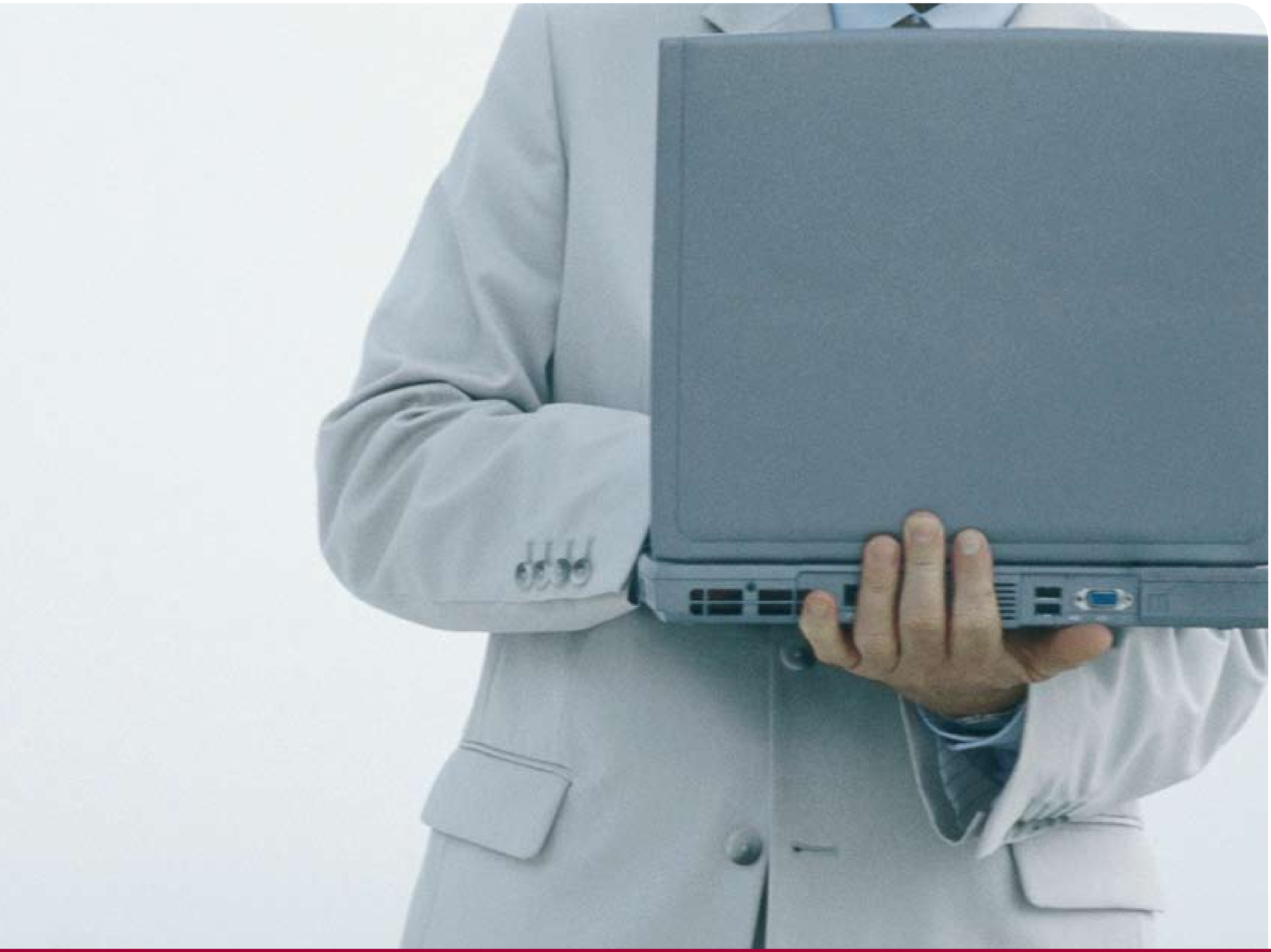
International Legal Technology Association



December 2008

E-Billing
White Paper and Survey Results

A Publication of ILTA

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Legal technology consists of a relatively small network of people applying and innovating tools and strategies to help attorneys make the best use of their time and better serve their clients. But this is lawyers we're talking about, so there are the inevitable confrontations and disagreements, and those tend to trickle down (or up?) to the IT departments.

So what to make of e-billing, which seems to pit corporate law department against law firm accounting department? While the LEDES Oversight Committee (LOC) seems to be working toward a common e-billing system across all nations and currencies, there is still the disagreement as to who should pay for e-billing, which system to use and whether to use one at all.

We're happy to bring you these articles and insights from contributors on the frontlines of e-billing, and we're especially interested in your reactions to the results of the e-billing survey, co-produced by the LOC, ILTA and a few e-billing vendors. We also hope you appreciate that this white paper is being brought to you in digital-only format. Please feel free to save this document to your computer, send an e-mail message with the link to a colleague or print just the pages you want.

Monica Williams, Managing Editor

ABOUT ILTA

Providing technology solutions to law firms and legal departments gets more complex every day. Connecting with your peers to exchange ideas with those who have "been there done that" has never been more valuable. For over three decades, the International Legal Technology Association has led the way in sharing knowledge and experience for those faced with challenges in their firms and legal departments. ILTA members come from firms of all sizes and all areas of practice, all sharing a common need to have access to the latest information about products and support services that impact the legal profession.

STATEMENT OF PURPOSE

ILTA is the premier peer networking organization, providing information to members to maximize the value of technology in support of the legal profession.

International Legal Technology Association

Compliant Legal E-Billing: A Global Perspective

by ROGER JARMAN, CT TYMETRIX

With national borders no longer barriers to trade, the globalization of business has reached maturity. Companies can now contract suppliers from nearly any part of the world, while the number of markets to sell to has increased exponentially.

Financially, this change has been a boon to business. A greater selection of suppliers means companies can shop around to reduce manufacturing and labor costs. New business channels have enabled companies to sell higher volumes of products, dramatically increasing their revenue. However, what has been a blessing to the bottom line has created new burdens for inhouse legal departments. Entering new markets means foreign regulations, which legal departments must thoroughly grasp in order for their companies to avoid noncompliance penalties. In addition, foreign markets can entail unfamiliar business practices and policies. For example, in some markets, such as China, the government plays a larger role in commerce. Establishing a facility in China requires skillful bureaucratic maneuvering and a greater understanding of the government than it would to establish a presence in other countries. Even litigation in foreign jurisdictions can be a nuanced practice, with different jurisdictions having unique procedural rules.

Oftentimes, in order to ensure compliance with foreign regulations, help conduct business, and provide knowledgeable services in the course of litigation, inhouse counsel will contract local outside counsel. However, this, too, presents additional problems, which affect legal departments and law firms alike. Most notably, billing requires legal professionals to learn and comply with foreign tax laws, which presents a challenge since each jurisdiction levies different taxes on different services. For example, Canada taxes various professional services differently, a practice not seen in some jurisdictions, such as the United States. In addition, each Canadian province has its own tax scheme, which is separate from the federal tax. If complying with Canadian tax regulations alone is challenging, then complying with multijurisdictional tax laws is even more difficult.

Finding the Right Tool

Because of this, legal departments and law firms need to equip themselves with the tools that will help them comply with various jurisdictional and local tax laws, as well as enable them to conduct business as efficiently as possible. This explains why legal electronic billing software is quickly eclipsing paper billing throughout the world as the invoicing standard. In the U.S., law firms have been using e-billing for more than a decade; however, international adoption has been much slower, finally coming into regular practice over the last three years. This is due primarily to three factors. First, in the U.S., legal expenses represent the largest part of the corporate budget, while internationally, there is significantly less expense in this area. Second, we saw a huge uptick in legal e-billing thanks to the fall of Enron and the passage of the Sarbanes-Oxley Act, which increased government scrutiny of corporate accounting practices. Finally, in the current economic climate, U.S. companies are challenging their legal departments to practice better cost management, pushing e-billing more to the forefront in the U.S. than elsewhere.

With the rise of globalization, the Fortune 10 and the Global 100 are becoming interested in managing their total legal expenditures, which involves a consolidated view across a globally dispersed organization. To do this, there must be an international standard for electronic invoices that accommodates the nuances in tax law throughout various jurisdictions. Additionally, an international standard would allow these organizations and others to better track their costs through the use of technology.

In the United Kingdom, firms are quickly realizing the benefits of e-billing systems. These include a more consistent and automated invoice review and payment process, simple invoice submission procedures and various collaborative tools that can be used by both law firms and corporate clients. However, not all legal e-billing systems are created equal. When operating in the U.K., firms must ensure that their e-billing system is compliant with two standards. The first set of standards is set by Her Majesty's Revenue and Customs (HMRC), and include specific value-added Tax (VAT) regulations that all electronic invoices must meet within the U.K. As for the invoice file standard itself, the U.K. has followed the U.S. in adoption of the Legal Electronic Data Exchange Standard (LEDES). LEDES is a set of legal e-billing standards developed by the LEDES Oversight Committee (LOC), a nonprofit established by legal professionals. Firms operating or doing business within the U.K. must ensure that their legal e-billing systems comply with both sets of standards.

LEDES History and Future

LEDES was born out of a meeting that took place in 1995 between Price Waterhouse, LLP, and a consortium of legal industry vendors that offer time and billing and case management systems. The accounting firm convened some of the top vendors in the marketplace in order to define a standard electronic billing format for use by the legal industry within the U.S. At the time, legal e-billing was just beginning to gain momentum within the U.S. market, and was still relatively unused internationally, leading to the creation of a strictly domestic set of standards, with an end goal of open standards that would not cater to any one organization or group. At the time, this group developed two e-billing formats. The first proved to be too complex and was abandoned by the legal industry. The second, however, planted the seed for what would become the first official LEDES format.

In addition to complying with LEDES, legal e-billing systems must also be compliant with jurisdictional regulations, which, even throughout the European Union, vary from member state to member state. The LOC is fully committed to moving electronic billing forward and, as such, has been working to update the current XML format to include additional enhancements to fully support the global rollout of electronically generated tax- and eInvoicing-compliant invoices in the legal profession. To this end, the LOC enhanced the XML 2.0 format, released as XML 2.1in 2008. When it comes to an international legal e-billing standard file format, XML is a more robust and extensible format. It is assumed that the 1998B-International format, developed as a joint effort by the LOC and LITIG, a UK-based organization, to promote the growth of e-billing in Europe, but which has fewer placeholders for information and is not extensible, will likely become obsolete as the more robust XML e-billing formats become available in law firm time and billing systems.

The LEDES XML 2.0 and 2.1 formats provide the extensibility that the flat file does not and are considered the basis for global e-billing. Using an XML editor, with a simple click of a button line items can be expanded, showing the related information, such as taxes, applicable to the item. This can easily display the tax type, the applicable tax rate for the tax type, as well as the jurisdiction to which the tax type is associated. It also has placeholders for information required by statute or regulation, and provides a section where additional information required on an invoice by law can be provided without requiring the format to be updated by the LOC.

Legal professionals are beginning to rely more heavily on electronic invoicing systems. It is crucial that corporate legal departments ensure their systems are compliant with the two prevailing standards that dictate legal e-billing in the U.K.: the international LEDES standards as well as the domestic HMRC regulations.

From Art to Science

Electronic Billing for Law Firms

by NIAMH EADIE, PROFESSIONAL PLUS SOLUTIONS

Given the time and effort to create it, it would seem that a traditional paper bill is nothing short of amazing. After all, each bill is carefully crafted, the entire process requiring the input of many attorney and support staff members. Information — often collected from several offices, with all of the jurisdictional implications such an exercise entails — must be collected and appropriately entered, including time and cost information, the terms of engagement and client-specific billing guidelines. Considering this, what is the finished product but a work of art?

Alas, if only this were true. For no sooner has this masterpiece been dispatched to the client than the entire process begins again.

If a bill is less than a work of art, but more than an invoice, what is it? It is an opportunity for law firms to communicate with clients. A final bill, after all, could be the last correspondence a client receives from the firm on a particular project.

Shouldn't such an important document benefit from a little modernization? It could work like this: At the push of a button, billing information from the law firm arrives, is checked and (hopefully) approved for payment in the client's accounts payable system.

This is the reality of electronic billing, but for many law firms and corporations, electronic billing remains science fiction. However, an increasing number of law firms and corporate clients achieve e-billing nirvana and all the benefits it brings. Indeed, if your firm has large or mid-sized corporate clients, chances are they have already mentioned electronic billing. If not, they are soon likely to, since it is estimated that upwards of 25 percent of corporations with major relationships with law firms will be using e-billing by 2010.

Ask any law firm why it is billing electronically and you are likely to get the same answer: Because a client asked us to. Law firms tend to see it as a necessary evil. Interestingly, the reverse is true across the clients they bill in general. Any research undertaken to ascertain the benefits of electronic billing will almost certainly attribute those benefits to the requestor of the e-bill, with the recipient of the request needing to be convinced of the benefits.

Why Law Firms Resist Electronic Billing

If the benefits are clear, we must ask why law firms are out of step with the rest of industry, and what can be done to get your law firm billing electronically and taking advantage of the benefits?

Law firms resist electronic billing largely because the processes within a law firm are designed to support billing as the point where most of the decisions regarding what should or should not be billed are made. Most of these decisions require human input, quite often by senior, personnel. Billing electronically, on the other hand, would require a number of those decisions to be taken and electronically captured by the time and billing system; or in the case where work is already underway, these decisions would need to be superimposed onto the current information held for the client and matter. Because the billing process is so labor-intensive, it does not easily translate to the more automated electronic billing model.

Law firms perceive that most of the benefits gained from e-billing go to their clients. Of course, it is true that law firm clients who enforce e-billing stand to benefit in many ways. Corporate clients use e-billing as a way of controlling legal costs. Additionally, an electronic bill is very transparent, with much more detail required on time narratives, andtime entries very structured through use of the Uniform Task-Based Management System (UTBMS) codes. Naturally, this level of detail can be analyzed to ensure that the billing rules laid down by the client are being adhered to.

However, there are also many benefits to law firms from billing electronically. The most obvious and widely touted benefit is that the authorization and payment process should be faster. However, sometimes in the early stages of implementing an e-billing process, law firms find that many of their bills are being rejected; these issues get ironed out fairly early on. Once e-billing is up and running, firms have found prompt approval and payment to be a tangible benefit, with days-to-pay well below 30 days, and, in some cases, as little as 72 hours.

Having to record more accurate and detailed time entries has benefits for the law firm as well as the client. By introducing better working practices — including contemporaneous, accurate and detailed time recording — a law firm can capture more billable time and use the information they are capturing to provide better and richer management information, which law firm management has been trying to capture for decades. In addition, the capture of more time has a direct financial benefit, while better quality management information could indirectly lead to financial gains for the law firm.

Electronic billing also forces law firms to restructure the billing process to one where the parameters are set up once at inception, rather than applied every time a bill is drafted. Of course, while this leads to less manual intervention at the billing stage, the need for human review is always likely to remain.

Another benefit of e-billing is the financial and environmental savings associated with not producing a paper bill. The courier company DHL expects to save 2,400 trees and 600 tons of carbon each year by eliminating a third of its paper invoices in Europe. One U.S. law firm estimates that the hard cost of producing a paper bill, *i.e.* the cost of paper and postage, is $1 per bill. Though a dollar-per-bill does not seem a huge amount of money, multiplied over the number of bills produced annually by a law firm, it can amount to a tidy sum.

The greater transparency in the billing processes delivered to clients by e-billing, while a little scary, must provide the client with the knowledge that they are getting value for their legal expenditures. Working in partnership with your client to achieve this transparency can only enhance the client relationship and ensure client retention into the future. If you're not doing it, you can be sure some other law firm is.

How to Adopt Electronic Billing

Technically, there are no longer huge barriers to electronic billing, and most practice management systems can generate a LEDES format bill. Until recently, all of the e-billing intermediaries had been focused on corporate clients, but we are now beginning to see the emergence of e-billing intermediaries who focus on the issues faced by law firms. All this is good news for law firms.

However, firms should not underestimate the effort required to adopt e-billing. Though it is perfectly understandable that a firm will take a tactical approach to e-billing when approached by one or two clients, once the number of clients and volume of e-bills starts to increase, it is well worth a firm's while to stand back and put in place a strategic approach to electronic billing. By doing this, it will ultimately put the law firm in a position of control, so that as more clients come on board, the law firm will be more able to dictate what the process ought to be.

Many of the issues and challenges facing law firms in their quest to electronically bill are process-and-change management issues. The art of creating a paper bill has many associated working practices that are not conducive to electronic billing, so this cultural change will need to be managed within the firm. The processes surrounding how the firm will capture the client's guidelines in relation to electronic billing need to be defined, tested and put into practice. The correct task and activity codes need to be set up in the system, and more importantly, lawyers need to ensure that these codes are used rigorously as they record their time, along with meaningful narrative descriptions.

Processes need to be put in place to ensure that the client guidelines have been adhered to and reflected within the electronic bill so that the bill will be authorized by the client or its intermediary. It is also important that all tax, statutory and regulatory rules across the jurisdictions are adhered to. While much emphasis has been placed on the processes surrounding time-based bills, there are other types of arrangements which need to be catered for, such as fixed-fee bills, conditional matters, VAT-only bills and bills paid by a third party.

An e-billing project should be collaborative; the law firm needs to work closely with the client and any intermediaries to achieve a win-win situation. Of course, it is important to make the transition to e-billing at a pace that gives everyone plenty of time to perfect the solution. Law firms will often need to engage the assistance of their practice management supplier to help set up client arrangements and output of the necessary files. Law firms need to work with the client to select the e-billing vendor most suited to the needs of both the client and the law firm. You may even wish to investigate the e-billing vendors that are now targeting law firms to see if they can simplify the process.

Finally, it is important to provide staff with training in the new processes so that everyone is informed and understands the implications of what they are being asked to do. Many of these process changes are considered to be best practice whether a client is being electronically billed or not. Firms should take the opportunity to look at billing as a whole, not just billing for the clients that require an electronic bill. Indeed, it is possible to achieve some of the benefits listed above with paper-based billing if these process changes are put into place.

Managing Electronic Billing

A Common Sense Approach Without the Silver Bullets

by RYAN LADISIC, EBILLINGHUB AND ANDREW DAWSON, ADERANT

Ever since electronic billing became a legal-industry trend in the 1990s, corporate law departments have been explaining its advantages and benefits., including less work for their billing departments, an expedited invoice approval process leading to faster payment and greater information transparency.

While all of these benefits are real, the issue remains that they are only a fraction of what their clients and e-billing vendors suggest they should be. The reason? E-billing vendors make those assertions under the assumption that a law firm only has to deal with one corporate e-billing system, that all law firm clients require the exact same data elements in their bills and that they all use the same validation process for information contained in those data elements. In reality, law firms have not gained the same process and informational advantages from electronic billing as their inhouse counterparts, so the idea that law firms will recoup their extra effort and expense when their invoices are paid faster has also not yet come to pass.

For many corporate law departments, much of the value in their e-billing systems is the ability to automatically analyze invoices for compliance with the company's outside counsel guidelines. As a result, a fair percentage of invoices are automatically rejected and returned to the law firm for revision. Again, some e-billing applications handle this better than others. For a firm that creates and sends hundreds or thousands of electronic bills each month, keeping track of these rejections can be a time-consuming and extremely expensive proposition.

One reason rejected invoices can cause so much trouble is a lack of transparency. Most e-billing systems do not include a "dashboard" for tracking the status of invoices, but even if they did, the firm would need multiple dashboards to see the status of each. Instead, firms usually track using spreadsheets, which can typically only be accessed by certain team members. Additionally, information is usually entered manually, creating levels of inaccuracy and causing invoices to be "lost." What's worse, the reasons for invoice rejection are usually hidden away in the system's e-mail messages, imposing a clunky lookup procedure in order to understand why an invoice has been rejected. The resulting lack of transparency has a substantial financial impact on the firm, largely in terms of the speed of collection (and the time-value of this money) and the firm's realization and write-off rates.

In order to better understand the burden of e-billing as it relates to invoice volume, the associated resource drain and the average cost, law firms can look to common statistics that re-emphasize the point (see tables below).

