8 WAYS TO VET YOUR E-BILLING SYSTEM FOR LAW FIRM ADOPTION

INTRODUCTION

In-house counsel turn to e-Billing and legal spend management solutions to collect and process the legal spend data that is needed to manage the work being done by their outside counsel. Legal teams are seeking modern e-Billing solutions that are flexible and easy to adopt over complex, clunky ones. However, what is often not considered is how a legal department's vendors and law firms will interface with the software, ultimately ensuring the legal team gets the most out of it.

It is important to note that if only a portion of law firms are submitting invoices into an e-Billing system, legal teams end up with missing data from invoices that come in separately (often via email), leaving them with inaccurate reports and an inefficient process for invoice review. Even if an in-house admin or paralegal is manually entering these invoice amounts, the legal department will miss out on critical line item details of the invoice, creating additional gaps to the data set. For this reason, the goal for any legal department or legal operations team should be nothing less than 100% law firm adoption of their e-Billing system.

ABOUT THIS GUIDE

We've compiled eight areas to evaluate your e-Billing solution to ensure law firm adoption and the most efficient experience for each firm you work with. The evaluation criteria reflects how your law firms will interface with your current (or potential) e-Billing solution, as well as your invoice submission process. The e-Billing solution that will provide the highest value and ROI is not only easy-to-use and adopt by the legal department, but for their law firms as well.

1. USABILITY

e-Billing solutions often have an accompanying vendor portal which law firms will use to submit invoices to that particular client. The vendor portal sends invoices to the e-Billing platform for the legal team to review and approve invoices, track status, access critical spend reports and legal metrics extracted from your invoices, and more. When evaluating e-Billing solutions, it's important to see how intuitive the vendor portal is so you can be confident invoices get entered correctly into your e-Billing system.

As much as you may want to think so, you aren't the only client your law firm is servicing. This means that their staff, especially their billing administrators, must learn and manage dozens of different systems and processes for submitting invoices.

Introducing an e-Billing solution that's difficult to use makes their lives harder and limits product adoption, not to mention potentially putting a strain on the strategic partnership you are trying to build with them. No one wants to spend their day in a clunky, outdated system or rifle through technical documents just to figure out how to submit an invoice at the end of the month. An easy to use system doesn't only apply to your in-house team.

Evaluate the usability of an e-Billing solution from a law firm perspective by asking:

- ✓ Do law firms need a lot of training to use the system?
- ✓ Is it easy for a law firm to sign up for an account?
- ✓ Do you help onboard and offer training to law firms?
- ✓ Are activities like adding a client or submitting an invoice intuitive?

2. VENDOR PORTAL DEMONSTRATION

You'll definitely discuss the usability of the vendor portal with potential e-Billing provider, but don't be afraid to go a step further and actually ***look*** at the solution your law firms will be using. By conducting your own evaluation to determine how intuitive the solution really is, you set your law firms up for success. Alternatively, you can have one of your trusted law firms see a demo of the platform. This gives them the opportunity to ask the provider questions, ensuring they are comfortable with the platform's functionality and features.

3. INVOICE SUBMISSION

One of the primary benefits of an e-Billing system is to streamline how invoices are passed from your law firms to your legal department. It's an essential tool if your legal team receives dozens of invoices a month, something especially common for organizations that do a lot of patent work.

What if your vendor portal only allowed your law firms to load one invoice at a time? Unfortunately (and surprisingly), this is how some vendor portals are set up; it's counterproductive and can add hours to your law firm's day. If it is painful enough, you might even end up with those invoices as email attachments for you to deal with, which causes extra work for your team.

Don't subject your firms to a frustrating, manual invoice submission process by asking:

- ✓ Can the vendor portal handle mass uploads?
- ✓ Do invoice uploads have an automatic pdf attachment?
- ✓ Does the vendor portal support LEDES and pdf format?

To reach the **goal of 100% law firm adoption of your e-Billing solution,** look for a system that can accept submitted invoices from multiple law firm billing portals. This helps ensure that each vendor you work with is able to submit invoices electronically, providing you with valuable spend data for analysis.

WHAT IS LEDES FORMAT AND WHY IS IT IMPORTANT?

The Legal Electronic Data Exchange Standard, LEDES, provides a consistent framework for legal billing data which helps reduce errors and improve efficiency. LEDES was created to provide law firms, that manage a number of proprietary systems, with a consistent way to communicate billing data to its clients.

While using LEDES invoice files is strongly encouraged to streamline the processing of invoices from submission to approval and payment, smaller and boutique law firms aren't always able to generate invoices in LEDES format. If you work with these types of law firms and would like to maintain this relationship after adopting an e-Billing system, finding a solution that effectively supports invoices in pdf format will be essential to ensure you capture all possible spend data.

4. INSIGHT INTO PAYMENT STATUS

As legal departments become more data-driven and look for total transparency into their legal spend, law firms have struggled to keep pace. Traditional time and billing systems used by law firms don't often provide the full picture. There's no record of billing method, when it was delivered to the client, and most importantly for law firms, there's no visibility into payment status.

Eliminate the time you and your team spend answering calls and emails from outside counsel about whether an invoice was received, submitted for payment, or been paid by asking:

- ✓ How does e-Billing track invoices from submission to payment?
- ✓ What happens when legal needs additional information to process an invoice?
- ✓ Will law firms be notified if an invoice is rejected and / or paid?

5. COST OF SERVICE

A handful of e-Billing vendors charge law firms a toll to submit invoices to their client. These vendor charges often increase legal bills because law firms pass the costs back to the client. You're now paying for e-Billing technology, and an additional charge for each invoice that gets submitted. If you receive hundreds of invoices a month, these costs can add up quickly.

