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Davis Schilken, PC Automates Billing and Gets Paid Faster with Legal Application Consulting from Legal Workspace

Davis Schilken, PC, used to face a time-consuming and complicated billing process at the beginning of each month. Diane Kuhre, firm finance manager for Davis Schilken, PC, explains how the six step billing process **used to work** prior to Legal Workspace:

1. Attorneys and staff would input their time into LexisNexis Time Matters®.
2. Kuhre would then export that time into Excel, sort it by attorneys and staff and hand out the spreadsheets to timekeepers.
3. The timekeepers would go through the list, make changes and return it to Kuhre.
4. Kuhre would then update the accounts in TimeMatters®.
5. An integration would pull the information from Time Matters® to QuickBooks®.
6. Kuhre would then to go into QuickBooks® to each client's account, add attorneys' initials and print each invoice for mailing.

The process would take four days, which often included late nights and weekend work. Additionally, Kuhre allocated extra time each week for a manual review of entries.

"I spent a couple of hours a week checking each timekeeper entry for coding errors, spelling errors, co-counsel splits and shorthand," shares Kuhre.

A contributing factor to this complicated process stemmed from the firm's billing structure.

"We're a complex firm when it comes to billing," says Kuhre. "We do the standard hourly, 50/50 and monthly billing. But we also bill according to milestones and handle trust accounts as well."

The process offered room for improvement. The firm turned to specialized legal application consulting to introduce a streamlined and automated process that cut the time spent on the entire billing process in half.

The Billing Wish List

Davis Schilken had a specific wish list for billing. Not only should it transform into a quicker process, but it should be simpler, entail less manual data entry and eliminate duplications. It should also split billings between timekeepers as needed and accommodate reporting requirements.

Most importantly, the new billing system had to solve their challenges with account balance transparency.

"I was the only one that could see trust fund account balances," comments Kuhre. "Attorneys and other timekeepers would have to call me several times every day to get balances. Plus, if a client hadn't paid, I was the only one that could see that."

Creating a New Billing Standard with Legal Workspace

The firm turned to leaders in legal applications knowledge from Legal Workspace for help. The company offered certified consulting experts with more than 20 years of experience in legal applications. After a thorough evaluation, both process consulting and technology were leveraged to tame the billing challenge. Billing Matters® was brought in and integrated with the existing applications including Time Matters® and QuickBooks®. The syncing was also refined between systems.

A Streamlined and Automated Billing Experience

As a result of refining and enhancing the billing process, Davis Schliken expedited the billing process significantly and enjoys an elevated level of efficiency and transparency.

"Since I can complete monthly billing in half the time, invoices get out the door in two days. The firm gets paid much more quickly now," explains Kuhre.

Overtime and redundant manual labor have both been eliminated.

"I no longer have to work late or over the weekend to complete billing, which is another area of savings for the firm," comments Kuhre. "I don't have to export data to Excel or double check entries and there are templates available for all of our billing types."

Attorneys appreciate the enhanced billing process too.

"The system takes the timekeeper entries and creates prebills for the attorneys to review. After the attorneys approve them, I push a button, print them out and mail them. It's all automated now," says Kuhre.

The enhanced billing process also adds an elevated level of transparency for attorneys.

"Attorneys can now view the amounts in trust accounts through Time Matters®. This allows us to give them the information they need without granting them access to QuickBooks®. They love it and I no longer get ten calls a day asking for balances. Plus, trust account balances are included automatically on each invoice," shares Kuhre.

Overall, the firm is pleased with the new billing process and technology recommended and configured by the Legal Workspace team.

“Billing is much less stressful now,” says Kuhre. “They system is very user-friendly. Sometimes I have to ask myself if I’m doing it right because it’s so easy.”