Law Firm E-billing Volume and Associated Resources

Common E-billing Tasks & Measurements	Volume			
Number of electronic bills a law firm sends to their clients per month	10 to 200	201 to 600	601 to 1500	1501 to 7000
Number of corporate clients that require ebills from that firm	Up to 15	15 to 45	45 to 110	110+
Percent of monthly bills law firm sends electronically	3 to 7	7 to 12	12 to 18	18+
Percent of revenue in bills that the law firm sends electronically	10 to 15	15 to 25	25 to 35	35+
Number of unique corporate e-billing vendors a firm typically interfaces with at this level	Up to 3	3 to 12	12 to 21	21+
Full-time equivalent (FTE) resources allocated to those e-bills	.5 to 1	1 to 3	3 to 7	7 to 20+

Average Costs for Firms to Send E-bills to Clients

Monthly e-bills/Revenue contained in those bills	200/ $833K	500/ $3.9M	1000/ $8.9M	2000/ $14M	3500/ $24M
Monthly cost to firm to convert clients from paper bills to e-bills	$350	$1,050	$1,750	$2,800	$4,900
Monthly cost for firm to create, validate, submit & track e-bills	$5,208	$10,729	$28,896	$54,375	$78,125
Monthly cost for a firm to maintain & support their e-bills	$242	$508	$725	$942	$1,318
Monthly cost for training & documentation of e-bill process	$55	$139	$450	$866	$1,238
Monthly costs of e-billing on a firms "diary to cash cycle"	$2,063	$9,694	$22,067	$35,888	$61,256
Monthly costs of e-billing on a firm related to "write offs"	$1,500	$7,050	$16,050	$26,100	$44,542
One year costs for firm to e-bill clients based on number of bills and revenue contained in those bills	**$113K**	**$350K**	**$493K**	**$1.45M**	**$2.3M**

Source: Since 2007, eBillingHub has conducted over 80 internal law firm cost analyses and more than 300 firm interviews to determine e-billing volume and associated costs.

Taking Action into Firm Hands

Based on the above discussion and analysis of e-billing related costs, it is clear that firms should always look for a more optimal way of managing their e-billing requirements. For example, a firm that has created automated procedures (that can, for example, auto-create e-bill text files and drop them into a network folder for the biller) definitely has a higher capacity of e-bills to full-time employees than a firm that has to manually generate the text file. Or consider the firm that has decentralized billing and has no specialized e-billing role; their ratio of e-bills to full-time resources is typically significantly smaller than a firm that has centralized billing and has developed a specialized e-billing role. However, a proven method for reducing the burden, but by no means a silver bullet for solving all e-billing issues, is to introduce automation into the process. Let's take a closer look at various stages of potential automation.

- Bill preparation: Firms can automate the preparation of e-bills, such as which e-billing vendor gets a particular client's e-bill, as well as all the unique rules and issues associated with that client's e-bills. This is similar to the stored procedures cited above.

- Bill tracking: Firms need to centralize status tracking, so they know where each e-bill is, its status and if there are any issues to resolve. By integrating these bits of information, law firm staff can easily respond to a number of important questions that were once difficult and time-consuming (or simply impossible) to answer.

- Bill submission: Firms need to automate how e-bills are sent, ensuring that the unique setup required by each e-bill vendor and client are accounted for before an e-bill is sent.

- Bill management: Firms need to automate the handling of e-bill rejection and resubmission, etc.

- Bill "visibility": Firms need centralized reporting capabilities so they can see where everything stands and if they need to do anything.

For years, corporate law departments have been receiving real value from their electronic billing systems, with the belief that these systems also benefit — or at least do not harm — their law firms. However, each firm is required to use a myriad of different electronic billing systems, often customizing each one. Additionally, the process of uploading invoices takes real time and training, and tracking and resubmitting rejected invoices can cause meaningful delays in the payment cycle. The key for law firms will be to develop systems designed to counteract related costs. Firms can leverage technology and implement good processes to ease invoice upload, avoid costly and time-consuming invoice rejections and provide transparency to the entire electronic billing operation. The right systems can help firms minimize the real cost of electronic billing.

The Key to Efficiently E-bill and Increase Cash Flow

by JAMES HAMMOND, RAINMAKER SOFTWARE

Law firms have the ability to streamline the electronic bill submission process by switching from their current manual, file copy process of uploading bills to clients to a centralized e-billing hub process. A centralized billing system can facilitate efficiency and improve cash flow by fully automating an otherwise tedious process and it can eliminate billing backlogs and verify submission to hundreds of clients or other e-billing intermediaries.

The key for law firms is to develop systems designed to counteract costs. Firms can leverage technology and implement good processes to ease invoice upload, avoid costly and time-consuming invoice rejections and provide simplicity into the entire electronic billing operation. Firms have learned that with automated e-billing, they can actually reduce the number of staff members or distribute more meaningful tasks to those extra law firm staff members who were once spending large amounts of time just on billing issues. E-billing is a tool that simplifies and quickens the invoice upload process and provides law firms with a dashboard with ease to invoice status. It also provides template-driven approaches to preparation of e-bills, integrates with leading time and billing systems, performs a prebill submission and accesses all potential submission errors. An e-billing system offers central visibility into the status of all e-bills, across all clients and there is no additional hardware for firms to purchase.

Making the Transition to E-Billing

In order for the e-billing system to increase cash flow, it should also reduce aged accounts receivable and eliminate duplicate efforts. Electronic billing has been around for more than a decade and yet the use of it in law firms is really just getting started. As an increasing number of legal departments are requiring firms to submit their bills electronically over the Internet, e-billing reduces the cost of paying bills and enables law departments to track and justify outside legal spending more closely. Within 10 years, it is projected that e-billing will be used in 50 percent of corporate law departments, and it is an issue that firms should be taking more seriously.

To make the switch from paper to electronic bills, firms need to make changes to their billing software programs so that the clients business and technical requirements are met. Lawyers must also learn to use the billing codes for specific legal services. Once submitted, e-billing should provide a quick turnaround of payments and allow firms to analyze the payment patterns for each of their e-bill clients. This can help a firm's project cash flow for e-bill payments and see when e-bill payments are delayed past a historic norm for any individual client.

In addition to streamlining the billing process, saving lawyer and administrative time and reducing aged accounts receivables, centralized e-billing can better enforce their outside counsel billing guidelines. Automated e-billing gives firms the opportunity to test submit an e-bill and check for consistency all on-line, in real-time prior to actually submitting. Law departments continually provide updated guidelines to their firms and expect the firms to configure their systems to meet this moving target. For a firm with dozens of different e-billing clients, the management of these updates can be difficult, resulting in rejected e-bills and delayed payments.

Status reporting is sometimes required at firms from outside counsel on particular issues and matters. E-billing gives firm members the ability to establish status reports before invoices are submitted for review. These reports can also be used to generate monthly reminders for outside counsel regarding various deadlines on special occurrences.

Corporate clients use e-billing information to create comprehensive analyses, allowing them to better forecast their internal costs while collaborating with outside council to compare actual verses firm budgeted costs. A centralized system allows firms to both view their budgets online and actually submit budgets for all required matters. Automatic comparisons of invoices to budgets can be created and tracked by law firms and/or internal lawyers. Also, with e-billing, clients have access to information on the cost of services within different departments. This allows them to make better decisions regarding work that should be handled in-house verses sent out for their law firms. E-billing helps profile law firm productivity and takes the ambiguity out of discounted rates that may not actually result in any significant savings. Many law firms suffer from inefficient staffing of matters and not from the actual discounted hourly rates usually associated with the scrutiny of e-billing. E-billing can assist in monitoring and enforcing case staffing guidelines.

Creation, movement and data are the three core components of an electronic billing project for a law firm. A general counsel usually wants a company to receive its invoices electronically from its outside firms. The creation and movement of the electronic invoice is the key component of the e-billing process. The creation of the actual invoice on the law firm side tends to be the most challenging. The specific e-billing data format and requirements tend to differ from corporation to corporation; today there are, by and large, little or no true standards.

The Legal Electronic Data Exchange Standards, LEDES (a standard for organizing the information on an e-bill invoice) and the Uniform Task-Based Management System (UTBMS) task-based billing code sets (a methodology and code set for lawyers to digitally code their time) have appeared to set standards for the legal industry and therefore simplify the creation of an electronic invoice. In reality, these standards have unfortunately been modified by so many corporations to the extent that they are therefore not standards. In many other industries the electronic flow of data is standardized by similar trade organizations as a way of reducing costs and improving systems.

Selecting a Vendor

There are quite a few vendors in the marketplace offering corporate legal departments the ability to process e-billing from law firms. The key to choosing one that fits your needs is to understand the differences between each vendor's systems and seek out a solution that adheres to your corporate IT standards while meeting the basic needs of your legal department.

Implementation of the e-billing system requires serious planning, from beginning to end. A single point person should be chosen to be responsible to ensure all parties are working together. In addition, the e-billing system should be tested for about a month or so and then put into the system play with all of your firms. It can take about six to nine months of e-billing data to begin evaluating its benefits and perform a valid statistical analysis. From there, you should encourage your firms to submit their e-bills through a central e-billing hub to further provide all parties with a faster turn-around time and less rejections.

Managing Relationships and Performance

Law firm relationships need to be handled carefully with the implementation of an e-billing system. Scheduling regular meetings with law firm staff helps with performance issues and with exceeding corporate expectations. Law firm counsel may want metrics to rate the firm against other firms in the industry. Client satisfaction, outcomes and billing guideline compliance are just a few of the factors that could be measured. These are just a few ideas in mining your e-billing data for future use to continually facilitate efficiency and improve controlling of outside expenses.

Reliable information collected from electronic billing systems helps the firm stay better informed about the legal services their clients need. The firm administrators have access to internal staff productivity and can make better-informed staffing and rate decisions. The hourly pricing model still dominates the legal marketplace but efficiency in the actual delivery of legal services is still the key component. Hourly rates may be negotiated at a discount, but this does not necessarily have to place pressure on firm profitability. Legal services should be viewed as a collaborated effort; corporations want good service while controlling costs and law firms want a fair profit on their work. Both parties want value. With e-billing, both parties can review the same information in an efficient manner and compare both work provided and results against other firms competing for the same legal services.

Preparing For the Future of E-Billing

Recent progress by the LEDES Oversight Committee has generated a next-generation of e-billing data formatting called LEDES XML. This new standard attempts to close the gap between law firms and corporations so that a single flexible e-billing format and data type can be used by all parties. The XML format attempts to also deal with some of the new complexities of e-billing by global clients and law firms. These complexities include such items as currency conversions, taxation of legal services in various regions, regional compliance issues, budgeting standards, and standardization for types of discounting. Many time and billing vendors are ahead of the curve and have already incorporated the LEDES XML standards into their software in anticipation of adoption.

When a client requests e-billing, your initial tasks should include the following:

- If not clearly outlined in the materials sent from the client, meet with the client to confirm the firm's responsibilities and expected timelines, and to identify whom to contact if problems arise.

- Completely review the client requirements including such items as, approved expenses, attorney rates, phase and task code requirements, budgets, etc.

- Set up your internal team, and identify responsibilities:

  Who is responsible for setting up task codes in your e-billing system, including client and matter information, work locations, timekeepers and their billing rates, etc.

  Who is responsible for ongoing tasks once the system is live, including updating case information, and budgeting.

  Who will actually submit the manual e-bill invoices and have login and password permissions. If you are using a central e-billing hub most of this is handles automatically.

- Update your time and billing system:

  Identify the client as an e-billing client (preferably through a new business intake process that supports requests for e-billing).

  Ensure the system is set up to properly format entries and apply the client-required codes.

  Modify LEDES e-billing templates as necessary, including all customizations that would involve the time and billing vendor. This may not be necessary if using a central e-billing hub.

  Update unbilled time to comply with the new e-billing requirements, if necessary.

- Provide training to the specific attorneys who might work on this matter and the billing staff within the firm so they are aware of all the clients' requirements.

Contributed by Jane Bennitt, a consultant with Baker Robbins & Co., and president of the Legal Electronic Data Exchange Standard (LEDES) Oversight Committee.

ILTA E-Billing Survey

The suggestion to update the 2004 ILTA e-billing survey first arose at the 2007 ILTA Summer Conference. We contacted members of the 2004 survey team about their interest in participating and then recruited others in this effort. We decided on our first call to run two different surveys in order to present both the law department and the law firm perspectives on e-billing.

Team Members

The law department survey team included:

Jane A. Bennitt, Baker Robbins & Company, Law Department Survey Leader
Gabriela Isturiz, eBilling Hub
Rebecca Thorkildsen, Baker Robbins & Company
Jennifer Zimmerman, Husch Blackwell Sanders LLP, ILTA Representative

The law firm survey team included:

Daniel Foster, Serengeti Law, Law Firm Survey Leader
Greg Coticchia, eBilling Hub
Daniel Isturiz, eBilling Hub
John Sampieri, Liberty Mutual Insurance Company, ILTA Representative
Robert J. Thomas, Serengeti Law
Peggy Wechsler, ILTA program director, served as our Advisor.

Objectives

The law department team wanted to determine what law departments are really doing with their e-billing systems. Is e-billing today still mainly a pipeline to receive invoices or has it evolved into a matter-centric tool where e-billing is a component of the overall system? How collaborative is e-billing today? What features are being used by law departments? Who is participating in e-billing, is it only law firms or are other legal vendors using these systems? How global is e-billing today? What are client's expectations? Are they using the data they receive and, if so, how? And how satisfied are they with the features and tools available within their systems?

The law firm team had different objectives. We have heard anecdotally for years that e-billing is a huge burden on law firms and we wanted to quantify the burden in a way that other surveys conducted have not been able to. How pervasive is the request by clients to participate in e-billing? Are law firms using the systems the way their clients expect them to? What issues exist? Which client requirements are troublesome for firms? Most important, however, are four questions: What do they like and dislike about systems they use, what best practices would they recommend to others using the system and what changes would they recommend vendors make to their systems.

Surveys

The law department survey contained 73 questions plus 4 more classification questions. The law firm survey contained 9 classification questions, allowed participants to respond to 33 questions on up to 3 different systems used by the law firms, and requested that respondents consider the most difficult implementation they had with that system.

The surveys were open to respondents during the month of October. It was sent to member of the LEDES Oversight

Committee as well as to consultants, e-billing and time and billing vendors with a request that they distribute the links to law firms and law departments they work with. Our thanks goes out to everyone who forwarded the survey links as we requested, but understand that distribution of the links, especially by the e-billing vendors, could have impacted the systems reviewed by survey participants.

Compilation of Results

The law department survey analysis was performed by Jane Bennitt. Jonathan J. Laubinger from Liberty Mutual joined the law firm team to perform the law firm survey analysis. Rob Thomas provided guidance as to content, style and presentation of these white paper results, and he served as our editor.

The results presented are based on responses from respondents who indicated that their firm or company uses an e-billing system.

Most of the survey questions were not required, so the number of responses to each question isn't consistent throughout the survey. Also, depending on the response to a question, the survey might skip some questions. Some questions allowed for more than one response and, for these, the results are based on the number of respondents replying to the question, not the overall number of responses.

Finally, other than identifying the systems used by survey participants, we do not connect a system or vendor name with any of the comments made.

Law Department Survey Results - Analysis

by Jane A. Bennitt

Of the 51 respondents, 37 (72.55%) were law departments that currently use e-billing.

Respondent Demographics

Most respondents were the e-billing system project manager (29.73%), those who administer the system (21.62%), those who have oversight responsibilities in the program and day-to-day responsibilities for using the system (18.92%), or the e-billing project sponsor at their company (13.51%).

The largest categories of respondents' companies were manufacturing (18.92%), insurance/risk management (16.22%), banking/securities/financial services (13.51%), and consumer products/retail (13.51%). A majority of respondents had more than $100 million in worldwide revenue in 2007 (57.14%) [more than 20% didn't know], and had more than $10 million in legal spend in 2007 (57.58%) [18.18% didn't know].

[1] An in-house created system is developed internally by staff at the company, and a proprietary system is created for the company by an external vendor.

System Used/Reasons for Selection

Systems used by respondents included:

System	% Resp
Serengeti Tracker	27.03%
TyMetrix T360	21.62%
Aims by DataCert	18.92%
Legal eXchange by Bottomline Technologies	5.41%
Smart Invoice/eCounsel by Bridgeway Software	5.41%
Team Connect/Collaborati by Mitratech Software	5.41%
TyMetrix Legacy Systems (not T360)	5.41%
PACE by Navigant Consulting	2.70%
In-House created system[1]	2.70%
Proprietary system created for the company[1]	2.70%

The information above regarding use of specific systems is not indicative of market share or frequency of use of systems by law departments.

We asked respondents why they selected the system they use and allowed for multiple responses. The most common reasons were: price (55.56%), technical expertise (47.22%), a specific feature or features in the system (44.44%), the cost to outside counsel (41.67%), service (33.33%), reputation (30.56%), salesperson (19.44%), recommendation from another law department (19.44%) and recommendation from outside counsel (19.44%). It was surprising to see that only 2.78% of respondents cited the recommendation of a consultant as a factor in selecting their system.

Only 2 respondents (5.41%) had previously attempted e-billing with another vendor, and we expect this statistic to climb over time. Their reasons for changing vendors were similar: poor service, system unreliability, cost and features.

Why Implement E-Billing?

The primary reasons for implementing e-billing were to: better control legal costs (cited by 94.59% of respondents); better manage outside counsel (94.59%); provide more accurate reporting information to management (83.78%), to better organize matters and/or spend processes (51.35%); manage legal more like a business (27.03%), to better understand and manage risk (27.03%); ensure compliance with workflow protocols (24.32%); and better manage internal resources/ support resource allocation (21.62%).

The survey asked respondents to rank a list of the benefits of e-billing on the basis of importance, whether or not that feature is available within their system. Using a weighted average where the lowest number indicates the highest priority, the results are as follows:

Benefit	Weighted Average
Automated routing of invoices for approval	3.19
Paperless billing	3.62
Ability to collect and report on detailed invoice data	3.71
Automated rules testing to ensure compliance with outside counsel guidelines	3.81
Reduced processing time	4.76
Integration with AP and other internal systems	5.43
Ability to collaborate with outside counsel	5.9

The primary features or functions that attracted the respondent to the specific system that they selected were invoice testing/review/approval workflows (30.56%) and the ability to integrate the e-billing system workflows with other systems maintained by the company (25%).

Cost of the System

Almost half of respondents (45.95%) pay an annual subscription fee for the software/service. Much smaller numbers of users pay a perpetual license fee, with annual maintenance costs (16.22%), a percentage of the invoice value billed (13.51%), a fee based on the number of matters in the system (5.41%), or apply a discount to law firm invoices to pay for the system (2.70%).

Almost half of respondents (48.65%) said that law firms are not charged to use the system. Much less frequent were an annual subscription model where the law firms pay annually for the software/service (21.62%), where the company paying a percentage of the invoices processed through the system (13.51%) and where the law firm directly pays the vendor a percentage of the invoice value billed (5.41%).

The survey documents a shift in thinking about who should bear the cost of the e-billing system. A majority of respondents (56.76%) felt that law departments should bear the system cost for e-billing, 29.73% said law firms should share the costs with our company, and only 13.51% said that firms should bear all of the cost of e-billing. It will be interesting to see if this trend continues in the future, especially in a bad economy.

System Usage

The rapid recent growth of e-billing is apparent from the fact that only 18.18% of respondents have been using their system for five years or more. One-third of respondents (33.33%) have been using their system for less than two years.

In terms of the number of system users at the law department's company, more than half (51.35%) are being used by less than 50 users. Less than one-third of respondents (29.73%) have more than 100 internal users, and only 8.11% of respondents were in law departments with more than 300 users. We did not ask what percentage of the law department's overall employees this represents, so we are not able to comment on whether the number of users is an attribute of smaller law departments responding to the survey, or because only a small percentage of the people in the law department use the e-billing system.

We wanted to assess usage of the system for managing open matters and were surprised by the fact that, for many users, e-billing covers only a fraction of their open matters. A small minority (10.81%) of respondents indicated that all open matters are run through the e-billing system, while 45.95% reported that 75-99% of open matters are e-billed. We can not assess whether high system usage is a function of wider adoption of the system across the law department, insistence that all law firms participate, or whether law departments have been successful in connecting law firms who handle the largest volume of files to the e-billing system. It could be that respondents did not count internal matters (those not involving outside counsel) or that the implementation only involved the law department's highest volume firms.

We also wanted to assess overall usage of the system by outside counsel. While 8.11% indicated that all outside counsel use the system, another 54.05% said that 75-99% of outside counsel firms used the system. This leads to questions for the next survey: Are law firms more amenable to participating in e-billing because more clients are asking for it? Are law departments better able to require law firms to participate in e-billing? Is convergence a factor?

Similarly, we asked about usage of the system by non-law firm vendors. Nearly half (45.95%) said that non-law firm vendors do not participate in e-billing. Beyond that, the responses were mixed. While 24.32% said that 1%-10% of non-law firm vendors use the system, the next highest response (10.81%) said that 75%-99% of non-law firm vendors use the system. Anecdotally we have heard of increased participation in e-billing by global IP vendors and it would be interesting to investigate what types of matters are being worked on by these non-law firm vendors.

