

INDUSTRY ANALYSIS

Listen and level up

Leverage practice management system-independent apps to deliver the best in client service, says Derek Schutz, product manager at Aderant

If we are being honest, most people do not really want feedback. They prefer praise and recognition of a job well done, and any criticism puts them on the defensive. We could invoke an inspiring quote here from a great leader about receiving feedback, but instead we feel compelled to pose a question – do you have a fixed mindset or a growth mindset?

A person with a fixed mindset dislikes service level agreements (SLAs) or outside counsel guidelines (OCGs). Whereas a person with a growth mindset not only embraces them, but also welcomes the opportunity to service their clients and communicate about expectations.

Client listening is another way of being open to client feedback, and for years clients have been providing this feedback in the form of SLAs/OCGs. Similar to customer service, client listening is not an end product. It's a mindset and an attitude. Instead of fighting and complaining about SLAs, firms should embrace them. This will make for happier clients, which increases the odds of winning more clients, which translates into increased revenue.

So, how does a firm begin to comply with SLAs? Start with your technology stack and think beyond your main practice management system (PMS). SLAs are prevalent throughout a typical billing cycle, both upstream and downstream. Your PMS

may natively incorporate SLAs, but if it does not, you have to think of your entire technology stack as an interdependent ecosystem to get beyond your current status-quo rut.

Luckily, there are many options for law firms, regardless of the main PMS they're using. We refer to them as 'PMS-independent' or 'PMS-agnostic' products, which means they are compatible, and seamlessly integrate, with every major PMS on the market. Choosing best-in-class options for these different functionalities does not have to negatively affect the relationship with your PMS vendor. In fact, these vendors should encourage you to get the most out of your technology, regardless of who makes it. At the end of the day, these products can have a tremendously positive impact on the day-to-day lives of the lawyers, partners and other employees at your firm. They also help to alleviate the stress of compliance with SLAs, so it is a win-win-win scenario.

Compliance upstream

So, with that said, where should you start? The easy answer is that compliance with SLAs should start at the beginning – the point of time entry. If time entry is delayed, non-compliant or inaccurate, it's the first in a line of dominoes that will quickly veer off track down the line. Taking steps to improve the process from the outset can eliminate a host of problems before they begin.



Imagine being able to capture your time as it is being worked, with either the push of a button on your smartphone, or even through voice command. All the research from the past 100 years says the same thing: improved timekeeping increases revenue – and that’s why iTimekeep is the most downloaded time-entry app in the legal industry. It can be used securely on either desktop or mobile device to allow for contemporaneous time entry, no matter where you are.

A small investment in iTimekeep can translate into immediate return on investment, with accurate time entry, shorter billing cycles, fewer billing errors and quicker payments.

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Moreover, iTimekeep's companion, OCG Live, takes timekeeping to the next level. OCG Live is equipped to house each client's unique SLAs right inside the software, to alert a lawyer when his or

her time entry is non-compliant. If the lawyer is notified of a non-compliant entry, they can correct it then and there.

This commitment to compliant time entry makes for happier clients. After all, the perception that clients are just trying to pay less for the services you provide is a myth. Clients are just asking you to provide accurate accounting of what is being done and what they are being billed for. So, iTimekeep with OCG Live can be a game-changer in your firm as it relates to the relationships with your clients.

Transparency and collaboration midstream

As work with various clients and matters takes place throughout the month, clients have also been demanding transparency into things such as budgets, and year- or month-to-date spend against retainer. They have asked for more efficient methods to share confidential documents, such as discovery and contracts. They want to know they

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have a way to review and share information easily and securely, and the best way to facilitate these requests is by providing a secure collaboration portal they can access at any time.

This technology has existed for a while, but until now it was only cost-effective for the largest or most sophisticated clients. Aderant Drive, a PMS-agnostic solution changes that. Not only are these client collaboration portals secure, they are scalable and easily replicated so you can provide this service to every client.

A client that wants to know the status of a filing, or to see the latest version of a brief, or to know when paperwork has been signed, should not have to wait until the next meeting to know. Nor should they have to make a phone call or wait for an email to be answered. Aderant Drive lets a client know the status as soon as it is ready.

Compliance downstream

You will never have clean bills in the end-of-month billing cycle unless improvements are made upstream. So, if you have solved the upstream compliance issues, the billing process will be a breeze, right? Not quite.

For the shrinking number of clients that are still accepting paper bills, yes, the process should be much easier. But as clients move increasingly towards e-billing, you have a new set of compliance issues, with each client spend-management platform having different rules and quirks, not to mention the multiple logins needed to see the status of payment.

BillBlast aggregates all data from the multiple client spend-management platforms, and puts it into one convenient dashboard. This not only shows the status of payments, it also alerts the billing team when an e-bill is non-compliant, along with the reason for that. Often, unless they happen to be in that particular platform, looking at that particular e-bill, a billing team might not even know that an e-bill is non-compliant or late. BillBlast eliminates the guesswork.

Perhaps most important, however, are the

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analytics provided by the BillBlast platform, which can show trends and historical data about the clients, spend-management platforms, and indeed the lawyers who have a greater tendency to see late payments, or write-downs/write-offs. BillBlast provides actionable data to address, and correct, situations in future.

Client relationships

We appreciate that SLAs can be painful, and are becoming increasingly complex, but that is not changing anytime soon. As such, our recommendation is to embrace them as an opportunity to listen to your clients, and so to strengthen your relationships. Client listening is a way of building trust and responding to client needs, and it will cement your place as a valuable partner, rather than simply a vendor.

Providing best-in-class solutions to address pain points within your firm is a small, but important, investment that will pay off in both the near term and the more distant future. It will not only improve the firm internally, but also show your clients you are listening to them. Aderant's PMS-independent solutions are focused on increasing revenue through enabling compliance, transparency and collaboration between law firms and their clients. ▀