Make sure you have a transparent view of what you're paying for by asking:

- ✓ Is there a cost for law firms to submit invoices?
- ✓ What are the monthly subscription fees?
- ✓ When might monthly subscription fees increase?

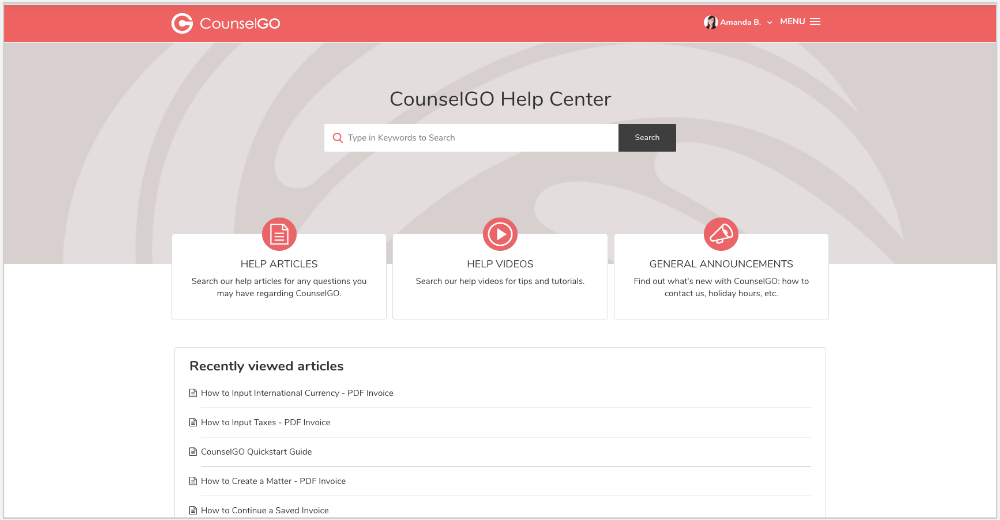
6. DEDICATED LAW FIRM SUPPORT

Ongoing support and troubleshooting is a requirement for any technology. Some e-Billing providers only offer support for your legal department, leaving your law firms out in the cold. If law firms have questions (not uncommon with new technology), they may come to you for help. It is important to think about all stakeholders involved. If your legal team consistently needs to step in to troubleshoot issues with invoice submission, they aren't getting to the high value tasks that matter most.

Understand what support options are provided to your law firms by asking:

- ✓ Do you provide support to law firms that submit invoices to us?
- ✓ Is there an additional cost for dedicated support for our law firms?
- ✓ Is there support coverage for law firms in other time zones?
- ✓ Is there documentation law firms can reference when they have questions?

SIMPLELEGAL'S VENDOR PORTAL (COUNSELGO) OFFERS SUPPORT AND A SELF SERVICE HELP CENTER



Talk with your e-Billing vendor and ask to see what type of resources are available to support your law firms.

SimpleLegal has a dedicated help center for law firm support, providing commonly asked questions and answers, as well as a way to easily search for specific pieces of documentation related to CounselGO.

7. FEEDBACK

The ability to take customer feedback and implement it back into the tool indicates that you're working with an organization dedicated to innovation and your continued satisfaction with the product. When this type of engagement extends to your law firms, you increase their rate of satisfaction and product adoption.

A few things to ask your e-Billing provider on the topic of product feedback include:

- ✓ What feedback have you gotten from your users?
- ✓ Are there examples of functionality that's been added as the result of a law firm request?
- ✓ What kind of relationship do you have with law firms that use your system?

8. LAW FIRM REFERENCES

When it comes to technology purchases, there is no denying that word of mouth and first-hand experiences from industry colleagues will always carry the largest weight. During your evaluation process, it's important to get feedback from your peers through the form of customer references. Shouldn't your law firms do the same? If you know other legal departments and their law firms are happy with the software, you'll likely share the same positive experience.

Find out if your law firms are already using the system for other clients, and find out what they think. Encourage your top law firms to ask their peers about their experience with the vendor portal or e-Billing system from the law firm side. Or, ask that the e-Billing provider set up time for them to chat.

96% of top law firms already submit invoices via SimpleLegal through CounselGO

Ask your e-Billing provider these questions, and see how their responses stack up against peer reviews:

- ✓ How many law firms use your system?
- ✓ How do users rate your vendor portal over others?
- ✓ What features make your law firms' lives easier?

THE POWER OF POSITIVE EXPERIENCES & PEER REVIEWS

A 2016 ILTA/InsideLegal Technology Purchasing Survey found that 62% of respondents indicated referrals from peers and other law firms as the top purchasing influence [for new technology]."

"I bill electronically on over a dozen different platforms and CounselGO has to be one of the most user-friendly ones I've ever worked on."

– Debra Duddy
Billing Coordinator for Zetlin & De Chiara

CONCLUSION

Law firm adoption of your e-Billing system is fundamental in allowing your in-house team to emerge as a more quantitative and data-driven department. See how your current solution stacks up against these requirements and determine whether your technology of choice is hindering your relationship with your outside vendors. Or, when evaluating a new solution, remember to discuss these eight criteria with any e-Billing provider to ensure your in-house legal department ***and your law firms*** are set up for success.

ABOUT SIMPLELEGAL

SimpleLegal is an e-Billing, legal spend, and matter management platform that helps in-house departments and legal operations better track, manage, and report on their legal spend.

Our free vendor portal, CounselGO, is used by 96% of the top law firms in the country and is recognized for its modern and intuitive interface. We provided dedicated law firm support so you don't have to spend time answering phone calls and emails with questions from your law firms.

To learn more about SimpleLegal, visit us at www.simplelegal.com or schedule a demo.