We asked about the number of countries from which the law department receives e-bills. Nearly half (45.95%) receive invoices from one country only, and 29.73% receive invoices from 2 to 4 countries. Of note, however, 8.11% receive invoices from 50 or more countries! In order to provide perspective to these numbers it would be interesting to ask in how many countries overall the law department has legal work, and what types of matters are being worked on by global firms.

We asked respondents to identify barriers which prevent a higher percentage of law firms or non-law firm vendors from participating in e-billing and allowed for multiple responses. Six main barriers were identified: the number of cases being handled (mentioned by 43.24% of respondents); the technical savvy of the law firm (29.73%); the cost (24.32%); the availability of technology (21.62%); the law firm size (18.92%); and the program does not support global e-billing (10.81%).

Getting Started with E-Billing

Most respondents (75.68%) said that it took law firms less than 2 months to submit invoices after their e-billing start date.

Respondents did not perceive it to be difficult for law firms to begin e-billing, with 67.57% responding that it was easy or very easy. The survey also asked, regardless of the cost or inherent difficulty, whether respondents viewed participating in e-billing as a firm's cost of doing business with the law department. Overwhelmingly, respondents agreed (75.68%).

Technical Platform

In the past, many law departments had concerns about having the data related to their legal spending hosted by vendor systems outside of their corporate firewalls (the ASP data model). This concern appears to have diminished. Respondents were nearly evenly split on whether they preferred having e-billing through an ASP or installed on servers that sit behind their firewall, with ASPs now coming out ahead: While 37.84% preferred the ASP model, 35.14% preferred behind the firewall. An almost equal number had either no opinion (16.22%) or responded "I don't know" (10.81%).

Of those who preferred the ASP model, most (78.57%) stated it was preferred because the system does not require support from IT. Of those who preferred the behind the firewall model, most (53.85%) stated it was preferred because they believed the platform was more secure or because they have more control over the system (38.46%).

One conclusion we can draw from the above, then, is that the ASP model may no longer be seen as a security issue by a majority, which is more interested in the convenience/lower IT costs associated with using an ASP.

System Features

We asked respondents to identify components they have in their system, and to rate how well the feature works in their system. The table below shows the percent of respondents who have the features in their system, and a weighted average rating of how well the feature works in the respondents system where 5 is Excellent and 1 is Poor.

% Respondents With Feature	Feature	Weighted Average
97.22%	The system validates billing rates for timekeepers on invoices submitted to the system	4.14
91.67%	The system maintains a list of cases	4.27
86.11%	Information on outside counsel timekeepers is required	3.26
80.56%	The system is collaborative and both law department/internal staff and outside counsel provide information on matters	4.27
80.56%	Outside counsel timekeepers must be identified as working on a matter	4
77.78%	Budgeting is required; is entered by law department/internal staff	3.21
75.00%	Multi-currency functionality such that invoices can be submitted in one currency and reviewed or paid in a different currency	3.44
75.00%	New cases are assigned to outside counsel from within the system	3.78
72.22%	Invoices submitted are tested against the available budget and are flagged if they exceed the available budget	3.69
72.22%	Law department/company staff provide information on how the case was resolved in order to close a case	3.35
66.67%	Case assessments are required from internal staff	3
66.67%	The system provides functionality to enter manual payments to be made to outside counsel	3.71
66.67%	The system provides timekeeping functionality for outside counsel to record time and expenses on matters and then to generate invoices	3.33
61.11%	Law firms are required to submit case plans or assessments via the system	2.91
58.33%	Law firms submit case plans or assessments in a predefined format and these are imported into the system	3.05
58.33%	The system provides functionality for staff/inside counsel to record time and expenses worked on matters and generate invoices	2.95
58.33%	The system provides functionality to report accrual information on invoices that are pending and not yet paid	3.38
52.78%	Budgeting is required; is entered by outside counsel staff directly into the system	3.26
52.78%	Invoices submitted are tested against the available budget and are rejected if they exceed the available budget	3.26
52.78%	The system provides functionality for law firms to provide accrual information for unbilled time at the law firm	3.16
50.00%	Law firms provide budgets in a predefined format and these are imported into the system	3
47.22%	Outside counsel staff provide information on how the case was resolved in order to close a case	2.59

It is interesting to note that a clear majority of law departments are using their e-billing systems to accomplish tasks that were traditionally considered matter management (e.g. case assessments required from internal staff (66.67%), law firms submit case plans or assessments through the system (61.11%) or in a predefined format that are imported into the system (58.33%)).

One irrefutable conclusion: E-billing today is much more than just a pipeline to receive, review and approve invoices.

Case Management Features Required to Administer E-Billing

Most commonly, new cases originate as matters in the company's matter/claim/case/IP management system and are fed into the e-billing system (40.54%) or are entered by the company's staff directly into the e-billing system (29.73%). A minority of respondents (18.92%) reported that the company's staff enter new cases in both the e-billing and the company's matter/claim/case/IP management systems, a process that may be eliminated by combining, or creating connections among, systems.

The survey asked how the law department determines which law firm should receive a new case assignment and allowed for multiple responses. Most frequently (78.38%) the company's staff chooses, or the company's internal matter/claim/case/IP management system provides guidance in making this decision (35.14%). There were indications that e-billing systems identify approved law firms (13.51%), firms who handled the same type of cases in the past (13.51%), preferred law firms (10.81%), firms in the appropriate geographic location (10.81%), firms who practice in the jurisdiction/venue (10.81%), firms who have (generally) been referred cases in the past (10.81) or identify attorneys by specialty or area of expertise (10.81%). Only three respondents (8.11%) indicated that their e-billing system will recommend the firm best suited to handle the case based on the evaluation of results achieved in the past. There exists opportunity for e-billing systems to provide guidance in this area, either by providing reports with relevant data or by providing a specific recommendation.

The survey asked whether it is necessary to update case information in the e-billing system and, if so, who handles it. Only 27.78% of respondents indicated that case information is not updated, indicating that the majority of respondents use their e-billing system for matter management functions as well. Of the remaining respondents, 38.89% said case updating is handled by the company's staff, 22.22% said it can be done either by their staff or by outside counsel, and 5.56% said it is handled by outside counsel.

Rating Outside Counsel Performance

There is an almost equal split between the respondents who have a system that helps them subjectively rate outside counsel performance (43.24%), and those who do not have this functionality (45.95%). The remainder (10.81%) did not know if the functionality is available.

Some e-billing system can also objectively rate outside counsel performance based on an electronic evaluation of a number of different factors associated with the matter, but this usually requires information on how the case was ultimately resolved. The majority of respondents (43.24%) indicated that their system does not require the entry of resolution information, while 35.14% of respondents said that it is handled by internal staff and 5.41% of respondents indicated that it could be entered by either internal staff or outside counsel (16.22% did not know how this is handled).

Closing Cases

Only 2.70% of respondents indicated that their system automatically closes cases that have not been billed, identifies cases that have not been billed and are pending closure, or provides an audit report of cases closed in this manner.

Requiring Case Management Plans

The survey asked when case management plans from outside counsel were required in the system and accepted multiple responses. Significant numbers of respondents either do not require case management plans (13.511%), or did not know (29.73%). Most (32.43%) require the case management plan to be submitted at the beginning of the case. Among the rest, there was not a consensus. Some require case management plans to be submitted based on a specific time period (monthly/quarterly (2.70%) or yearly (once a year (2.70%) or more than once each year (5.41%)), based upon the phase of litigation (discovery (5.41%), settlement (8.11%), trial prep (5.41%) and appeal (8.11%)), coinciding with usage of the UTBMS billing codes (2.70%), upon significant developments in the case (2.70%) or when a status report is required (2.70%).

Of the respondents who require case management plans, only one indicated that they required a case management plan only once during the case. The remainder (95.25%) requires them at multiple points over the life of a matter.

While 15.79% of respondents indicated that case management plans were provided by the company's internal staff, and 10.52% indicated that it is a collaborative effort by internal staff and outside counsel, 15.79% have law firms enter the data into the e-billing system, 26.32% have law firms provide a file that is imported or entered directly into the system. 15.79% of respondents did not know how case management plans were provided.

Budgeting

One-quarter of respondents (27.03%) do not require budgets. Budgets are most commonly provided by phase (32.43%), by case and timekeeper (18.92%) and by activity (16.22%). Only 16.22% of respondents indicated that their system rolls up budgets for each firm assigned on the matter into a combined budget for the matter.

Most (79.17%) require budgets at multiple points over the life of the matter. Most budgets are created by outside counsel: 41.67% provide it in a file that is imported into the system and 29.17% enter it directly into the system. The rest (25%) have the law department enter budgets.

Budgeting is tied to the electronic rules testing applied to system invoice submissions, with 58.33% indicating that an invoice could be rejected if a budget is overdue or not approved, or if the available budget is insufficient to cover the amount of the current invoice.

E-Billing Requirements

Most respondents (67.57%) do not use purchase order numbers and, of the remainder, 21.62% do not require the purchase order number to be included in the electronic invoice submission.

Almost a quarter of respondents (24.32%) do not use a fee formula other than hourly billing (alternative fee agreements or AFAs) for outside counsel participating in e-billing. Of the remainder who do, 32.43% store information on the nature of the AFA in the e-billing system, and 21.62% store information on the nature of the AFA external to the e-billing system in a manual or separate electronic system.

Almost half of respondents who use alternate fee arrangements (47.83%) require their firms to submit information on the hours worked in addition to submitting their AFA invoice. This is presumably to determine whether the AFA or paying by the hour was better for the client

Only 10.81% of respondents do not require some kind of coding of time and/or expense entries. Coding is used predominantly to analyze the services performed (67.57%), for electronic rules testing (64.86%), reporting (37.84%) and to facilitate budgeting (27.03%). Codes are also used to facilitate case management processes (24.32%), to rate law firm performance (21.62%) and because the system requires them (2.70%).

Of those who require coding, 90.32% require Expense Codes, 77.42% require Task Codes, 64.52% require Activity Codes, and 19.35% require Phase Codes.

Of respondents who require coding, most accept the original Litigation (68.75%), Project (50.00%), Counseling (46.88%) and Bankruptcy (40.63%) code sets set forth by the American Bar Association in the early 90's, the LEDES Oversight Committee's ("LOC's") Patent (21.88%) and Trademark (21.88%) code sets set forth in 2007, the LOC's Revised Project code set (9.38%) ratified in 2007, and the Defense Research Institute's Revised Litigation Code Set (3.13%). While 15.63% of respondents indicated that they customized one of the standard code sets, only 6.25% said that they created a customized code set unrelated to any of the standards.

Although 21.62% of respondents do not require documentation for any expenses included on an invoice, 40.54% require documentation for any expense on the invoice regardless of amount and another 5.41% require documentation for certain types of expenses regardless of the amount.

The majority of respondents' systems (62.50%) provide a mechanism to upload expense documentation when the invoice is uploaded. There is opportunity for improvement here as a significant number (20.83%) said that they still receive this documentation by mail.

While more than one-quarter of respondents (27.03%) indicated that they do not have a rule requiring the submission of time and expense entries within a specified period of time, many (40.54%) do require this information to be submitted within 6 months. The longest time period for submission, up to two years, was mentioned by 8.11% of respondents.

Invoice Review and Approval

The survey also requested information regarding who reviews invoices for errors and has the ability to reject them. A majority (72.97%) of respondents' systems have electronic rules checking. Case managers or the responsible internal attorney (72.97%) are predominately responsible for reviewing invoices. 27.03% of respondents have implemented a centralized bill review team, and 16.22% have a bill review specialist not associated with a centralized bill review team review invoices. About half of respondents (45.95%) indicated that they require multiple levels of invoice review and approval, which we thought was low considering the need to enforce approval authorities.

We asked about the typical cycle time from receiving a bill to issuing payment. Almost half of respondents (48.65%) say the cycle time is 30 to 59 days after receipt, and more than one-quarter (27.03%) said payment typically issues within 29 days of receipt. Unfortunately 16.22% said the cycle time is 60-89 days, and 8.11% said it is 90-119 days, indicating that there is room for improvement.

The most common invoice errors noted by respondents are unapproved timekeepers (19.44%), billing for unapproved work or expenses (13.89%), duplicate invoice submissions (11.11%) and items charged to the wrong matter (8.33%).

While 40.54% of respondent's systems automatically inform law firms of the reason an invoice is rejected, 35.14% of respondents do not analyze invoice rejections and only 10.81% said that information from the analysis of invoice rejections is provided or discussed during a meeting with the firm to review services provided.

Invoice Payment

Most respondents (75.68%) pay outside counsel by check and another 5.41% are paid using same day check. This represents a very real opportunity for additional cost savings to be incurred by implementing electronic funds transfer (EFT) payment. Another 40.54% of respondents pay via wire transfer, which are more expensive payment instruments than EFT. EFT is used by only 34.14% of respondents.

Of the respondents who make electronic payment, more than half (57.14%) make a single payment for all invoices paid that day.

The majority of respondents (69.23%) have implemented some kind of float associated with payments such that invoices must remain in the system for a specified number of days before payment can issue, regardless of how soon the invoice is approved for payment. This reduces the main promised benefit to outside counsel participating in e-billing, the promise of faster payment.

Reports

While 5.41% of respondents state that their system does not include reports, 16.21% have never used or seldom use the reports available in the system. It was encouraging to see that 24.32% of respondents use the reports often and 35.14% use them all the time. We did not ask whether the system permits the export of report data to Excel or Access.

A majority of respondents rated the reports available to them in their system as excellent (25%) or very good (28.13%). A small minority (9.38%) said that the reports available were poor. It was encouraging to note that 87.10% of respondents are able to customize the parameters for the system-provided reports by changing selection criteria, sorting, grouping, etc.

Only 34.38% of respondents indicated that the e-billing vendor created custom reports for them to use and, of this group of respondents, only about one-third (36.36%) were charged by the vendor for the custom reports created. This may be an indication that e-billing systems are becoming more sophisticated in permitting law departments to configure their own reporting without vendor assistance.

Only one-quarter of respondents (25%) indicate that the system they use provides report cubes. (A report cube a/k/a pivot table allows users to look at a two dimensional report, select an element in those two dimensions and click into it. The user then pivots into the selected data element to see additional analysis for the single subset of data. Cubes allow the user to delve deeper into the data set and provide additional analysis at the discretion of the user.) We did not ask whether the system permits the export of data to Excel or Access where cubes can be created.

More respondents (40.54%) reported that their system provided an ad-hoc report creation tool that was part of the system, while 32.43% use an external report creation tool like Crystal Reports or SQL Report Writer. Of the remainder, 16.22% do not have the ability to create ad-hoc reports in their program, which could be a function of their user rights.

Most respondents rated their report creation tool as excellent (11.11%), very good (51.85%) or good (25.93%)

We asked about the availability of dashboards in the system. (A dashboard is a screen that gives information on tasks that need to be handled, and could rate historic performance using the system and identify areas where the user's performance could be improved.) While many respondents (40.54%) do not have dashboards in their system, 54.05% report that dashboards are available for internal staff and 18.92% have them for outside counsel.

Most dashboards (68.42%) are specific to the user or the user's role in the system. Most (73.68%) contain information on tasks that need to be handled by the user. Only 10.53% of respondents indicated that dashboards contain information on the user's historic performance in using the system, and another 10.53% of dashboards identify areas where the user's performance can be improved.

Only four respondents' systems (10.82%) included scorecards. (A scorecard is a predictor of future performance and measures progress toward goals. Scorecards, if available in an e-billing system, are likely available only to management. The reference to scorecard here is not intended to mean a system whereby the user subjectively rates the performance of a law firm in handling matters.) Half of these contained scorecard measures defined by the e-billing vendor and the other half were defined by the law department's management team. Optimally, systems should allow law departments to define their own goals, and to change the scorecard measures once it is demonstrated that a goal has been achieved, thereby making the e-billing system a tool of the law department to track progress toward achieving goals.

Of the four respondents whose systems contained scorecards, three (75%) are able to reconfigure scorecard measures without assistance from the vendor and without additional cost or charge. Also encouraging, three (75%) reported that management meets either quarterly or at least yearly to review the scorecard measures and discuss progress toward goals.

System Satisfaction

Law departments seem to have a high-level of satisfaction with the overall systems being used, which is surprising given lawyer's general skepticism with the technology.

Most respondents indicated that significant value had been gained (51.35%) or some value had been gained (32.43%) by implementing e-billing, and that the system met (48.65%) or exceeded (24.32%) their original expectations. Most intriguing, however, was the one respondent who indicated that e-billing was a mistake. In researching this a little further, it turned out to be a company that developed their own e-billing system in-house and was looking to replace the system. It may be that good e-billing functionality is far more complicated to deliver than one might think.

We asked respondents to rate their satisfaction with the vendor, service by the vendor and the system. The table below shows the weighted average rating given to the feature where 5 is Excellent and 1 is Poor.

Feature or Service	Weighted Average
The vendor's corporate implementation services	3.94
The vendor's training services	3.77
The vendor's system manuals and documentation	3.71
The vendor overall	3.92
The system speed	3.84
The system reliability	3.95
The system stability	3.97
The ease of use by corporate staff	3.92
Price	3.86
Ability of system to meet our needs	3.7

Law Firm Survey Results – Analysis

by Jonathan J. Laubinger

Demographics

Four-hundred and sixty respondents filled out the e-billing survey. A majority of respondents (56.95%) were billing managers or billing clerks. A significant number designated their positions as "Other" (32.67%), with the most common titles being accountants, controllers, IT specialists, and office managers. The remaining respondents were mostly partners or paralegals, with one associate.

The vast majority of law firms (80.85%) consider it unreasonable for a client to request the firm use a certain e-billing software package and then expect the law firm to pay for it. When asked why, many firms responded that because clients request the system and are the main beneficiaries, the clients should pay for the system. In addition, firms are not typically included in the decision process: only 2.7% of firms were actively involved in selecting the vendor system that they were asked to use. Of those who did not feel it unreasonable, when asked why they felt this way the reasons all indicated a maturity of understanding of the importance of the client to the firm, satisfaction with the system used, efficiencies gained and faster payment.

When asked if their firm had at least one dedicated, full-time e-billing professional, just over one-half responded affirmatively (54.75%). Nearly all firms perform e-billing functions in-house, with only 10% of firms outsourcing the e-billing function or obtaining a middle-ware service to administer e-billing.

Most firms report that a small number of clients request e-billing, but that these clients constitute a disproportionately large amount of revenue. Overall, the majority of firms (40.13%) stated that less than 10% of their clients had requested e-billing; and 28.10% of respondents overall indicated that these clients represent over 30% of their revenues.

The average respondent firm reported using 7.55 e-billing systems. Half of respondents use 1-5 systems (47.40%) and another 27.54 report using 6-10. The rest of the respondents (23.93%) use more than 10 systems, including 10 respondents using 25 or more different systems for their clients.

Responses and Systems Used

As stated above, this survey was filled out by 460 law firm respondents. Firms were allowed to submit survey responses for up to 3 different e-billing systems. There are 160 respondents that submitted multiple responses, for a total of 620 responses. Even though most firms chose to provide detailed responses about only one e-billing system, many more report using multiple systems as summarized in Demographics above.

Here is a complete list of the different systems used by any respondent. The 10 most frequently used systems account for 90.04% of the responses. As stated above, because most law firms use more than one e-billing but only chose to provide detailed information about only one of the systems that they use, this table is not indicative of frequency of use or market share.

