

CLIENT TESTIMONIAL

McCarter & English

Achieving A Two-Week Digital Billing Transformation Ramping Up the Rollout of Wilson Proforma Tracker at McCarter & English

McCarter & English, LLP, is an American full-service law firm with offices from Boston to Washington, D.C. Founded in 1845, it is one of the oldest law firms in the United States. The firm's 400 attorneys provide legal services to around 4,000 clients and generate about 12,000 invoices a month.

Because the firm was using paper-based processes to review proformas, preparing invoices each month was time-consuming and labor-intensive for all involved. Many of the firm's attorneys expressed interest in digitizing processes to streamline the task. Several years ago, the firm had tried to implement a paperless billing solution, but the project was dropped. There were some aspects of the software the firm didn't like. However, the need for a digital billing system still existed. Therefore, when Jacqueline Bosma joined the firm as the controller in 2016, she made it her mission to find an adequate solution.

"My background is as an accounting auditor; I'm wired to want to improve processes. My goal coming here was to evaluate our control structure and make our processes more efficient," Bosma says. "The way to do that today is through technology. You're not going to make paper any better; you have to find a better way that replaces it."

**Wilson Allen had
provided Elite
Enterprise and Design
Gallery software
consulting services
to the firm, so it was
a proven and known
technology partner.**



Choosing Wilson Proforma Tracker

The firm had considered several options but was not overly impressed. Not enough peers were using the other solutions, and they didn't have the functionality the firm wanted. Then John Brefach, COO at McCarter & English suggested the team consider Wilson Proforma Tracker software. Wilson Allen had provided Elite Enterprise and Design Gallery software consulting services to the firm, so it was a proven and known technology partner. Bosma and her team began looking at Wilson Proforma Tracker as early as 2017. However, due to other priorities, digital billing was sidelined.

Fast forward to 2019, and not only were attorneys and the finance team clamoring for a better way to collaborate on proformas, but the firm's CIO was also in favor of prioritizing the digital transformation of finance. "We have to keep our competitive edge," Bosma explains. "If you have a big client that has a couple of law firms working for them



“We like the software. It has a nice look to it, and most of the partners felt that it’s super easy to use”

Jacqueline Bosma, Controller, McCarter & English

and three are submitting invoices on the 10th, it’s not a good look if yours don’t show up until the 30th.”

Bosma and the firm’s revenue managers and billing specialists evaluated Wilson Proforma Tracker – and gave it the green light. “The software looked user-friendly, and we felt comfortable that it would work for us,” Bosma says. “Plus, the team at Wilson Allen assured us that we’d be able to accomplish with Wilson Proforma Tracker what had made our other paperless project fail.”

Proceeding with caution

McCarter & English was cautious about becoming too invested in another solution until it was satisfied that it worked as promised. The firm chose to pursue a limited scope, fixed-fee installation as a working proof of concept. Once it was pleased with the software, it would initiate a more extensive solution design and rollout. “Customizations can get out of hand fast, so that seemed to be a good way to be fiscally conservative while fully evaluating the software,” Bosma explains.

The project began as a pilot for two partners, which enabled the billing team to test the system and validate that its integration with the firm’s Elite Enterprise system worked as expected. It matched up paper-based proformas for the two partners with information entered into the software, to see what edits were

going through before any partners started using the software. Once the two attorneys began to use the software, the firm had the proof it needed to justify a broader rollout. “We like the software,” Bosma adds. “It has a nice look to it, and most of the partners felt that it’s super easy to use.”

Accelerating the rollout to enable work from home

The firm added five more users, and all was going smoothly. “After we’d sent our attorneys their proformas, I worked directly with each person to help them get started, and then they ran with it,” Bosma says. “That approach is feasible when you do a small pilot because you can teach each person in about 15 minutes.”

At this point, it was early March 2020 when most people had to start working from home due to the COVID-19 pandemic. That changed priorities in a hurry. “We only had seven people working in the system, but they were working in it successfully. We had to decide. Do we do our best with paper or try to get as many people on Proforma Tracker as possible?” Bosma postulated.

The answer was clear – put the rollout in high gear.

“Wilson Allen did a great job with the initial consultation, was flexible in meeting our needs, and was very responsive in troubleshooting after go-live.”

Jacqueline Bosma, Controller, McCarter & English

Ramping up from seven to 130 users in two weeks

Bosma and Wilson Allen put together a comprehensive plan to move close to 130 partners on Wilson Proforma Tracker. In the middle of March, Bosma sent out an email to the whole firm to explain the remote billing plan to use Wilson Proforma Tracker. She identified who would be trained to use the software and unless there was a major objection, got started with those people.

