cash collection and improved realisation rates for your firm.

Making the transition to paperless processes can be challenging without the right technology and a realistic change management plan. ▴

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Wilson Allen

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For more information, visit:
www.wilsonallen.com

A digital proforma management process speeds up the bill generation, distribution and review process by enabling finance teams to track and manage all stages of the billing lifecycle



The key ways to succeed with remote working
Visit: www.comxo.co.uk/remoteworking



Managed Cloud
Visit: www.cts.co.uk



Agile toolkit
Visit: www.dmcplc.co.uk/agile-toolkit



pdfDocs
Contact: info@docscorp.com



Hubshare
Contact: info@hubshare.com



Remote and face-to-face IT training solutions
Visit: www.itrainlegal.co.uk



Ten10
Contact: chris.ash@ten10.com



3E Cloud
Visit: legalsolutions.thomsonreuters.co.uk/en/products-services/elite.html



Wilson Proforma Tracker
Contact: info@wilsonallen.com



FlowMatrix
Contact: flowmatrix@paper-river.com



Do you need a next day delivery that's guaranteed?

**Your documents are sensitive,
urgent and business critical.**
Our tracked services provide
delivery reports, online tracking
in real-time, and with next-day
delivery by 9am as standard.

For more information
email exchange@thedx.co.uk
or visit dxdelivery.com/exchange