System Set-Up and Maintenance

System	Response %
Advanced Invoice Management System (AIMS) or ShareDocs/Legal by DataCert	27.96%
Serengeti Tracker by Serengeti Law	14.85%
TyMetrix 360 or TyMetrix Legacy Systems (not T360) by CT TyMetrix	13.90%
Legal eXchange by Bottomline Technologies	10.90%
CounselLink, Examen or Legal Precision by LexisNexis Examen	9.32%
Expense Performance Management Suite by Allegient Systems	3.63%
Litigation Advisor by Computer Sciences Corporation, formerly Legalgard	3.63%
(The) Advocator System by Legal Solutions Group	2.37%
Proprietary system developed by client	1.90%
DirectInvoice or Smart Counsel by CT TyMetrix, formerly Tripoint	1.58%
Our firm does not e-bill	1.58%
Visibillity by Bottomline Technologies, formerly Visibillity	1.58%
Bridgeway Solutions Product Suite or Corridor by Bridgeway Software	1.11%
TrialNet Matter Management & E-Billing by TrialNet, formerly Peerpoint	0.63%
Ariba	0.47%
Eliot (CSC)	0.32%
iClear by First American	0.32%
Lawtrac by LT Online Corporation	0.32%
Legal Solutions Suite by CSC formerly Litigation Advisor formerly Law Audit Services	0.32%
OB10	0.32%
PACE by Navigant Consulting, formerly Peterson Consulting	0.32%
ProLaw by Thomson Elite	0.32%
TeamConnect or Collaborati by Mitratech Software	0.32%
ValidZone	0.32%
XIGN by JP Morgan Chase	0.32%
Anaqua	0.16%
Claim Intelligence	0.16%
Corprasoft Legal Desktop, Chief Legal Officer or Corprasoft Legal Business Intelligence By DataCert, formerly Corprasoft	0.16%
Counsel Link, Share Doc and TyMetrix	0.16%
Direct Invoice by Direct Commerce	0.16%
LEDES	0.16%
LPS Desktop Invoice Management/New Invoice	0.16%
Request for paper billing with an electronic component	0.16%

Whether creating a new e-billing system for a client or adding a client to an existing e-billing system, law firms are required to perform certain tasks. The five most frequent tasks are: entering timekeepers (69.47%); adding firm users to allow access to e-billing systems (67.37%); entering timekeeper rates (64.30%); providing information to clients on matters assigned to the firm to assist clients in setting up the system (61.55%); and adding client number references to identify clients, subsidiaries, and affiliates (60.58%). Of the standard responses supplied, installing new hardware (1.62%), providing case management plans (9.21%), purchasing new modules to output appropriate billing files (15.83%), and installing new software (19.22%) are the least common tasks.

Most client set-ups take less than 15 hours. More than on-third of the firms (36.95%) report that client set-up takes less than 5 hours per system, 21.39% say it takes more than 5 but less than 10 hours, and an additional 10.53% say it takes between 10 and 15 hours. Monthly maintenance requires even less time, with 71.80% of firms reporting that it takes less than 5 hours a month per system. Another 15.40% fall into the 5 to 10 hour category.

Bill Submission, Rejection, Approval and Payment

Almost two-thirds (60.58%) of firms reported maintaining less than 50 active matters for a specific client. Just slightly less than half of those firms (25.85%) had less than 10 matters active.

Firms report performing the following tasks to submit bills:

Task	% Resp
Upload and submit invoice file through system	92.46%
Include UTBMS Task & Activity Codes	77.54%
Include UTBMS Expense Codes	76.89%
Respond to submission problems	71.97%
Check system to see if invoices submitted successfully	60.66%
Respond to client's rule violations	56.89%
Check e-mail to see if invoices submitted successfully	56.39%
Specialized/manual formatting of your invoices (not in conformance with LEDES standards)	33.11%
Enter information on the invoice, matter or file type as part of upload process	29.34%
The system provides functionality for me to correct certain errors on-line	28.03%
Provide other information as required by client	27.38%
Provide paper or electronic copy of expenses on invoice	24.92%
Multiple invoices per invoice file can be provided to this system	18.85%
Provide paper or electronic copy of invoice	11.64%
Deliver invoice file through automated process scripted by your firm to FTP/SFTP site	9.67%
E-Mail invoice file	8.03%

Most firms (62.16%) submit less than 30 invoices per month through each system, with the largest number (31.40%) submitting less than 10 invoices per month. Most firms (77.69%) spend less than 10 hours submitting bills per client system per month, including problem resolution.

Most firms (68.45%) are informed of their rejections within 1 hour. However, a sizable minority (6.31%) do not receive their rejections for at least two days or longer.

In order to address or resolve the billing issues, firms perform the following tasks:

Task	% Resp
Resubmit bills	82.93%
Edit the invoice file to correct the error	74.96%
Check to see which invoices were rejected or revised	73.33%
Reverse the invoice in the firm's time and billing system, make the corrections and then regenerate invoice file	59.02%
Follow-up with bill reviewer on issues	35.61%
Appeal adjustments taken against the invoice	33.82%
Make additional edits to the invoice file (other than to just correct the error)	32.85%
Generate additional supplemental information (i.e., pdf of invoice, documentation of expenses and/or other information provided by client)	26.67%

Two-thirds of firms (67.65%) spend less than five hours a month per client system dealing with bill rejections/revisions.

A minority of firms (9.42%) report that invoices are approved for payment or rejected by a bill reviewer in less than one day, with a full third (33.12%) indicating that bills are approved or rejected by a bill reviewer within one week. Sadly, 20.62% of respondents indicate that it takes more than one month to more than 5 months for bill reviewers to approve or reject invoices.

Most firms report that only a small amount of bills are rejected: 68.84% state that less than 10% of invoices are rejected either by the system or by the bill reviewer, and 57.79% report that less than 10% of invoices are adjusted by either the system or the bill reviewer.

Also interesting is the firms' payment cycle experience. One-third of firms (32.03%) did not notice any difference in payment speed after implementation of e-billing. Nearly one-third (31.22%) believe that they get paid faster, and only 17.72% believe the payments are slower. The remaining 19.02% were undecided.

Collaboration

One-third (33.11%) of respondents reported that their system does allow the firm and the client to work collectively on the same information. Approximately the same percentages reported that their system does not allow collaboration (31.14%), or that they do not know (35.75%).

Matter Resolution Tracking

When asked if their system tracks information on how matters are resolved, nearly half (42.93%) did not know. Over one-third (37.34%) of firms reported that they had systems that did not track resolution information. A minority of respondents (14.64%) responded that resolution data was entered by the client, and 5.1% responded that such data was entered by the firm.

Budgets

Slightly more than half of respondents (51.52%) indicated that their e-billing clients require budgets. These clients were evenly split between those firms that managed the budgets through the e-billing system (26.32%) and those that managed the budgets externally (25.20%). This is surprising, as one of the main benefits of using an e-billing system is to track budget legal spend vs. actual legal spend, yet half of the firms that use budgets are using them externally. This suggests that e-billing clients are not fully utilizing their system capabilities to include budgeting functionality, or are using systems that do allow for the submission of budgets.

Of those firms that prepare their budgets through the system, the most common tasks required are as follows:

Type of Budget	% Resp
Enter budget amounts per separate matter	88.13%
Enter budget amounts by UTBMS phase or task	35.63%
Enter budget amounts by fiscal year quarter	23.13%
Enter budget amounts by fiscal year month	20.63%
Enter budget amounts by fiscal year	20.00%
Enter budget amounts per matter groups	3.13%
Budget must be approved by the client	51.25%

Most firms that submit budgets (62.81%) spend less than 5 hours a month for each client, and nearly three-fourths (57.74%) submit less than 10 budgets each month. This includes firms that submit budgets external to the system.

Work-In-Progress/Accrual

Only one-fifth (22.31%) of respondent firms report they are required to provide work-in-progress ("WIP") information, with 12.36% providing the information externally and 9.95% providing it through their e-billing system. Almost three-quarters of those firms (72.79%) report that it takes them less than 5 hours each month to provide WIP data to each client.

To provide accrual information, firms must:

Task	% Resp
Enter in unbilled amounts per separate matter	27.87%
Enter in unbilled amounts each month	21.31%
Enter in unbilled amounts before the accrual period ends	16.39%
Enter in unbilled amounts each quarter	8.20%
Enter in unbilled amounts after the accrual period ends	4.92%
Provide unbilled amounts in a spreadsheet via bulk file upload	4.92%
Provide unbilled amounts in a spreadsheet via e-mail	4.92%

Reporting

Three-quarters of respondents (73.84%) report the system provides reports to the firm. The most common types of reports provided include general invoice and billing reports, outstanding invoices, adjustments, and rejections. The majority of respondents (21.88%) did not provide suggestions on additional reports that could be added to the system. Firms would like more reports available to them to track the status of an invoice, from submission through payment. Payment history and adjustment/rejection reports with reasons are also frequently requested. (See Appendix 2, Questions 37 and 38 for more information on reports utilized most frequently and other types of reports law firms would like available in the system, respectively.)

System Cost

When asked who was responsible for paying the e-billing system fee, 46.4% of firms replied that the system is provided at no cost to them. The rest either pay a fee to the vendor (43.5%) or have their invoices discounted to pay for the system (10.1%).

Survey Gold

Questions 40 through 44 represent the real gold to be found within this survey. The responses to Questions 40 (what features do you like best in the system), 41 (what features do you like least in the system), 43 (what best practices or other suggestions could you offer to others using this system) and 44 (what suggestions could you offer to enhance the overall features and usability of this system) have been collected in Appendix 2 to this white paper and we refer you there for more information.

Users said they liked best: systems that are easy to use/intuitive/simple/straight-forward/user friendly (26.95%), the functionality to upload/post invoices (13.71%); and the ability to track the invoice status/submissions/rejections/reductions/payment/appeal status or transparency on the invoice processing (11.58%).

Users provided a long list of features they did not like, but mentioned most frequently that they could not check the status on invoice submissions/ invoices/payments (9.62%); they had to pay a fee to use the system (4.23%); the invoice format requires special formatting/manipulation/manual editing (3.76%); and they were required to enter timekeeper rates (3.76%).

When law firms were asked to rate the e-billing systems that they use, considering ease of use, functionality, features, and requirements, the average rating that they provided was 3.34 (with 5 being Excellent and 1 being Poor).

In order to get the most from an e-billing system, law firms recommend the following best-practices: be patient (5.16%); follow the client's billing guidelines (4.69%); make sure to check the system often/daily/weekly for status of invoices and monitoring of pending issues on invoices (4.69%); make sure to attend training, the more you train the more you will get out of the system (3.29%); make sure that timekeepers are added/updated/approved prior to e-billing (2.82%); make sure that matters are added/updated prior to e-billing (2.35%); make sure that you do not use disallowed key words (2.35%); and train attorneys/billing coordinators/everyone/ timekeepers/users (2.35%).

Law firms also have a wish-list of improvements they would like e-billing software vendors to implement. Topping their list of suggestions, firms would like vendors to: add ability to track invoice status, including whether invoice has been submitted and where invoice falls in review chain (10.53%); e-mail information on invoice submissions/rejections/ approvals/adjustments/payments (6.07%); add reports/ reporting tool for law firms (4.45%); add report showing invoice submissions/rejections/approvals/adjustments/payments (4.05%); Simplify the dashboards/ menus/navigation/system (3.24%); and add features for law firms beyond just the ability to submit invoices (3.24%).

Conclusions

by Jane A. Bennitt

Law departments seem far more satisfied with their e-billing systems then we expected. E-billing functionality today has moved beyond a "pipe" to receive, approve and pay invoice that characterized first generation e-billing system. Matter management features within these systems are more comprehensive than merely the fields necessary to administer e-billing, and collaboration with outside counsel required on non-billing information captured by the system appears to be an expectation. We see signs that the combination of e-billing and matter management information is being used as a business intelligence tool, and while some of respondents' companies are using the system data to run a data-driven enterprise, there is a long way to go in this regard.

Some law departments may not be taking full advantage of the features available within their systems to track budgets, pay their firms faster, have bills reviewed by multiple levels of reviewers (usually to enforce approval authorities), or to run reports. It may be that some of this functionality was not available at the time law departments implemented e-billing, or that the law department wanted to start slowly, but there is opportunity to make systems used more comprehensive should the law department wish to do so. Nonetheless, law department users should investigate functionality, especially reports, already available but not being used on a regular basis and consider other features and configuration options that can be turned on in their current system without much additional cost.

Law departments are beginning to run data-driven enterprises. As business intelligence features within these systems evolve, invoice data supplied by law firms will be the subjected to much more scrutiny. One law firm respondent questioned whether anyone looked at the information they were required to provide. The answer yesterday was "no," today it's "maybe," but law departments are definitely moving in this direction.

A disconnect exists between a client's expectations and a law firm's actual usage of e-billing systems. Many attorneys are not using the systems as expected and delegate their system responsibilities to non-attorney staff members. This may cause unforeseen consequences. An example: If an invoice is rejected electronically because it is over-budget, the law firm may edit the budget to an amount just above the invoice total so that the invoice submission will be accepted by the system. By doing so, attorneys are not providing comprehensive thought on total case cost and fail to deliver information necessary for the law department to achieve their case management/cost planning goals. The end result is an unnecessarily high number of budget revisions over the life of the case. Most importantly, however, if the system uses the number of budget revisions as a factor in objectively rating outside counsel performance, the firm will receive a lower performance rating. In addition, the client may reject such budget revisions made for the purpose of processing bills that exceed the budget.

Law firms, especially attorneys, should realize that the systems used today are not the same basic data pipelines used to transmit invoices a decade ago. Collaboration tied for fourth in a list of 22 system features used by law departments in Question 26 of the law department survey (see Appendix 1). Clients expect law firms to participate in managing matters and attorneys to use the e-billing system. They also expect their legal teams to exchange more than just electronic bills in their online systems — including budgets, status updates, deadlines, exposure estimates, documents and results.

Manual systems and one-off requirements have overwhelmed law firms; law departments need to consider mainstream systems, stick to standards and partner with their law firms. The easiest way to start? Leverage law firms' experience using different e-billing systems when selecting a system by asking for their input before selecting a system, and solicit feedback about the specific features and configuration the law department is considering.

Vendors have obviously concentrated development efforts on establishing, refining and expanding law department system functionality. Law firm systems need better, more comprehensive and efficient tools. Every e-billing vendor reading this white paper should have their development staff review the responses to law firm survey Questions 40, 41 and 44 (see Appendix 2), and perhaps establish a law firm user group if they don't have one already, as well as create a formal mechanism for law firms to submit development suggestions if one does not exist.

Similarly, every law firm system user reading this white paper should review the best practices suggestions provided in response to law firm survey Question 43 (see Appendix 2).

Appendix 1

Law Department Survey Questions and Responses

Q #	LD Question	Response	# Resp	% Resp	Value
1	Please provide your e-mail address so that we can contact you if there are any questions with your response.		51	100%	
		Total	51	100%	
2	Are you currently using an e-billing system?	Yes	37	72.55%	
		No	7	13.73%	
		Unknown/I don't know	2	3.92%	
		Responded to LD survey but should have responded to LF survey (removed from results set analyzed)	5	9.80%	
		Total	51	100.00%	
3	Which vendor system do you use currently? Select only one.	AIMS (Advanced Invoice Management System) by DataCert	7	18.92%	
		DirectInvoice/Smart Counsel by CT TyMetrix, formerly Tripoint	1	2.70%	
		In-House Created System	1	2.70%	
		Legal eXchange by Bottomline Technologies, formerly eVelocity	2	5.41%	
		PACE by Navigant Consulting, formerly Peterson Consulting	1	2.70%	
		Proprietary system developed for our company	1	2.70%	
		Smart Invoice/eCounsel by Bridgeway Software	2	5.41%	
		Team Connect/Collaborati by Mitratech Software	2	5.41%	
		Tracker by Serengeti Law	10	27.03%	
		TyMetrix 360 by CT TyMetrix	8	21.62%	
		TyMetrix Legacy Systems (not T360) by CT TyMetrix	2	5.41%	
		Total	37	100.00%	
4	Please give the name for the proprietary e-billing system developed for your company.	(No response)	0	0.00%	
		Total	0	0.00%	
5	What made you choose this provider to handle your electronic invoicing needs? Select all that apply.	Service	12	33.33%	
		Salesperson	7	19.44%	
		Price	20	55.56%	
		Cost to Outside Counsel	15	41.67%	
		Reputation	11	30.56%	
		Technical Expertise	17	47.22%	
		Specific feature or features in the system	16	44.44%	
		Recommendation from other Law Department	7	19.44%	
		Recommendation from Outside	5	13.89%	

Q #	LD Question	Response	# Resp	% Resp	Value
		Counsel			
		Unknown/I don't know	3	8.33%	
	(Other)	Using other products by same vendor	2	5.56%	
		Is used by other affiliates, divisions or departments of our company	1	2.78%	
		Ability to integrate with matter management	3	8.33%	
		Conversion effort	1	2.78%	
		Recommended by Consultant	1	2.78%	
		Total # of Respondents	36		
6	Has your company attempted e-billing with any other vendor system previous to this e-billing implementation. Select only one.	Yes	2	5.41%	
		No	34	91.89%	
		Unknown/I don't know	1	2.70%	
		Total	37	100.00%	
7	Why did you change vendors?	Poor service, unreliable system, high cost	1	50.00%	
		Price, cost to outside vendors, features	1	50.00%	
		Total	2	100.00%	
8	Why did you choose to implement e-billing? Select all that apply.	To organize our matters and/or spend processes	19	51.35%	
		To better control legal costs	35	94.59%	
		To provide more accurate reporting information to management	31	83.78%	
		To manage legal more like a business	10	27.03%	
		To better manage internal resources/support resource allocation	8	21.62%	
		To better manage outside counsel	35	94.59%	
		To better understand and manage risk	10	27.03%	
		To ensure compliance with workflow protocols	9	24.32%	
		Unknown/I don't know	0	0.00%	
	(Other)	To reduce paper	1	2.70%	
		Total # of Respondents	37		
9	Rank the following benefits of e-billing in order from most important to least important, where most important is 1 and least important is 8.	Paperless billing	21	100.00%	
	(Rating)	1	4	19.05%	4
		2	6	28.57%	12
		3	1	4.76%	3
		4	4	19.05%	16
		5	0	0.00%	0
		6	3	14.29%	18
		7	1	4.76%	7
		8	2	9.52%	16
		Total	21	100.00%	3.62
		Automated routing of invoices for approval	21	100.00%	

Q #	LD Question	Response	# Resp	% Resp	Value
	(Rating)	1	3	14.29%	3
		2	5	23.81%	10
		3	8	38.10%	24
		4	1	4.76%	4
		5	1	4.76%	5
		6	1	4.76%	6
		7	1	4.76%	7
		8	1	4.76%	8
		Total	21	100.00%	3.19
		Automated rules testing to ensure compliance with outside counsel guidelines	21	100.00%	
	(Rating)	1	4	19.05%	4
		2	2	9.52%	4
		3	4	19.05%	12
		4	4	19.05%	16
		5	3	14.29%	15
		6	0	0.00%	0
		7	3	14.29%	21
		8	1	4.76%	8
		Total	21	100.00%	3.81
		Ability to collect and report on detailed invoice data	21	100.00%	
	(Rating)	1	3	14.29%	3
		2	4	19.05%	8
		3	1	4.76%	3
		4	6	28.57%	24
		5	4	19.05%	20
		6	2	9.52%	12
		7	0	0.00%	0
		8	1	4.76%	8
		Total	21	100.00%	3.71
		Lowered transaction costs	21	100.00%	
	(Rating)	1	2	9.52%	2
		2	2	9.52%	4
		3	0	0.00%	0
		4	0	0.00%	0
		5	5	23.81%	25
		6	1	4.76%	6
		7	8	38.10%	56
		8	3	14.29%	24
		Total	21	100.00%	5.57
		Reduced processing time	21	100.00%	
	(Rating)	1	1	4.76%	1
		2	2	9.52%	4
		3	4	19.05%	12
		4	2	9.52%	8
		5	4	19.05%	20
		6	3	14.29%	18

Q #	LD Question	Response	# Resp	% Resp	Value
		7	3	14.29%	21
		8	2	9.52%	16
		Total	21	100.00%	4.76
		Integration with AP and other internal systems	21	100.00%	
	(Rating)	1	1	4.76%	1
		2	0	0.00%	0
		3	3	14.29%	9
		4	2	9.52%	8
		5	3	14.29%	15
		6	6	28.57%	36
		7	3	14.29%	21
		8	3	14.29%	24
		Total	21	100.00%	5.43
		Ability to collaborate with outside counsel	21	100.00%	
	(Rating)	1	3	14.29%	3
		2	0	0.00%	0
		3	0	0.00%	0
		4	2	9.52%	8
		5	1	4.76%	5
		6	5	23.81%	30
		7	2	9.52%	14
		8	8	38.10%	64
		Total	21	100.00%	5.90
10	What is the primary feature of function that attracted you to the e-billing system selected? Select only one.	Invoice testing/review/approval workflow	11	30.56%	
		Ability to integrate the e-billing system workflows with other systems maintained by our company	9	25.00%	
		Workflows defined by the system	4	11.11%	
		The analytics and metrics provided in the e-billing system	3	8.33%	
		The fact that it was web based	3	8.33%	
		The ability to enforce approval authorities	2	5.56%	
		The reputation of the vendor or the system	2	5.56%	
		Collaborative features	1	2.78%	
		Global e-billing features	1	2.78%	
		Total	36	100.00%	
11	Outside of initial setup and design fees, what pricing model applies to your company's e-billing system? Select only one.	Annual subscription model (pay annually for the software/service)	17	45.95%	
		Perpetual licensing model (pay once and then pay annual maintenance - for in-house or hosted system)	6	16.22%	
		We pay the vendor a percentage of the invoice value billed	5	13.51%	