The revenue manager handled training the firm's 12 billing specialists with screen-sharing and hands-on sessions. She added onto the quick reference guide Wilson Allen provided to create a step-by-step user guide. “It was a manageable process even though some of our specialists had been doing paper-based billing for as long as 30 years,” Bosma says. Meanwhile, Bosma concentrated on training the partners. She waited until their proformas were ready to review to make the training concepts more tangible.

The finance team issued proformas on a Thursday and a billing specialist checked that they were entered in Wilson Proforma Tracker accurately. “We then emailed each partner with a link and user guide and offered options for training sessions,” Bosma says. “They had everything they needed to get started, and a lot of them dove right in. Many skipped the training because it was that easy to use.”



**Within two weeks 130 users
were onboarded and trained.
It was an ambitious plan –
but it worked.**

Streamlining the work-to-bill life cycle

Within two weeks 130 users were onboarded and trained. It was an ambitious plan – but it worked. “We were lucky in that we were already in the pilot phase when the need to work remotely occurred – and the response has been very positive,” Bosma says. “We had to deal with a learning curve and getting comfortable with new processes, but we were able to go from 7 users to 130 in time for our April proformas.”

Bosma focused next on onboarding the remaining 85 billing attorneys. For partners with exceptionally large books of business or those that prefer not to use the software, rather than sending edits to billing specialists, the partners' secretaries enter them into Wilson Proforma Tracker. By the end of April the firm was able to achieve 100% compliance with all of the billing attorneys processing proformas through the software, either directly or with administrative support.

Bosma attributes a lot of the success of this rollout to Wilson Allen's implementation team. “Wilson Allen did a great job with the initial consultation, was flexible in meeting our needs, and was very responsive in troubleshooting after go-live,” Bosma says. “That was really key to our success.”

Realizing the benefits of digital transformation

By switching to digital billing processes, only two people had to physically go into the McCarter & English office to print and ship proformas in April. This not only allowed the firm to keep its staff safer, it also cut down on the amount of paper it used and reduced its shipping costs.

The firm's attorneys turned their April proformas around very quickly. “We give them ten days to review proformas, and about 90% had gotten them back to us within five days. It was remarkable – almost too fast,” Bosma says. “Some of our billers are managing between 20 and 40 partners. To then go in and apply the changes to prepare the invoices while making manual changes for the remaining partners that were still using paper slowed things down in our billing queue. Now that everyone is using Wilson Proforma Tracker, we hope to cut that time significantly.”

Bosma's goal is to complete all of the firm's bills a week before the end of the month and then reduce the turnaround time further. "I would love to get to a point where we can clear everything that's in the billing queue within one day, and then send bills the same day or within a few days," she adds.

Gaining visibility and increasing efficiency

Wilson Proforma Tracker provides visibility throughout the proforma preparation process, which is a feature Bosma finds really compelling as a management tool. "I can see which proformas get returned and when, and which are sitting. With paper, I have no visibility into the process to make it better," she says.

Since billing specialists won't have to track proformas manually, they can focus on more value-added work – like dealing with e-billing issues, client demands, accruals, schedules, and questions – which is also a big plus to Bosma. "My billing team is great.

They're awesome," she says. "I want them to spend their time supporting our partners and clients, not working as typists making edits to proformas. So that's the goal we're working towards."

Staying current and competitive

In addition to implementing Wilson Proforma Tracker, the firm has undergone many projects to make the firm run more efficiently across several areas of operations. "Our lawyers are using more technology in the practice of law to meet client expectations. Our backend processes should be just as innovative. So, we're doing these projects to increase our value to clients," Bosma explains.

In the future, the firm is planning to migrate from Elite Enterprise to 3E. When it does – its Wilson Proforma Tracker software, which natively integrates with 3E, will make the transition too.

"Our lawyers are using more technology in the practice of law to meet client expectations. Our back-end processes should be just as innovative. So, we're doing these projects to increase our value to clients."

Jacqueline Bosma, Controller, McCarter & English

About Wilson Allen

Wilson Allen offers a unique range of software and services that enable law firms and professional services organizations run their business better. We leverage relationships with prominent industry partners and apply deep subject-matter expertise to help firms build stronger relationships, work more efficiently, and run more profitably.

Together we break down the silos across software, data, and processes at each stage of the client life cycle to enable a more strategic approach to operations and better business performance.

- Long recognized as a leader in time and billing applications, Wilson Allen has dramatically expanded its breadth of offerings in recent years.
- Our world-class CRM consultants help firms optimize data and processes to identify, win, and keep high-value clients.
- Proven professional and technical services teams develop and implement software solutions to help firms stay competitive, relevant, and profitable.
- Innovative business and analytics experts help firms access, analyze, and share data to drive smarter business decisions.



Learn more:
wilsonallen.com/proforma-tracker