Q #	LD Question	Response	# Resp	% Resp	Value
		Unknown/I don't know	4	10.81%	
		The system was created by in-house resources so the cost is dependant on the amount of services provided by our development staff and the associated technical costs	2	5.41%	
		We pay a fee based on the number of matters in the system	2	5.41%	
		We apply a discount to firm invoices and this in turn is paid by us to the vendor	1	2.70%	
		Total	37	100.00%	
12	What pricing model applies to your law firm's use of the e-billing system? Select only one.	Law firms are not charged to use the system	18	48.65%	
		Annual subscription model (pay annually for the software/service)	8	21.62%	
		Law firm invoices have a percentage reduction applied and this in turn is paid by our company to the vendor	5	13.51%	
		Unknown/I don't know	4	10.81%	
		Law firms directly pay the vendor a percentage of the invoice value billed	2	5.41%	
		Total	37	100.00%	
13	In your opinion, who should pay for the e-billing system? Select only one.	Our company should bear all of the cost	21	56.76%	
		Our firms should share the costs with our company	11	29.73%	
		Law firms should bear all of the cost	5	13.51%	
		Total	37	100.00%	
14	In what year did you first go live with the current system?	1922 - Bad response	1	3.03%	
		2000	1	3.03%	
		2002	4	12.12%	
		2003	1	3.03%	
		2004	3	9.09%	
		2005	6	18.18%	
		2006	5	15.15%	
		2007	5	15.15%	
		2008	6	18.18%	
		Unknown/I don't know	1	3.03%	
		Total	33	100.00%	
15	How many internal users at your company work with the e-billing system? Select only one.	1 - 24	9	24.32%	
		25 - 49	10	27.03%	
		50 - 74	2	5.41%	
		75 - 99	5	13.51%	
		100 - 149	3	8.11%	
		150 - 249	3	8.11%	
		250 - 299	2	5.41%	

Q #	LD Question	Response	# Resp	% Resp	Value
		300 or more	3	8.11%	
		Total	37	100.00%	
16	What percent of your company's open matters are e-billed? Select only one.	1% - 10%	1	2.70%	
		11% - 24%	5	13.51%	
		25% - 49%	3	8.11%	
		50% - 74%	6	16.22%	
		75% - 99%	17	45.95%	
		100%	4	10.81%	
		Unknown/I don't know	1	2.70%	
		Total	37	100.00%	
17	What percent of your outside counsel firms participate in e-billing? Select only one.	75% - 99%	20	54.05%	
		1% - 10%	4	10.81%	
		100%	3	8.11%	
		11% - 24%	3	8.11%	
		50% - 74%	3	8.11%	
		25% - 49%	2	5.41%	
		Unknown/I don't know	2	5.41%	
		Total	37	100.00%	
18	What percent of your non-law firm vendors participate in e-billing? Select only one.	Non-law firm vendors do not participate in e-billing	17	45.95%	
		1% - 10%	9	24.32%	
		75% - 99%	4	10.81%	
		50% - 74%	3	8.11%	
		25% - 49%	2	5.41%	
		Unknown/I don't know	2	5.41%	
		Total	37	100.00%	
19	From how many different countries do you receive e-bills? Select only one.	1	17	45.95%	
		2	7	18.92%	
		3 - 4	4	10.81%	
		5 - 9	3	8.11%	
		10 - 24	1	2.70%	
		25 - 49	1	2.70%	
		50 - 74	1	2.70%	
		100 - 199	1	2.70%	
		200 or more	1	2.70%	
		Unknown/I don't know	1	2.70%	
		Total	37	100.00%	
20	What barriers prevent a higher percentage of your firms or non-law firm vendors from participating in e-billing? Select all that apply.	Not applicable; all firms and non-law firm vendors participate in e-billing	2	5.41%	
		Cost	9	24.32%	
		Availability of technology	8	21.62%	
		Technical savvy of law firm	11	29.73%	
		Law firm size	7	18.92%	

Q #	LD Question	Response	# Resp	% Resp	Value
		Number of cases being handled	16	43.24%	
		Concerns by firms that system does not meet local tax and electronic invoicing requirements	3	8.11%	
		The program does not support global e-billing	4	10.81%	
		Unknown/I don't know	3	8.11%	
	(Other)	Limitations on Companies' AP Program	1	2.70%	
		Only legal firms participate in e-billing	1	2.70%	
		Other depts. not knowing to use system	1	2.70%	
		Our e-billing program has too many bugs/problems.	1	2.70%	
		Outside US, too many complicated laws re e-bills	1	2.70%	
		Volume of cases does not support approach	1	2.70%	
		We don't grant access to non-law firm vendors	1	2.70%	
		Total # of Respondents	37		
21	On average, how long did it take your law firms to submit invoices after their e-billing start date? Select only one.	Less than 1 month	15	40.54%	
		1 month or greater but less than 2 months	13	35.14%	
		2 months or greater but less than 3 months	5	13.51%	
		More than 5 months	1	2.70%	
		Unknown/I don't know	3	8.11%	
		Total	37	100.00%	
22	What is your perception of how easy it was for your law firms to move ahead with e-billing? Select only one..	Very easy	7	18.92%	
		Easy	18	48.65%	
		Neither easy nor difficult	9	24.32%	
		Difficult	1	2.70%	
		Very difficult	2	5.41%	
		Total	37	100.00%	
23	Regardless of the cost to your firms or the inherent difficulty, do you view this as a firms cost of doing business with you? Select only one.	Yes	28	75.68%	
		No	8	21.62%	
		Unknown/I don't know	1	2.70%	
		Total	37	100.00%	
24	Which spend management IT model do you prefer: where software and data are operated outside of your company (ASP) or where your software and data reside inside your company (behind the firewall)? Select only one.	Prefer ASP	14	37.84%	
		Prefer behind the firewall	13	35.14%	

Q #	LD Question	Response	# Resp	% Resp	Value
		No preference	6	16.22%	
		Unknown/I don't know	4	10.81%	
		Total	37	100.00%	
25	Why do you prefer this IT Model? Select only one.				
	(ASP)	System does not require support from IT	11	78.57%	
		The cost savings	1	7.14%	
	(Other)	Access & Support	1	7.14%	
		Ease of collaboration with outside counsel	1	7.14%	
		(ASP) Total	14	100.00%	
	(Behind the Firewall)	We think the platform is more secure	7	53.85%	
		System does not require support from IT	1	7.69%	
	(Other)	We have more control over the system	5	38.46%	
		(Behind the Firewall) Total	13	100.00%	
26	Today many e-billing systems contain expanded functionality or modularized components to supplement basic e-billing functionality. Please indicate all of the features used by your company and rate how well you think this feature works on a scale of 1 to 5 where 5 is excellent and 1 is poor. Select all that apply; include rating for each feature used. Select all that apply.	Multi-currency functionality such that invoices can be submitted in one currency and reviewed or paid in a different currency	27	75.00%	
	(Rating)	1	5	18.52%	5
		2	2	7.41%	4
		3	7	25.93%	21
		4	2	7.41%	8
		5	11	40.74%	55
		Total	27	100.00%	3.44
		The system maintains a list of cases	33	91.67%	
	(Rating)	1	0	0.00%	0
		2	0	0.00%	0
		3	9	27.27%	27
		4	6	18.18%	24
		5	18	54.55%	90
		Total	33	100.00%	4.27
		The system is collaborative and both law department/internal staff and outside counsel provide information on matters	29	80.56%	
	(Rating)	1	2	6.90%	2
		2	3	10.34%	6
		3	9	31.03%	27
		4	8	27.59%	32
		5	7	24.14%	35
		Total	29	100.00%	3.52
		New cases are assigned to outside	27	75.00%	

Q #	LD Question	Response	# Resp	% Resp	Value
		counsel from within the system			
	(Rating)	1	4	14.81%	4
		2	0	0.00%	0
		3	6	22.22%	18
		4	5	18.52%	20
		5	12	44.44%	60
		Total	27	100.00%	3.78
		Case assessments are required from internal staff	24	66.67%	
	(Rating)	1	5	20.83%	5
		2	4	16.67%	8
		3	7	29.17%	21
		4	2	8.33%	8
		5	6	25.00%	30
		Total	24	100.00%	3.00
		Law firms submit case plans or assessments in a predefined format and these are imported into the system	21	58.33%	
	(Rating)	1	3	14.29%	3
		2	4	19.05%	8
		3	7	33.33%	21
		4	3	14.29%	12
		5	4	19.05%	20
		Total	21	100.00%	3.05
		Law firms are required to submit case plans or assessments via the system	22	61.11%	
	(Rating)	1	4	18.18%	4
		2	3	13.64%	6
		3	9	40.91%	27
		4	3	13.64%	12
		5	3	13.64%	15
		Total	22	100.00%	2.91
		Budgeting is required; is entered by law department/internal staff	28	77.78%	
	(Rating)	1	5	17.86%	5
		2	5	17.86%	10
		3	5	17.86%	15
		4	5	17.86%	20
		5	8	28.57%	40
		Total	28	100.00%	3.21
		Law firms provide budgets in a predefined format and these are imported into the system	18	50.00%	
	(Rating)	1	4	22.22%	4
		2	3	16.67%	6
		3	5	27.78%	15
		4	1	5.56%	4
		5	5	27.78%	25
		Total	18	100.00%	3.00
		Budgeting is required; is entered by	19	52.78%	

Q #	LD Question	Response	# Resp	% Resp	Value
		outside counsel staff directly into the system			
	(Rating)	1	2	10.53%	2
		2	4	21.05%	8
		3	5	26.32%	15
		4	3	15.79%	12
		5	5	26.32%	25
		Total	19	100.00%	3.26
		Invoices submitted are tested against the available budget and are flagged if they exceed the available budget	26	72.22%	
	(Rating)	1	2	7.69%	2
		2	1	3.85%	2
		3	7	26.92%	21
		4	9	34.62%	36
		5	7	26.92%	35
		Total	26	100.00%	3.69
		Invoices submitted are tested against the available budget and are rejected if they exceed the available budget	19	52.78%	
	(Rating)	1	3	15.79%	3
		2	2	10.53%	4
		3	6	31.58%	18
		4	3	15.79%	12
		5	5	26.32%	25
		Total	19	100.00%	3.26
		Information on outside counsel timekeepers is required	31	86.11%	
	(Rating)	1	2	6.45%	2
		2	1	3.23%	2
		3	5	16.13%	15
		4	10	32.26%	40
		5	13	41.94%	65
		Total	31	100.00%	4.00
		Outside counsel timekeepers must be identified as working on a matter	29	80.56%	
	(Rating)	1	1	3.45%	1
		2	2	6.90%	4
		3	5	17.24%	15
		4	9	31.03%	36
		5	12	41.38%	60
		Total	29	100.00%	4.00
		The system validates billing rates for timekeepers on invoices submitted to the system	35	97.22%	
	(Rating)	1	1	2.86%	1
		2	3	8.57%	6
		3	5	14.29%	15
		4	7	20.00%	28
		5	19	54.29%	95

Q #	LD Question	Response	# Resp	% Resp	Value
		Total	35	100.00%	4.14
		Law department/company staff provide information on how the case was resolved in order to close a case	26	72.22%	
	(Rating)	1	3	11.54%	3
		2	4	15.38%	8
		3	7	26.92%	21
		4	5	19.23%	20
		5	7	26.92%	35
		Total	26	100.00%	3.35
		Outside counsel staff provide information on how the case was resolved in order to close a case	17	47.22%	
	(Rating)	1	6	35.29%	6
		2	2	11.76%	4
		3	5	29.41%	15
		4	1	5.88%	4
		5	3	17.65%	15
		Total	17	100.00%	2.59
		The system provides functionality to enter manual payments to be made to outside counsel	24	66.67%	
	(Rating)	1	3	12.50%	3
		2	1	4.17%	2
		3	4	16.67%	12
		4	8	33.33%	32
		5	8	33.33%	40
		Total	24	100.00%	3.71
		The system provides timekeeping functionality for outside counsel to record time and expenses on matters and then to generate invoices	24	66.67%	
	(Rating)	1	6	25.00%	6
		2	0	0.00%	0
		3	6	25.00%	18
		4	4	16.67%	16
		5	8	33.33%	40
		Total	24	100.00%	3.33
		The system provides functionality for staff/inside counsel to record time and expenses worked on matters and generate invoices	21	58.33%	
	(Rating)	1	8	38.10%	8
		2	0	0.00%	0
		3	4	19.05%	12
		4	3	14.29%	12
		5	6	28.57%	30
		Total	21	100.00%	2.95
		The system provides functionality to report accrual information on invoices that are pending and not yet paid	21	58.33%	

Q #	LD Question	Response	# Resp	% Resp	Value
	(Rating)	1	3	14.29%	3
		2	4	19.05%	8
		3	4	19.05%	12
		4	2	9.52%	8
		5	8	38.10%	40
		Total	21	100.00%	3.38
		The system provides functionality for law firms to provide accrual information for unbilled time at the law firm	19	52.78%	
	(Rating)	1	7	36.84%	7
		2	1	5.26%	2
		3	0	0.00%	0
		4	4	21.05%	16
		5	7	36.84%	35
		Total	19	100.00%	3.16
		Unknown	4	11.11%	
	(Rating)	1	3	75.00%	3
		2	0	0.00%	0
		3	1	25.00%	3
		4	0	0.00%	0
		5	0	0.00%	0
		Total	4	100.00%	1.50
27	How are new cases populated in the e-billing system? Select all that apply.	Cases are not maintained in our system	1	2.70%	
		They originate in our company's matter/claim/case/IP management system and are fed into the e-billing system	15	40.54%	
		They are entered in both the e-billing system and our company's matter/claim/case/IP management system by our staff	7	18.92%	
		They are entered only in the e-billing system by our company's staff	11	29.73%	
		They are entered by law firm staff	2	5.41%	
		They are created from law firm invoice submissions	1	2.70%	
		Unknown/I don't know	1	2.70%	
	(Other)	Billing & matter mgmt are one single application	1	2.70%	
		Combined e-billing/matter management system	1	2.70%	
		[System] has e-billing & matter management; entered by staff	1	2.70%	
		Total # of Respondents	37		
28	How do you determine which firm will receive a new case assignment? Select all that apply.	Our company's internal matter/claim/case/IP management provides guidance in making this choice	13	35.14%	
		Our staff chooses	29	78.38%	

Q #	LD Question	Response	# Resp	% Resp	Value
		The e-billing system identifies our preferred law firms	4	10.81%	
		The e-billing system identifies our approved law firms	5	13.51%	
		The e-billing system provides a list of firms who have been referred cases in the past	3	8.11%	
		The e-billing system provides a list of firms in the appropriate geographic location	4	10.81%	
		The e-billing system provides a list of firms who practice in the jurisdiction/venue	4	10.81%	
		The e-billing system provides a list of firms who have handled this type of case	5	13.51%	
		The e-billing system provides a list of attorney specialties or areas of expertise	3	8.11%	
		Based on an analysis of work performed the system recommends firm(s) to handle the case who have attained the best results in the past	3	8.11%	
		Unknown/I don't know	5	13.51%	
	(Other)	Reinsurance carrier chooses	1	2.70%	
		Total # of Respondents	37		
29	Is it necessary to edit or update case information in your e-billing system? Select only one.	Yes, and this is handled by our internal staff	14	38.89%	
		Yes, and this is handled by outside counsel staff	2	5.56%	
		Yes, and both outside counsel and internal staff edit or update case information	8	22.22%	
		No	10	27.78%	
		Unknown/I don't know	1	2.78%	
	(Other)	Yes, and it is done through automatic feed	1	2.78%	
		Total	36	100.00%	
30	Does the e-billing system provide functionality for your staff to subjectively rate the services provided by the law firm on a matter? Select only one.	Yes	16	43.24%	
		No	17	45.95%	
		Unknown/I don't know	4	10.81%	
		Total	37	100.00%	
31	Does the e-billing system require information on the resolution of a matter before it can be closed in the e-billing system? Select only one.	Yes, and this is handled by our internal staff	13	35.14%	
		Yes, and this is handled by outside counsel	0	0.00%	

Q #	LD Question	Response	# Resp	% Resp	Value
		Yes, and both outside counsel and internal staff edit or update resolution information	2	5.41%	
		No	16	43.24%	
		Unknown/I don't know	6	16.22%	
		Total	37	100.00%	
32	Does the system automatically close cases that have not been billed, identify cases that have not been billed and are pending closure, or provide an audit report of cases closed in this manner? Select only one..	Our system does not automatically close cases that have not been billed	8	21.62%	
		Yes	1	2.70%	
		No	24	64.86%	
		Unknown/I don't know	4	10.81%	
		Total	37	100.00%	
33	When are case management or other strategic plans for handling the matter required from outside counsel? Select all that apply.	We do not require case management or other strategic plans for handling the matter from outside counsel	5	13.51%	
		At the beginning of the case	12	32.43%	
		Based on a calendar interval and only once per year	2	5.41%	
		Based on a calendar interval and more than once per year	1	2.70%	
		Corresponds with usage of UTBMS or other codes required on time entries	1	2.70%	
		One or more times during the discovery phase	2	5.41%	
		One or more times during settlement discussions	3	8.11%	
		One or more times during trial preparation and trial phase	2	5.41%	
		One or more times during the appeal phase	3	8.11%	
		Unknown/I don't know	11	29.73%	
	(Other)	Can choose to require status reports monthly/quarterly	1	2.70%	
		Upon significant developments	1	2.70%	
		When we require status	1	2.70%	
		Total # of Respondents	37		
34	What is the frequency that case management or other strategic plans must be provided? Select only one.	Only once during the life of the matter	1	4.76%	
		At multiple points during the life of the matter	20	95.24%	
		Total	21	100.00%	
35	Who creates the case management or other strategic plan? Select only one.	Outside Counsel enters case plans into the system	3	15.79%	
		Outside Counsel provides a case plan file which is imported or entered into the system by our staff	5	26.32%	

Q #	LD Question	Response	# Resp	% Resp	Value
		Our company's staff creates the case plan	3	15.79%	
		Unknown/I don't know	3	15.79%	
	(Other)	Manual communication with OC	1	5.26%	
		Our staff works with outside counsel	1	5.26%	
		Outside counsel and internal staff	1	5.26%	
		Outside Counsel provides for matter mgmt system.	1	5.26%	
		Outside counsel provides plan, not in system	1	5.26%	
		Total	19	100.00%	
36	What type of budgeting do your departments or functional areas involved in electronic billing require? Select all that apply.	We do not require budgets on matters	10	27.03%	
		By Case and Timekeeper	7	18.92%	
		By Phase	12	32.43%	
		By Phase and Timekeeper	2	5.41%	
		By Activity	6	16.22%	
		By Activity and Timekeeper	1	2.70%	
		The system records budgets for each firm assigned to the matter and rolls these up to a combined budget for the entire matter	6	16.22%	
		Unknown/I don't know	3	8.11%	
	(Other)	By case and year	1	2.70%	
		By firm per matter monthly (per finance requirement)	1	2.70%	
		One department budgets by activity	1	2.70%	
		Updated annually by the responsible attorney	1	2.70%	
		We manually enter budgets for selected matters	1	2.70%	
		Total # of Respondents	37		
37	What is the frequency that budgets must be provided? Select only one.	Only once during the life of the matter	4	16.67%	
		At multiple points during the life of the matter	19	79.17%	
		Unknown/I don't know	1	4.17%	
		Total	24	100.00%	
38	Who creates the budget? Select only one.	Our company's staff creates the budget	6	25.00%	
		Outside Counsel enters Budgets into the system	7	29.17%	
		Outside Counsel provides a budget file which is imported or entered into the system by our staff	10	41.67%	
		Unknown/I don't know	1	4.17%	
		Total	24	100.00%	
39	Could an invoice be rejected if the budget is overdue, not yet approved or insufficient to include the amount of	Yes	14	58.33%	

Q #	LD Question	Response	# Resp	% Resp	Value
	the current invoice? Select only one.				
		No	8	33.33%	
		Unknown/I don't know	2	8.33%	
		Total	24	100.00%	
40	Are law firms required to include the purchase order number with the invoice submission? Select only one.	We do not use Purchase Order Numbers	25	67.57%	
		Yes, Purchase Order Numbers must be included in the invoice submission	3	8.11%	
		No, while we use Purchase Order Numbers, law firms do not need to include them in their invoice submissions	8	21.62%	
		Unknown/I don't know	1	2.70%	
		Total	37	100.00%	
41	Where do you store information on the type or nature of the Alternate Fee Arrangement (AFA) associated with a case? Select only one.	We do not use AFAs with outside counsel participating in electronic billing	9	24.32%	
		It is not stored; the type or nature of the AFA is identified only by the information in the invoice submission	3	8.11%	
		It is noted within the e-billing system	12	32.43%	
		It is stored in a manual system external to the e-billing system	5	13.51%	
		It is stored in an electronic system external to the e-billing system	3	8.11%	
		Unknown/I don't know	5	13.51%	
		Total	37	100.00%	
42	Do you require outside counsel to also provide information on the hours worked on your AFA cases? Select only one.	Yes	11	47.83%	
		No	9	39.13%	
		Unknown/I don't know	3	13.04%	
		Total	23	100.00%	
43	Why did you require law firms to provide coded time entries? Select all that apply.	We do not require coding of time and/or expense entries	4	10.81%	
		To facilitate electronic rules testing	24	64.86%	
		To facilitate case management processes	9	24.32%	
		To facilitate budgeting	10	27.03%	
		To analyze services provided on matter	25	67.57%	
		For rating law firm performance	8	21.62%	
		For other reporting purposes	14	37.84%	
		Unknown/I don't know	3	8.11%	
	(Other)	The system requires codes	1	2.70%	
		Total # of Respondents	37		
44	What type of coding do you require law firms to provide on their time and/or expense entries? Select all that apply.	Phase Codes	6	19.35%	

Q #	LD Question	Response	# Resp	% Resp	Value
		Task Codes	24	77.42%	
		Activity Codes	20	64.52%	
		Expense Codes	28	90.32%	
		Unknown/I don't know	1	3.23%	
		Other	0	0.00%	
		Total # of Respondents	31		
45	Which codes do you accept? Select all that apply.	Original UTBMS Litigation Code Set	22	68.75%	
		Original UTBMS Bankruptcy Code Set	13	40.63%	
		Original UTBMS Counseling Code Set	15	46.88%	
		Original UTBMS Project Code Set	16	50.00%	
		DRI's 2007 Revised UTBMS Litigation Code Set	1	3.13%	
		LOC's 2007 UTBMS Patent Code Set	7	21.88%	
		LOC's 2007 UTBMS Trademark Code Set	7	21.88%	
		LOC's 2007 Revised Project Code Set	3	9.38%	
		A customized code set based on one or more of the above	5	15.63%	
		A customized code set unrelated to any of the above	2	6.25%	
		Unknown/I don't know	6	18.75%	
		Total # of Respondents	32		
46	At what amount of expenditure do you require law firms to provide documentation of expenses submitted on their invoices? Select only one.	Documentation for expenses is not required	8	21.62%	
		Documentation is required for any third party expense, regardless of the amount	15	40.54%	
		Documentation is required for only certain categories of expenses, regardless of amount	2	5.41%	
		$50 - $99.99	2	5.41%	
		$100 - $249.99	2	5.41%	
		$250 - $499.99	1	2.70%	
		$500 or greater	2	5.41%	
		Unknown/I don't know	5	13.51%	
		Other	0	0.00%	
		Total	37	100.00%	
47	How do law firms provide this information? Select only one.	Copies are mailed by the law firms	5	20.83%	
		It is provided electronically as an e-mail attachment	3	12.50%	
		It is uploaded electronically into the e-billing system as supporting documentation to the invoice submitted	15	62.50%	
		It is added electronically to the matter using the system's document management functionality	1	4.17%	
		Other	0	0.00%	

Q #	LD Question	Response	# Resp	% Resp	Value
		Total	24	100.00%	
48	Some companies have a rule which states that time and expense items must be submitted within a certain amount of time in order to be paid. What is the period of time after which you will not pay time or expense entries submitted by law firms? Select only one.	We do not have this kind of rule	10	27.03%	
		Time and expenses must be submitted within 6 months	15	40.54%	
		6 months or greater but less than 9 months	4	10.81%	
		9 months or greater but less than 1 year	2	5.41%	
		1 year or greater but less than 2 years	3	8.11%	
		Unknown/I don't know	3	8.11%	
		Total	37	100.00%	
49	Who reviews invoices to identify errors and has the ability to reject the invoice? Select all that apply.	The e-billing system tests invoices electronically	23	62.16%	
		The Case Manager or responsible internal Attorney	27	72.97%	
		We have an internal Centralized Bill Review Team	10	27.03%	
		A Bill Review Specialist but not someone associated with a Centralized Bill Review Team	6	16.22%	
		External auditors under contract with our company review invoices	3	8.11%	
		Third party administrators used by our company can review invoices	1	2.70%	
		Multiple levels of invoice review may be or are required	17	45.95%	
		Unknown/I don't know	1	2.70%	
		Other	0	0.00%	
		Total # of Respondents	37		
50	What is the typical cycle time from receiving a bill to issuing payment? Select only one..	1 - 29 days	10	27.03%	
		30 - 59 days	18	48.65%	
		60 - 89 days	6	16.22%	
		90 - 119 days	3	8.11%	
		Total	37	100.00%	
51	What is the most common problem with rejected invoices? Select only one.	Billing for unapproved work or expenses	5	13.89%	
		Duplicate invoice submissions	4	11.11%	
		Invoice math issues	1	2.78%	
		Overcharging for work/excessive time charged	1	2.78%	
		Rates in excess of agreed to rate	2	5.56%	

Q #	LD Question	Response	# Resp	% Resp	Value
		Unapproved timekeepers	7	19.44%	
		Unknown/I don't know	6	16.67%	
	(Other)	Charged to the wrong matter number	1	2.78%	
		Charged to the wrong matter	3	8.33%	
		Discounts not provided on invoice	1	2.78%	
		Multiple matters on single invoice	1	2.78%	
		Not billing on a quarterly basis as required	1	2.78%	
		Violation of company billing guidelines	1	2.78%	
		Work performed by non-billable staff member	1	2.78%	
		Wrong entity of company being billed	1	2.78%	
		Total	36	100.00%	
52	If you analyze invoice rejections and share this information with firms participating in e-billing, how do you do this? Select all that apply.	We do not analyze invoice rejections	13	35.14%	
		We do not share analysis of invoice rejections with firms participating in e-billing	2	5.41%	
		The e-billing system provides law firms with information when an invoice is rejected	15	40.54%	
		The e-billing system provides law firms with analysis of aggregated invoice rejections for their firm only	0	0.00%	
		The e-billing system provides law firms with analysis of aggregated invoice rejections for all law firms but in a blind fashion	0	0.00%	
		It is provided or discussed during a meeting with the firm to review services provided	4	10.81%	
		Unknown/I don't know	3	8.11%	
		Other	0	0.00%	
		Total # of Respondents	37	100.00%	
53	How do you pay outside counsel participating in electronic billing? Select all that apply	Via check	28	75.68%	
		Via same day check	2	5.41%	
		Via EFT	13	35.14%	
		Via Wire Transfer	15	40.54%	
		Unknown/I don't know	2	5.41%	
		Other	0	0.00%	
		Total # of Respondents	37		
54	How are electronic payments made to outside counsel? Select only one.	We make a one payment transfer for all invoices paid that day	4	57.14%	
		We make separate payment transfers by invoice number	1	14.29%	
		Unknown/I don't know	2	28.57%	
		Other	0	0.00%	
		Total	7	100.00%	

Q #	LD Question	Response	# Resp	% Resp	Value
55	Have you instituted a mandatory minimum period that an invoice must remain in the system, or after approval of an invoice before the invoice can be paid, i.e. a and"float"? Select only one.	Yes	9	69.23%	
		No	1	7.69%	
		Unknown/I don't know	3	23.08%	
		Total	13	100.00%	
56	How frequently do you use the reports available in your e-billing system? Select only one.	Our e-billing system does not have reports available	2	5.41%	
		I use the reports all the time	13	35.14%	
		I use the reports often	9	24.32%	
		I use the reports once in awhile	5	13.51%	
		I seldom use the reports	5	13.51%	
		I have never used the reports in the e-billing system	1	2.70%	
		Unknown/I don't know	2	5.41%	
		Total	37	100.00%	
57	Rate the quality of the reports provided in your e-billing system? Select only one.	Excellent	8	25.00%	
		Very Good	9	28.13%	
		Good	7	21.88%	
		Fair	5	15.63%	
		Poor	3	9.38%	
		Total	32	100.00%	
58	Do you have the ability to customize parameters for system-provided reports, i.e., change selection criteria, sorting, grouping, etc.? Select only one.	Yes	27	87.10%	
		No	4	12.90%	
		Unknown/I don't know	0	0.00%	
		Total	31	100.00%	
59	Did the e-billing vendor create custom reports for your company in the e-billing system? Select only one.	Yes	11	34.38%	
		No	20	62.50%	
		Unknown/I don't know	1	3.13%	
		Total	32	100.00%	
60	Was there an additional charge to create the custom reports? Select only one.	Yes	4	36.36%	
		No	7	63.64%	
		Unknown/I don't know	0	0.00%	
		Total	11	100.00%	
61	A report cube a/k/a pivot table allows users to look at a two dimensional report, select an element in those two dimensions and click into it. The user then pivots into the selected data	Yes	8	25.00%	

Q #	LD Question	Response	# Resp	% Resp	Value
	element to see additional analysis for the single subset of data. Cubes allow the user to delve deeper into the data set and provide additional analysis at the discretion of the user. Does your e-billing system provide report cubes or pivot tables? Select only one.				
		No	19	59.38%	
		Unknown/I don't know	5	15.63%	
		Total	32	100.00%	
62	Did your e-billing vendor provide a report creation tool within the system interface or do you use an external add-on like Crystal Reports or SQL Report Writer to create reports? Select only one.	I do not have the ability to create reports in the e-billing system	6	16.22%	
		The report creation tool is part of the e-billing program	15	40.54%	
		We use an external program (like Crystal Reports) to create reports from the e-billing system data	12	32.43%	
		Unknown/I don't know	4	10.81%	
		Total	37	100.00%	
63	Rate the report creation tool that you use? Select only one.	Excellent	3	11.11%	
		Very Good	14	51.85%	
		Good	7	25.93%	
		Fair	2	7.41%	
		Poor	1	3.70%	
		Total	27	100.00%	
64	A dashboard is a screen that gives information on tasks that need to be handled, and could rate historic performance using the system and identify areas where the user's performance could be improved. Does the system supply dashboards to your internal users? Select all that apply.	To the extent that I use the e-billing system, it does not have dashboards	15	40.54%	
		Internal staff	20	54.05%	
		Outside counsel	7	18.92%	
		Unknown/I don't know	3	8.11%	
		Total # of Respondents	37		
65	What type of system dashboards are provided? Select all that apply.	Dashboards are general/non-role specific	4	21.05%	
		Dashboards are specific to the user or the users role in the system	13	68.42%	
		Unknown/I don't know	2	10.53%	
		Total # of Respondents	19		
66	What do the system dashboards contain? Select all that apply.	Information on tasks that need to be handled	14	73.68%	
		Information on the users historic performance in using the system	2	10.53%	

Q #	LD Question	Response	# Resp	% Resp	Value
		It identifies areas where the users performance in using the system could be improved	2	10.53%	
		Unknown/I don't know	2	10.53%	
	(Other)	Key performance indicators	1	5.26%	
		Total # of Respondents	19		
67	While dashboards are concerned with historic performance, a scorecard is a predictor of future performance and measures progress toward goals. Scorecards, if available in an e-billing system, are likely available only to management. [Note: The reference to scorecard here is not intended to mean a system whereby the user subjectively rates the performance of a law firm in handling matters.] Who created the scorecard measures in your e-billing system? Select only one.	To the extent that I use the e-billing system, it does not have scorecards	24	64.86%	
		The scorecards were predefined by the e-billing system	2	5.41%	
		Our management team created the scorecards	2	5.41%	
		Unknown/I don't know	9	24.32%	
		Other	0	0.00%	
		Total	37	100.00%	
68	If your company changes the scorecard measures, is this something that needs to be redeveloped for you by the e-billing vendor's development staff or is this something that you or a product specialist can configure and, therefore, does not require a developer to change? Select only one.	We are not able to change scorecard measures	1	25.00%	
		I/we/a product specialist from our staff can reconfigure scorecard measures	3	75.00%	
		Other	0	0.00%	
		Total	4	100.00%	
69	What is the cost of changing scorecard measures? Select only one.	We are not able to change scorecard measures	1	25.00%	
		Changing the scorecard measures would not cost extra	2	50.00%	
		Unknown/I don't know	1	25.00%	
		Total	4	100.00%	
70	How often does management meet to review scorecard information and discuss progress toward goals? Select only one.	At least quarterly	1	25.00%	
		A least once each year	2	50.00%	
		Never	1	25.00%	
		Total	4	100.00%	
71	Has your overall opinion changed on	It's too early to tell	2	5.41%	

Q #	LD Question	Response	# Resp	% Resp	Value
	the value of the electronic invoicing system being utilized by your company since it was first implemented? Select only one.				
		Significant value gained	19	51.35%	
		Some value gained	12	32.43%	
		No real difference from how we operated before implementing this system	2	5.41%	
		It was a mistake	1	2.70%	
		Unknown/I don't know	1	2.70%	
		Total	37	100.00%	
72	How has your e-billing system and implementation measured against your original expectations? Select only one.	It's too early to tell	1	2.70%	
		Exceeded expectations	9	24.32%	
		Met expectations	18	48.65%	
		Did not meet expectations	7	18.92%	
		Unknown/I don't know	2	5.41%	
		Total	37	100.00%	
73	Please rate your satisfaction with the following on a scale of 1 to 5 where 5 is excellent and 1 is Poor. Include rating for each item from 1 to 5, or N/A	The vendors corporate implementation services	35	94.59%	
	(Rating)	1	1	2.86%	1
		2	5	14.29%	10
		3	4	11.43%	12
		4	10	28.57%	40
		5	15	42.86%	75
		Total	35	100.00%	3.94
		The vendors training services	35	94.59%	
	(Rating)	1	1	2.86%	1
		2	3	8.57%	6
		3	8	22.86%	24
		4	14	40.00%	56
		5	9	25.71%	45
		Total	35	100.00%	3.77
		The vendors system manuals and documentation	35	94.59%	
	(Rating)	1	1	2.86%	1
		2	3	8.57%	6
		3	9	25.71%	27
		4	14	40.00%	56
		5	8	22.86%	40
		Total	35	100.00%	3.71
		The vendor overall	36	97.30%	
	(Rating)	1	2	5.56%	2
		2	2	5.56%	4
		3	6	16.67%	18
		4	13	36.11%	52

Q #	LD Question	Response	# Resp	% Resp	Value
		5	13	36.11%	65
		Total	36	100.00%	3.92
		The system speed	37	100.00%	
	(Rating)	1	2	5.41%	2
		2	3	8.11%	6
		3	10	27.03%	30
		4	6	16.22%	24
		5	16	43.24%	80
		Total	37	100.00%	3.84
		The system reliability	37	100.00%	
	(Rating)	1	2	5.41%	2
		2	3	8.11%	6
		3	5	13.51%	15
		4	12	32.43%	48
		5	15	40.54%	75
		Total	37	100.00%	3.95
		The system stability	37	100.00%	
	(Rating)	1	2	5.41%	2
		2	3	8.11%	6
		3	5	13.51%	15
		4	11	29.73%	44
		5	16	43.24%	80
		Total	37	100.00%	3.97
		The ease of use by corporate staff	36	97.30%	
	(Rating)	1	0	0.00%	0
		2	2	5.56%	4
		3	10	27.78%	30
		4	13	36.11%	52
		5	11	30.56%	55
		Total	36	100.00%	3.92
		Price	36	97.30%	
	(Rating)	1	2	5.56%	2
		2	0	0.00%	0
		3	11	30.56%	33
		4	11	30.56%	44
		5	12	33.33%	60
		Total	36	100.00%	3.86
		Ability of system to meet our needs	37	100.00%	
	(Rating)	1	3	8.11%	3
		2	2	5.41%	4
		3	10	27.03%	30
		4	10	27.03%	40
		5	12	32.43%	60
		Total	37	100.00%	3.70
74	What is your position as it relates to the e-billing system? Select only one.	As a member of management, I have oversight responsibilities in the program but do not really use the system day-to-day	2	5.41%	
		I am the e-billing project sponsor at my company	5	13.51%	

Q #	LD Question	Response	# Resp	% Resp	Value
		I am the e-billing system project manager at my company	11	29.73%	
		I have oversight responsibilities in the program and day-to-day responsibilities for using the e-billing system	7	18.92%	
		I help to administer the e-billing system at my company	8	21.62%	
		I have day-to-day responsibilities for using the e-billing system	1	2.70%	
	(Other)	Legal finance manager who assists with billing	1	2.70%	
		Legal IT Lead	1	2.70%	
		On team to replace the system	1	2.70%	
		Total	37	100.00%	
75	Indicate the nature of your business? Select only one.	Banking/Securities/Financial Services	5	13.51%	
		Computer/Electronic Manufacturing	2	5.41%	
		Consumer Products/Retail	5	13.51%	
		Health Care	2	5.41%	
		Insurance/Risk Management	6	16.22%	
		Manufacturing (other)	7	18.92%	
		Petroleum/Chemical Manufacturing	1	2.70%	
		Pharmaceutical	1	2.70%	
		Professional/Scientific/Technical Services	1	2.70%	
		Transportation	1	2.70%	
		Utilities	3	8.11%	
	(Other)	Printing	1	2.70%	
		Retail	1	2.70%	
		We engage in many industries	1	2.70%	
		Total	37	100.00%	
76	Indicate your worldwide company revenue during 2007? Select only one.	$500,000 or less	1	2.86%	
		$500,001 - $1,000,000	1	2.86%	
		$1,000,001 - $5,000,000	1	2.86%	
		$5,000,001 - $10,000,000	3	8.57%	
		$50,000,001 - $100,000,000	1	2.86%	
		More than $100,000,000	20	57.14%	
		Unknown/I don't know	8	22.86%	
		Total	35	100.00%	
77	Indicate your legal spend in 2007? Select only one.	$750,001 - $1,000,000	1	3.03%	
		$1,000,001 - $2,500,000	1	3.03%	
		$2,500,001 - $5,000,000	4	12.12%	
		$5,000,001 - $10,000,000	2	6.06%	
		More than $10,000,000	19	57.58%	
		Unknown/I don't know	6	18.18%	
		Total	33	100.00%	

Appendix 2
Law Firm Survey Questions and Responses

Q #	LF Question	Response	# Resp	% Resp
1	Please provide your e-mail address so that we can contact you if there are any questions with your response.		460	100%
		Total	460	100%
2	What is your position in the firm? Select only one.	Billing Manager/Clerk	258	56.95%
		Legal Assistant/Paralegal	25	5.52%
		Partner	21	4.64%
		Associate	1	0.22%
	(Other)	A/R Supervisor	1	0.22%
		Accounting	1	0.22%
		Accounting Administrative Assistant	1	0.22%
		Accounting Administrator	1	0.22%
		Accounting Manager	4	0.88%
		Accounting Operations Manager	1	0.22%
		Accounting System Admin.	1	0.22%
		Accounting Systems Manager	2	0.44%
		Administrator	4	0.88%
		Administrator	1	0.22%
		Applications Analyst	1	0.22%
		Assistant Billing Manager	1	0.22%
		Associate Director, IT	1	0.22%
		Attorney-Sole Practitioner	1	0.22%
		Billing Coordinator	2	0.44%
		Billing Department	1	0.22%
		Billing Manager	1	0.22%
		Billing Manager/Clerk	1	0.22%
		Billing Specialist	1	0.22%
		Billing Supervisor	1	0.22%
		Billing Team Leader	1	0.22%
		Billing/Collections Manager	1	0.22%
		Billing Manager/Clerk	1	0.22%
		Bookkeeper	1	0.22%
		Business Analyst	1	0.22%
		Business Manager	1	0.22%
		CFO	3	0.66%
		Chief of IT department	1	0.22%
		Chief Operating Officer	1	0.22%
		Client Accounting Controller	1	0.22%
		Client Accounting Manager	1	0.22%
		Client Accounting Supervisor	1	0.22%
		Client Relations Manager-in charge of billing	1	0.22%
		Comptroller	2	0.44%
		Computer Programmer	1	0.22%
		Controller	13	2.87%
		CTO	1	0.22%

Q #	LF Question	Response	# Resp	% Resp
		Database Administrator	1	0.22%
		Director of Finance	1	0.22%
		Director - Billing and Collection	1	0.22%
		Director of Accounting & Billing	1	0.22%
		Director of Administration	1	0.22%
		Director of Finance	4	0.88%
		Director of Financial Services	1	0.22%
		Director of Information technology	1	0.22%
		Director of IT	1	0.22%
		E-Billing Coordinator	7	1.55%
		E-Billing Specialist	3	0.66%
		e-billing team leader	1	0.22%
		Executive Assistant	1	0.22%
		Executive Director	1	0.22%
		Finance Manager	1	0.22%
		Finance Projects Manager	1	0.22%
		Financial Analyst	2	0.44%
		Financial Applications Administrator	1	0.22%
		Financial Applications Coordinator	1	0.22%
		Financial Applications Support Analyst	1	0.22%
		Financial System Administrator	1	0.22%
		Financial Systems Manager	2	0.44%
		Financial Systems Support Analyst	1	0.22%
		Firm Administrator	4	0.88%
		Firm Electronic Billing Coordinator	1	0.22%
		General Manager	1	0.22%
		Information Manager - Client Administration	1	0.22%
		Information Systems Manager	1	0.22%
		IT	2	0.44%
		IT Director	2	0.44%
		IT Manager	2	0.44%
		IT Professional	1	0.22%
		IT Coordinator	1	0.22%
		Legal Administrator	5	1.10%
		Legal Administrator/Controller	1	0.22%
		Legal Assistant	1	0.22%
		Legal Secretary	1	0.22%
		Manager	1	0.22%
		Network Administrator	1	0.22%
		Office Administrator	3	0.66%
		Office Manager	8	1.77%
		Office Manager / Paralegal	1	0.22%
		Officer	1	0.22%
		Operations Manager	1	0.22%
		Owner/Sole Practitioner	1	0.22%
		Project Manager	1	0.22%
		Regional Billing Manager	1	0.22%
		Secretary	1	0.22%

Q #	LF Question	Response	# Resp	% Resp
		Software Administration	1	0.22%
		Sole Proprietor	1	0.22%
		Supervisor, Accounts Receivable	1	0.22%
		Systems Admin	1	0.22%
		Systems Administrator	2	0.44%
		Team of Controller, Billing Supervisor and biller	1	0.22%
		Technology Software Specialist	1	0.22%
		Total	453	100.00%
3	Do you think it's reasonable for clients to expect your firm to pay to use an e-billing system? Select only one.	No	363	80.85%
		Yes	86	19.15%
		Total	449	100.00%
4	Why or why not?			
	(No. Why Not?)	Additional cost for the firm	2	0.64%
		Additional IT Costs, loss of control	1	0.32%
		Almost all benefits are for client	1	0.32%
		already costly given the amount of time it takes	1	0.32%
		Amount of use, and # of packages we use.	1	0.32%
		as the client you decided to e-bill	1	0.32%
		Available Matter ID is not provided in many cases	1	0.32%
		Because it is an additional cost and it wasn't our requirement	1	0.32%
		Because each client uses a different e-billing system	1	0.32%
		Because Clients are paid at a lesser price per hour	1	0.32%
		Because each client can select is own e-billing system	1	0.32%
		Because every client uses a different vendor	1	0.32%
		Because I did not choose it and it is more work	1	0.32%
		Because it diminishes our payment	1	0.32%
		Because it is a requirement from the client	1	0.32%
		Because it is the client's choice to use e-billing	1	0.32%
		Because it will increase our costs	1	0.32%
		Because the client is requiring	1	0.32%
		Because the client is the one REQUIRING me to use	1	0.32%
		Because the client won't accept paper copy	1	0.32%
		Because the decision to e-billing is client-driven.	1	0.32%
		Because the e-billing system does not assist us.	1	0.32%

Q #	LF Question	Response	# Resp	% Resp
		Because the software 'LEDES' is hard to use.	1	0.32%
		Because they are the ones requesting e-billing.	1	0.32%
		Because, we provide a service to our clients.	1	0.32%
		Because in most cases law firms are not given any	1	0.32%
		Benefit to the client, more work and expense to us	1	0.32%
		Benefits only client while extra work for firm	1	0.32%
		can be a difficult bill to pay	1	0.32%
		Client chooses system & receives greater benefit	1	0.32%
		client chooses to go electronic, they should pay	1	0.32%
		Client choosing the billing system; Costs Firm.	1	0.32%
		Client is receiving more benefit than firm	1	0.32%
		Client is the one that wants the service, not firm	1	0.32%
		Client receives the benefit, not the law firm	1	0.32%
		client request - expense should be paid by client	1	0.32%
		Client requested	1	0.32%
		Client requirement -- client pays	1	0.32%
		client requirements = they should pay for it	1	0.32%
		Client responsibility if e-billing required.	1	0.32%
		Client should pay	1	0.32%
		Clients already get discounted rates for services	1	0.32%
		Clients are the true beneficiaries of e-billing	1	0.32%
		Client's choice	1	0.32%
		Client's choice - client pays.	1	0.32%
		Client's decision to use the system, so should pay.	1	0.32%
		Clients make the decision to e-bill.	1	0.32%
		Clients mandate it, they should pay for it	1	0.32%
		Clients receiving reduced rates; won't pay otherwise	1	0.32%
		clients request	2	0.64%
		clients requesting e-billing should absorb the cost	1	0.32%
		Clients with 1 or 2 matters should take paper	1	0.32%

Q #	LF Question	Response	# Resp	% Resp
		Cost outweighs benefit to us	1	0.32%
		cost should be absorbed if their choice	1	0.32%
		Cost should be borne by client if want billing sys	1	0.32%
		Cost should be borne by the client	1	0.32%
		costs	1	0.32%
		Costs firm more to process e-bills/clients request	1	0.32%
		Costs for the firm	1	0.32%
		Costs get billed back to client	1	0.32%
		Costs us for privilege of billing for work done	1	0.32%
		Depends on detail of invoices, dollar amount, other	1	0.32%
		dilutes profits, client may expect fee reduction	1	0.32%
		don't believe you should have to pay to bill	1	0.32%
		Due to the client requiring us to use it	1	0.32%
		E-Billing is time consuming - let alone paying	1	0.32%
		each system has to learned and mastered.	1	0.32%
		E-Billing takes more time to do = extra cost to firm	1	0.32%
		E-Billing benefits clients not the law firms	1	0.32%
		E-Billing benefits the client	1	0.32%
		E-Billing is additional overhead for the law firm	1	0.32%
		E-Billing is convenient for the client, not us	1	0.32%
		E-Billing is more work for us, not less work	1	0.32%
		E-Billing is not beneficial to law firms	1	0.32%
		E-Billing is the client's choice, not the firm's	1	0.32%
		e-billing primarily benefits the client	1	0.32%
		E-Billing service is more beneficial to client	1	0.32%
		E-Billing system is client overhead	1	0.32%
		E-Billing systems are built for the clients benefit	1	0.32%
		E-Billing systems are for the client's convenience	1	0.32%
		E-Billing systems are of no benefit to law firms	1	0.32%
		E-Bills sent per their request. S/B their expense	1	0.32%
		Expense	1	0.32%
		Fees are reduced considerably for "overhead" as is	1	0.32%

Q #	LF Question	Response	# Resp	% Resp
		Firms are forced to e-bill by their clients	1	0.32%
		Firms have to bare the expense of setup costs	1	0.32%
		Have to maintain their system - have our own	1	0.32%
		Higher staff and processing costs, pmt still slow	1	0.32%
		I do see where I derive value from using a 3rd	1	0.32%
		I don't know of any other industry that has to pay	1	0.32%
		I see that as an operating cost to the client	1	0.32%
		I think it's their cost of doing business	1	0.32%
		I think the clients should be responsible	1	0.32%
		I think this is a cost of them doing business	1	0.32%
		I work with 6 vendors that do not charge us a fee	1	0.32%
		if client requires it then they should pay	1	0.32%
		if client's request, should be covered by client	1	0.32%
		If done properly, more efficient	1	0.32%
		If it is mandatory it should be paid by the beneficiary	3	0.96%
		if mandated, client should bear cost	1	0.32%
		if paper billed, cost would be minimum	1	0.32%
		If the client requires it, then they should pay	1	0.32%
		if they get the benefit, they should pay	1	0.32%
		If they require a specific system, they should pay	1	0.32%
		If they require it, they should make it available	1	0.32%
		If they require it, they should pay for it	2	0.64%
		If they want a e-bill system then they should pay	1	0.32%
		If they want the convenience, they should pay	1	0.32%
		If they require, they should bear the cost	1	0.32%
		If they want e-billing they should be responsible	1	0.32%
		if they want us to use it, I think they should pay	1	0.32%
		If this is their rule it should be at their cost	1	0.32%
		invoices are not getting paid any faster	1	0.32%
		It already costs enough man hours to set up	1	0.32%
		It cuts from our profits. Client's	1	0.32%

Q #	LF Question	Response	# Resp	% Resp
		deccision - they pay		
		it discounts our time even more then most do already	1	0.32%
		It does not add value to the firm's business	1	0.32%
		It is "their" accounting/management system	1	0.32%
		It is a client choice, not a law firm choice	1	0.32%
		It is a convenience for the customer	1	0.32%
		It is a cost of doing business for clients	1	0.32%
		It is a cost of doing business for the Insurance Company	1	0.32%
		It is done at their request, not ours	1	0.32%
		It is effectively a discount taken on bills	1	0.32%
		it is excessive and should be a shared expense	1	0.32%
		It is making their accounting easier and not ours	1	0.32%
		It is merely another cost to e-billing	1	0.32%
		it is more a client service, not enough room for com	1	0.32%
		It is more work for us, plus we have to pay for it	1	0.32%
		It is not our choice to e-bill our client	1	0.32%
		It is the client's choice to bill electronically	1	0.32%
		It is the clients choice, so they should absorb cost	1	0.32%
		It is their choice to bill electronically	1	0.32%
		It is their choice to receive invoices this way	1	0.32%
		It is their choice to use an e-billing system	1	0.32%
		It is their initiative and the cost should be theirs	1	0.32%
		It is their option to use this service, not ours	1	0.32%
		It is their requirement to use	1	0.32%
		It is their system they should pay for it	1	0.32%
		It is to the benefit of the client !	1	0.32%
		It is used by the client to track their billing	1	0.32%
		It is usually a surprise, unscheduled expense	1	0.32%
		It makes no sense	1	0.32%
		It requires clients to go outside the billing norm	1	0.32%
		It should be client's responsibility	1	0.32%
		It should be pro-rated or based upon the case load	1	0.32%
		It takes longer to implement	1	0.32%

Q #	LF Question	Response	# Resp	% Resp
		It was the client's choice, not ours	1	0.32%
		It would only be fair if there was mutual benefit	1	0.32%
		It's more time intensive	1	0.32%
		It's a Client Requirement	1	0.32%
		It's a service designed to save them costs	1	0.32%
		It's a service that the client chooses to use	1	0.32%
		It's already costing us time and resources	1	0.32%
		Its at client's request	1	0.32%
		It's burdensome and then have to pay for it	1	0.32%
		It's for their convenience	2	0.64%
		It's more work for us for no benefit	1	0.32%
		It's not our decision to use the system	1	0.32%
		It's not usual to have to pay to collect our fees	1	0.32%
		It's something the client wants not the firm	1	0.32%
		It's the clients choice not ours	1	0.32%
		It's the client's initiative, so we should not pay	1	0.32%
		It's their choice to use system; they should pay	1	0.32%
		It's their choice to use the system	1	0.32%
		It's too expensive, much more than a stamp!	1	0.32%
		Its extremely time consuming for us and their choice	1	0.32%
		lack of resources	1	0.32%
		Law firm is providing a service & should get paid	1	0.32%
		Law firm should not shoulder costs from e-billing	1	0.32%
		Law Firms are not given a choice of the Vendor	1	0.32%
		Law Firms receive little to no benefit	1	0.32%
		Law firms should not have to pay for billing them	1	0.32%
		Makes no sense that you get charged for billing	1	0.32%
		moot question - cost of doing business	1	0.32%
		Much more cost eff. for us to send paper	1	0.32%
		Multiple Clients/systems, not MY choice	1	0.32%
		No added benefit to our firm for using the system	1	0.32%
		No advantages to the Firm to justify the charge	1	0.32%

Q #	LF Question	Response	# Resp	% Resp
		No Benefit	1	0.32%
		No benefit for us, especially on pmts of bills	1	0.32%
		no benefit to law firm; lots of extra work	1	0.32%
		No benefit to our firm	1	0.32%
		No the client should pay if required	1	0.32%
		Not all clients us the same system	1	0.32%
		Not choice of firm to use system	1	0.32%
		Not enough interest at this point	1	0.32%
		Not enough room here to give my answer	1	0.32%
		not our choice to use e-billing systems	1	0.32%
		Once a service is provided, shouldn't have to pay	1	0.32%
		Our client usually chooses the e-billing system	1	0.32%
		Our clients (not us) require us to e-bill	1	0.32%
		Paying to bill a client for services is backwards	1	0.32%
		Per the client's request, the client's expense	1	0.32%
		Process may benefit them, not benefit to us	1	0.32%
		Prompt pay discount; not flat fee	1	0.32%
		Raises overhead transferring costs to other clients	1	0.32%
		Reduced rates and other reductions	1	0.32%
		Sharing costs evenly would be more fair	1	0.32%
		Should be client's responsibility	1	0.32%
		Should depend client's need	1	0.32%
		Should not be our responsibility	1	0.32%
		Small number of matters	1	0.32%
		Some cost more than we bill them. Free Alternative	1	0.32%
		Takes more time and additional hardware to do	1	0.32%
		That cost must be recuperated; thereby increasing	1	0.32%
		That is their administrative cost not ours	1	0.32%
		The administrative time burden far exceeds the $	1	0.32%
		the advantage is to their process	1	0.32%
		The advantages to e-billing are to the client	1	0.32%
		The associated costs should be taken by the client	1	0.32%
		The Client chooses to use electronic billing	1	0.32%
		The client has chosen to use the e-	1	0.32%

Q #	LF Question	Response	# Resp	% Resp
		billing system		
		The client has contracted with the e-billing vendor	1	0.32%
		The client owes us money and you want us to pay?	1	0.32%
		The client should pay	1	0.32%
		The client should pay if they want e-billing	1	0.32%
		The client should pay the expense of this service	1	0.32%
		The client's should incur the cost	1	0.32%
		The cost exceeds the billing in some cases	1	0.32%
		The cost should be absorbed by client	1	0.32%
		The expense is not reimbursed	1	0.32%
		The fee for the e-billing service is too high	1	0.32%
		The fee is significant	1	0.32%
		The function is meant to make the clients job easy	1	0.32%
		The Law Firm did not request the service	1	0.32%
		The options is theirs	1	0.32%
		The process does not benefit the law firm	1	0.32%
		The reasonableness of administrative costs spent	1	0.32%
		The service is for client, not law firm	1	0.32%
		The system is for their use	1	0.32%
		The systems benefit the client more, reporting etc.	1	0.32%
		The website is for the clients benefit not the firm	1	0.32%
		Their choice to use e-bill they pick-up cost	1	0.32%
		Their choice, their expense	1	0.32%
		There are so many free e-billing sites out there	1	0.32%
		There is little advantage for us	1	0.32%
		There is no benefit to the law firm	1	0.32%
		There is not enough space to voice opinion!	1	0.32%
		There should be an exemption for small firms	1	0.32%
		There's no benefit to the law firm for e-billing	1	0.32%
		These clients also expect reduced rates	1	0.32%
		These clients require us to reduce our rates	1	0.32%
		These systems primarily benefit clients	1	0.32%
		They are benefitting, not us	1	0.32%
		They are streamlining their process not	1	0.32%

Q #	LF Question	Response	# Resp	% Resp
		ours		
		They are the clients of the e-billing system	1	0.32%
		They are the ones requesting the service	1	0.32%
		They are the ones that benefit from it not us!	1	0.32%
		They are the ones that require it	1	0.32%
		They choose it, they should pay for it	1	0.32%
		They choose to make us use it, we have no choice	1	0.32%
		They engaged us, why do we pay?	1	0.32%
		They force us to use it, they should pay the costs	1	0.32%
		They get processing fees and should pay the svc.	1	0.32%
		They should not charge us to bill THEM....	1	0.32%
		They should pay for systems they elect to use.	1	0.32%
		They're asking us to use the system of their choice	1	0.32%
		They're forcing us to use the systems	1	0.32%
		They're the beneficiaries, not us	1	0.32%
		This cost should be covered by the client	1	0.32%
		This is a service chosen by the client	1	0.32%
		This is for the client's convenience, not ours	1	0.32%
		this is the client choice to go electronic billing	1	0.32%
		This is the client's choice. We have other costs	1	0.32%
		This is the ONLY client that charges us for billing	1	0.32%
		This is the system that they chose to pay through	1	0.32%
		This should be a client overhead cost	1	0.32%
		This should be considered overhead by the client	1	0.32%
		This should be covered by client vendor contract	1	0.32%
		This software is part of doing business	1	0.32%
		To maintain profit we must raise the rates	1	0.32%
		Too high %age of income received from 1 client	1	0.32%
		Too many e-billing systems for efficiency	1	0.32%
		Unfair. Firm has no choice.	1	0.32%
		Unnecessary	1	0.32%
		Unnecessary expense for firms to	1	0.32%

Q #	LF Question	Response	# Resp	% Resp
		submit invoices		
		vendors should not be expected to pay	1	0.32%
		We already have an accounting system	1	0.32%
		We are not the one requesting use of the system	1	0.32%
		We are paying for the "privilege" to bill them	1	0.32%
		We are providing requested service to a client	1	0.32%
		We are saving them significant man hours	1	0.32%
		We could e-mail for less money	1	0.32%
		We did not ask for their services	1	0.32%
		We did not make the request with the e-billing vendor	1	0.32%
		We do not charge our clients for billing system	1	0.32%
		We don't always do enough business to warrant it	1	0.32%
		We don't have the option of not using e-billing	1	0.32%
		We have no choice in the matter	1	0.32%
		We have no choice in the matter	1	0.32%
		We pay them, but do not consider it reasonable	1	0.32%
		We should be able to exchange files directly	1	0.32%
		We should be paid in full for our services	1	0.32%
		we should not have to pay them to get them to pay	1	0.32%
		We should not have to pay to be paid	1	0.32%
		We shouldn't have to pay to meet needs of client	1	0.32%
		We use a variety of e-billing systems at no charge	1	0.32%
		We were told we had to use the system	1	0.32%
		When it is for their convenience	1	0.32%
		Whoever benefits should pay	1	0.32%
		Why should I bill for the right to bill my client?	1	0.32%
		Why should I pay to submit a bill?	1	0.32%
		Why should we pay for a convenience for you?	1	0.32%
		Why should we pay for your auditing?	1	0.32%
		You got to be kidding right?	1	0.32%
		Your are doing them a service, why pay	1	0.32%
		(No. Why not?) Total	313	100.00%
	(Yes. Why?)	Appropriate to pass on costs to dedicated counsel	1	1.64%
		Assume cost of using system is reasonable & proportional	1	1.64%

Q #	LF Question	Response	# Resp	% Resp
		Best and faster service	1	1.64%
		Can speed the payment process up.	1	1.64%
		Clients requested it	1	1.64%
		Common form of many transactions	1	1.64%
		Convenience	1	1.64%
		Cost of doing business	2	3.28%
		Costs associated with e-billing	1	1.64%
		Ease of transactions	1	1.64%
		Easier for everyone; saves paper/postage	1	1.64%
		Easier for them to manage	1	1.64%
		E-Billing benefits both the client and law firm	1	1.64%
		E-Billing improves payment	1	1.64%
		Efficiency is gained when done properly	1	1.64%
		Expedites and streamlines the bill pay process	1	1.64%
		Facilitates invoice submission/processing	1	1.64%
		Faster	1	1.64%
		Faster and more efficient	1	1.64%
		Firm provided service	1	1.64%
		Greener, faster, more accurate	1	1.64%
		I think it's reasonable because it's overhead	1	1.64%
		If costs are within reason given the amount of bill	1	1.64%
		If e-billing actually reduces payment times	1	1.64%
		If it helps money come in the door faster great	1	1.64%
		if results are faster, efficiently, less overhead	1	1.64%
		If that is how a client wants the bill	1	1.64%
		if there is a guarantee of turnaround of payment	1	1.64%
		It expedites the process of getting bills paid	1	1.64%
		it is a businesses that we r using	1	1.64%
		it is an advantage in competition	1	1.64%
		It makes sense to move towards automating processes	1	1.64%
		It saves on trees and it is easier to submit	1	1.64%
		It's for their advantage, or their requirement	1	1.64%
		Keeping up with technology & provide service	1	1.64%
		Less chance of error; paper reduction	1	1.64%
		Less margin of error	1	1.64%

Q #	LF Question	Response	# Resp	% Resp
		Less room for error, faster processing and payment	1	1.64%
		Makes accts payable more streamline, faster pay	1	1.64%
		Makes good business sense for them	1	1.64%
		More efficient	1	1.64%
		Only when client/payment turnaround is quick	1	1.64%
		Paperless billing is inevitable	1	1.64%
		Reduced Personnel/Postage Costs	1	1.64%
		Reliability, all invoices matter documented	1	1.64%
		Requested by major client	1	1.64%
		Saves money, less work for the billing dept	1	1.64%
		Saves time, energy and paper	1	1.64%
		Service to the client	1	1.64%
		Should be based on invoice quantity	1	1.64%
		Should be same cost as paper	1	1.64%
		Simplification	1	1.64%
		The firm gets paid faster	1	1.64%
		They are the customer	1	1.64%
		This e-billing system works well	1	1.64%
		Unknown	1	1.64%
		We do what they like	1	1.64%
		We need to bill them as they wish	1	1.64%
		We want to keep their business	1	1.64%
		Yes, but the fees we have to pay are outrageous!	1	1.64%
		(Yes. Why?) Total	61	100.00%
5	Does your firm have at least one dedicated, full-time person responsible for e-billing? Select only one.	Yes	248	54.75%
		No	202	44.59%
		Unknown/I don't know	3	0.66%
		Total	453	100.00%
6	Has your firm outsourced the e-billing function or obtained a middle-ware system to administer e-billing for your firm? Select only one.	Yes	50	10.94%
		No	393	86.00%
		Unknown/I don't know	14	3.06%
		Total	457	100.00%
7	What percentage of your firm's overall client base has requested your firm to e-bill? Select only one.	Less than 10%	183	40.13%
		10% or more but less than 20%	62	13.60%
		20% or more but less than 30%	60	13.16%
		30% or more but less than 40%	39	8.55%
		40% or more but less than 50%	27	5.92%
		50% or more but less than 60%	22	4.82%

Q #	LF Question	Response	# Resp	% Resp
		60% or more but less than 70%	7	1.54%
		70% or more but less than 80%	6	1.32%
		80% or more but less than 90%	5	1.10%
		90% or more	2	0.44%
		Unknown/I don't know	43	9.43%
		Total	456	100.00%
8	What percentage of your firm's overall revenue does this represent? Select only one.	Less than 10%	104	23.01%
		10% or more but less than 20%	65	14.38%
		20% or more but less than 30%	58	12.83%
		30% or more but less than 40%	45	9.96%
		40% or more but less than 50%	22	4.87%
		50% or more but less than 60%	23	5.09%
		60% or more but less than 70%	17	3.76%
		70% or more but less than 80%	10	2.21%
		80% or more but less than 90%	8	1.77%
		90% or more	2	0.44%
		Unknown/I don't know	98	21.68%
		Total	452	100.00%
9	How many different vendor e-billing systems or client-created systems does your firm use today? Note: If 5 clients use the same vendor system, this would count as only 1 system for this response.	0	5	1.13%
		1	46	10.38%
		2	44	9.93%
		3	39	8.80%
		4	33	7.45%
		4-5	2	0.45%
		4+	1	0.23%
		5	41	9.26%
		5-10	1	0.23%
		5+	2	0.45%
		Several	1	0.23%
		6	36	8.13%
		6-7	1	0.23%
		6+	1	0.23%
		7	18	4.06%
		8	19	4.29%
		8-10	1	0.23%
		9	11	2.48%
		10	32	7.22%
		10-15	1	0.23%
		10+	2	0.45%
		11	8	1.81%
		12	15	3.39%
		12-15	2	0.45%
		13	6	1.35%
		14	13	2.93%

Q #	LF Question	Response	# Resp	% Resp
		14-18	1	0.23%
		15	15	3.39%
		16	6	1.35%
		17	6	1.35%
		18	2	0.45%
		19	3	0.68%
		20	6	1.35%
		20+	2	0.45%
		21	5	1.13%
		22	5	1.13%
		23	1	0.23%
		25	2	0.45%
		25+	2	0.45%
		26	2	0.45%
		27	1	0.23%
		30	1	0.23%
		33	1	0.23%
		38	1	0.23%
		Total	443	100.00%
10	Select a system/vendor name to report on. Select only one.	(The) Advocator System by Legal Solutions Group	15	2.37%
		Advanced Invoice Management System (AIMS) or ShareDocs/Legal by DataCert	177	27.96%
		Anaqua	1	0.16%
		Ariba	3	0.47%
		Bridgeway Solutions Product Suite or Corridor by Bridgeway Software	7	1.11%
		Claim Intelligence	1	0.16%
		Corprasoft Legal Desktop, Chief Legal Officer or Corprasoft Legal Business Intelligence By DataCert, formerly Corprasoft	1	0.16%
		Counsel Link, Share Doc and TyMetrix	1	0.16%
		CounselLink, Examen or Legal Precision by LexisNexis Examen	59	9.32%
		Direct Invoice by Direct Commerce	1	0.16%
		DirectInvoice or Smart Counsel by CT TyMetrix, formerly Tripoint	10	1.58%
		Eliot (CSC)	2	0.32%
		Expense Performance Management Suite by Allegient Systems	23	3.63%
		iClear by First American	2	0.32%
		Lawtrac by LT Online Corporation	2	0.32%
		LEDES	1	0.16%
		Legal eXchange by Bottomline Technologies	69	10.90%
		Legal Solutions Suite by CSC formerly Litigation Advisor formerly Law Audit Services	2	0.32%
		Litigation Advisor by Computer	23	3.63%

Q #	LF Question	Response	# Resp	% Resp
		Sciences Corporation, formerly Legalgard		
		LPS Desktop Invoice Management/New Invoice	1	0.16%
		OB10	2	0.32%
		Our firm does not e-bill	10	1.58%
		PACE by Navigant Consulting, formerly Peterson Consulting	2	0.32%
		ProLaw by Thomson Elite	2	0.32%
		Proprietary system developed by client	12	1.90%
		Request for paper billing with an electronic component	1	0.16%
		Serengeti Tracker by Serengeti Law	94	14.85%
		TeamConnect or Collaborati by Mitratech Software	2	0.32%
		TrialNet Matter Management & E-Billing by TrialNet, formerly Peerpoint	4	0.63%
		TyMetrix 360 or TyMetrix Legacy Systems (not T360) by CT TyMetrix	88	13.90%
		ValidZone	2	0.32%
		Visibillity by Bottomline Technologies, formerly Visibillity	10	1.58%
		We use several, as requested by clients.	1	0.16%
		XIGN by JP Morgan Chase	2	0.32%
		Total	633	100.00%
11	Please specify the client-developed proprietary system:	(no response)		
		Total	0	
12	Was your firm involved in your client's decision to use this system? Select only one.	No	573	92.72%
		Unknown/I don't know	28	4.53%
		Yes	17	2.75%
		Total	618	100.00%
13	What tasks needed to be performed to set up the system when the client first went live? Check all that apply	Provide information to client on matters assigned to firm to assist client in setting up the system	381	61.55%
		Install new software	119	19.22%
		Install new hardware	10	1.62%
		Purchase new modules for your time and billing software to output file required	98	15.83%
		Add information on firm and locations	338	54.60%
		Provide banking information for electronic payment	220	35.54%
		Add firm users to allow access to e-billing system	417	67.37%
		Add client number reference(s) to identify client, its subsidiaries and affiliates billed through system	375	60.58%
		Enter timekeepers	430	69.47%
		Enter timekeeper rates	398	64.30%

Q #	LF Question	Response	# Resp	% Resp
		Add matters to system (system requires law firm to handle this task)	178	28.76%
		Enter fields of case information into system	155	25.04%
		Identify timekeepers working on matters	285	46.04%
		Provide case management plans on matters	57	9.21%
		Enter budgets on matters	166	26.82%
		Training (admin and/or usage)	348	56.22%
		Perform test submission with vendor/resolve issues	314	50.73%
		Unknown/I don't know	31	5.01%
	(Other)	Add matter and client IDs to UDFs in Elite	1	0.16%
		Add task codes to time and billing system	1	0.16%
		Bespoke rewrite of billing module	1	0.16%
		Bespoke rewrite of billing module	1	0.16%
		Converted from [system1] to [system2]	1	0.16%
		Create e-billing template-LEDES format	1	0.16%
		Create new formats for upload	1	0.16%
		Create our own secure web pg to upload cXML files	1	0.16%
		Create the bill format required into our system	1	0.16%
		Custom interface to change our billing format	1	0.16%
		Design LEDES98 Output, system did not have this	1	0.16%
		Don't remember everything required	1	0.16%
		Don't remember most of this, so long ago	1	0.16%
		Download certificate	1	0.16%
		Download install certificate etc.	1	0.16%
		Excel schedule re timekeeper & firm information	1	0.16%
		Format e-invoice to allow for all information required	1	0.16%
		Had some software modification.	1	0.16%
		had to hound client and system for flat fee solution	1	0.16%
		Info is from conversations with billers	1	0.16%
		It was so long ago, I don't recall	1	0.16%
		I've never been able to make this system work right	1	0.16%
		Learning system was not easy	1	0.16%
		Majority of clients require timekeeper rate approval	1	0.16%
		Manually entering LEDES, software output incorrect	1	0.16%
		Nothing out of the ordinary	1	0.16%

Q #	LF Question	Response	# Resp	% Resp
		Notify insurance co of matters not in system	1	0.16%
		Pay money to [vendor]	1	0.16%
		pay time and billing vendor develop invoice template	1	0.16%
		Provide client with timekeeper rates and information	1	0.16%
		Provide fee structures for client approval	1	0.16%
		Provide Matter/Timekeeper spreadsheets	1	0.16%
		Provide spreadsheet with timekeepers & rates	1	0.16%
		Reconcile matters	1	0.16%
		ShareDocs has a excellent program	1	0.16%
		Some require budgets and some do not	2	0.32%
		Supply timekeeper information to client	1	0.16%
		They set up account for us.	1	0.16%
		Too many	1	0.16%
		Validate firm active matters to system	1	0.16%
		Total # of Respondents	619	
14	How many hours did it take to set up the client on this system? Select only one.	Less than 5 hours	228	36.95%
		5 hours or more but less than 10 hours	132	21.39%
		10 hours or more but less than 15 hours	65	10.53%
		15 hours or more but less than 20 hours	32	5.19%
		20 hours or more but less than 30 hours	23	3.73%
		30 hours or more but less than 40 hours	18	2.92%
		40 hours or more but less than 50 hours	9	1.46%
		50 hours or more but less than 75 hours	6	0.97%
		75 hours or more but less than 100 hours	5	0.81%
		100 hours or more	8	1.30%
		Unknown/I don't know	91	14.75%
		Total	617	100.00%
15	Considering the tasks identified in the answer to the second question immediately above, on average how many hours does it take each month to maintain the system for this client? Select only one.	Less than 5 hours	443	71.80%
		5 hours or more but less than 10 hours	95	15.40%
		10 hours or more but less than 15	23	3.73%

Q #	LF Question	Response	# Resp	% Resp
		hours		
		15 hours or more but less than 20 hours	14	2.27%
		20 hours or more but less than 30 hours	6	0.97%
		30 hours or more but less than 40 hours	6	0.97%
		40 hours or more but less than 50 hours	2	0.32%
		50 hours or more but less than 75 hours	1	0.16%
		100 hours or more	1	0.16%
		Unknown/I don't know	26	4.21%
		Total	617	100.00%
16	How many active matters do you have for this client? Select only one.	Less than 10	160	25.85%
		10 or more but less than 20	86	13.89%
		20 or more but less than 30	66	10.66%
		30 or more but less than 50	63	10.18%
		50 or more but less than 75	41	6.62%
		75 or more but less than 100	34	5.49%
		100 or more but less than 150	28	4.52%
		150 or more but less than 200	27	4.36%
		200 more but less than 300	19	3.07%
		300 more but less than 500	28	4.52%
		500 or more	44	7.11%
		Unknown/I don't know	23	3.72%
		Total	619	100.00%
17	What tasks must you perform to submit bills through the system for this client? Check all that apply	Specialized/manual formatting of your invoices (not in conformance with LEDES standards)	202	33.11%
		Include UTBMS Expense Codes	469	76.89%
		Include UTBMS Task & Activity Codes	473	77.54%
		Upload and submit invoice file through system	564	92.46%
		Enter information on the invoice, matter or file type as part of upload process	179	29.34%
		E-Mail invoice file	49	8.03%
		Deliver invoice file through automated process scripted by your firm to FTP/SFTP site	59	9.67%
		Multiple invoices per invoice file can be provided to this system	115	18.85%
		Provide paper or electronic copy of expenses on invoice	152	24.92%
		Provide paper or electronic copy of invoice	71	11.64%
		Provide other information as required by client	167	27.38%
		The system provides functionality for me to correct certain errors on-line	171	28.03%

Q #	LF Question	Response	# Resp	% Resp
		Check system to see if invoices submitted successfully	370	60.66%
		Check e-mail to see if invoices submitted successfully	344	56.39%
		Respond to submission problems	439	71.97%
		Respond to client's rule violations	347	56.89%
		Unknown/I don't know	6	0.98%
	(Other)	File out their form	1	0.16%
		Manually adjust LEDES bill to work in their system	1	0.16%
		Never able to make it work, conflicting info from	1	0.16%
		Prepare in LEDES format	2	0.33%
		Produce PDF files.	1	0.16%
		Too many	1	0.16%
		Total # of Respondents	610	
18	On average, how many invoices do you submit through the system each month for this client? Select only one.	Less than 10	195	31.40%
		10 or more but less than 20	102	16.43%
		20 or more but less than 30	89	14.33%
		30 or more but less than 50	57	9.18%
		50 or more but less than 75	40	6.44%
		75 or more but less than 100	28	4.51%
		100 or more but less than 150	26	4.19%
		150 or more but less than 200	20	3.22%
		200 or more but less than 300	18	2.90%
		300 or more but less than 500	10	1.61%
		500 or more	17	2.74%
		Unknown/I don't know	19	3.06%
		Total	621	100.00%
19	On average, how many hours does it take each month to submit bills through the system for this client, including resolving problems? Select only one.	Less than 5 hours	350	57.00%
		5 hours or more but less than 10 hours	127	20.68%
		10 hours or more but less than 15 hours	58	9.45%
		15 hours or more but less than 20 hours	31	5.05%
		20 hours or more but less than 30 hours	15	2.44%
		30 hours or more but less than 40 hours	10	1.63%
		40 hours or more but less than 50 hours	2	0.33%
		50 hours or more but less than 75 hours	4	0.65%
		75 hours or more but less than 100 hours	2	0.33%

Q #	LF Question	Response	# Resp	% Resp
		100 hours or more	1	0.16%
		Unknown/I don't know	14	2.28%
		Total	614	100.00%
20	On average, how many hours does it take from the time you submit the invoice to get notified about invoice submission problems or rule violations? Select only one.	Less than 0.5 hours	342	55.34%
		0.5 hours or more but less than 1 hour	81	13.11%
		1 hour or more but less than 2 hours	37	5.99%
		2 hours or more but less than 3 hours	13	2.10%
		3 hours or more but less than 5 hours	24	3.88%
		5 hours or more but less than 8 hours	12	1.94%
		8 hours or more but less than 12 hours	8	1.29%
		12 hours or more but less than 18 hours	8	1.29%
		18 hours or more but less than 24 hours	6	0.97%
		24 hours or more but less than 36 hours	17	2.75%
		36 hours or more but less than 48 hours	3	0.49%
		48 hours or more	39	6.31%
		Unknown/I don't know	28	4.53%
		Total	618	100.00%
21	What tasks must you perform to address/resolve bills that are rejected/reduced through the system for this client? Check all that apply	Check to see which invoices were rejected or revised	451	73.33%
		Reverse the invoice in the firm's time and billing system, make the corrections and then regenerate invoice file	363	59.02%
		Edit the invoice file to correct the error	461	74.96%
		Make additional edits to the invoice file (other than to just correct the error)	202	32.85%
		Generate additional supplemental information (i.e., pdf of invoice, documentation of expenses and/or other information provided by client)	164	26.67%
		Follow-up with bill reviewer on issues	219	35.61%
		Resubmit bills	510	82.93%
		Appeal adjustments taken against the invoice	208	33.82%
	(Other)	Answer electronic notes for guideline issues	1	0.16%
		Assistant & biller work on troubleshooting efforts	1	0.16%
		Client not having rates set up	1	0.16%
		Contact client	1	0.16%
		Contact client to docket information	1	0.16%
		Dependent on error, issue	2	0.33%

Q #	LF Question	Response	# Resp	% Resp
		Few rejections & can be viewed in invoice format	1	0.16%
		Had to totally retype statement in system	1	0.16%
		Have never been able to upload	1	0.16%
		I receive no notification of disallowance/rejection	1	0.16%
		It varies as to the tasks needed	1	0.16%
		Never had any bills rejected.	2	0.33%
		Not much	1	0.16%
		Once invoice is submitted, I cannot edit	1	0.16%
		Present deducts to attorney for w/o or appeal	1	0.16%
		Rejections are usually due to our error	1	0.16%
		Remind adjustors to approve budgets, use correct claim #'s	1	0.16%
		Requires more billing attorney time	1	0.16%
		Respond to questions from the client	1	0.16%
		Resubmit rejected lines (not files)	1	0.16%
		Some will not reconsider, so no remedy available	1	0.16%
		Too many	1	0.16%
		Unlock billing system from finance system	1	0.16%
		Update website for new persons or new rates	1	0.16%
		Verify if they are actually our errors, or clients	1	0.16%
		Wait for e-mail notice of accept/reject	1	0.16%
		Total # of Respondents	615	
22	On average, how many additional hours does it take each month to deal with bill rejections/revisions in the system for this client? Select only one.	Less than 5 hours	414	67.65%
		5 hours or more but less than 10 hours	124	20.26%
		10 hours or more but less than 15 hours	37	6.05%
		15 hours or more but less than 20 hours	17	2.78%
		20 hours or more but less than 30 hours	0	0.00%
		30 hours or more but less than 40 hours	0	0.00%
		40 hours or more but less than 50 hours	0	0.00%
		50 hours or more but less than 75 hours	1	0.16%
		100 hours or more	1	0.16%
		Unknown/I don't know	18	2.94%
		Total	612	100.00%
23	On average, how many days does it take from the time you submit the invoice	Less than 1 day	58	9.42%

Q #	LF Question	Response	# Resp	% Resp
	until it is approved for payment or rejected by the bill reviewer? Select only one.			
		1 day or more but less than 2 days	35	5.68%
		2 days or more but less than 3 days	35	5.68%
		3 days or more but less than 1 week	76	12.34%
		1 week or more but less than 2 weeks	79	12.82%
		2 weeks or more but less than 3 weeks	59	9.58%
		3 weeks or more but less than 1 month	65	10.55%
		1 month or more but less than 2 months	76	12.34%
		2 months or more but less than 3 months	33	5.36%
		3 months or more but less than 5 months	11	1.79%
		More than 5 months	7	1.14%
		Unknown/I don't know	82	13.31%
		Total	616	100.00%
24	On average, what percentage of invoices are rejected either by the system or the bill reviewer for this client? Select only one.	Less than 10%	422	68.84%
		10% or more but less than 20%	70	11.42%
		20% or more but less than 30%	32	5.22%
		30% or more but less than 40%	28	4.57%
		40% or more but less than 50%	7	1.14%
		50% or more but less than 60%	11	1.79%
		60% or more but less than 70%	4	0.65%
		70% or more but less than 80%	3	0.49%
		80% or more but less than 90%	0	0.00%
		90% or more	6	0.98%
		Unknown/I don't know	30	4.89%
		Total	613	
25	On average, what percentage of invoices are adjusted either by the system or the bill reviewer for this client? Select only one.	Less than 10%	356	57.79%
		10% or more but less than 20%	76	12.34%
		20% or more but less than 30%	34	5.52%
		30% or more but less than 40%	26	4.22%
		40% or more but less than 50%	9	1.46%
		50% or more but less than 60%	18	2.92%
		60% or more but less than 70%	8	1.30%
		70% or more but less than 80%	14	2.27%
		80% or more but less than 90%	12	1.95%
		90% or more	16	2.60%
		Unknown/I don't know	47	7.63%
		Total	616	100.00%
26	Is your firm paid faster by your client using this system when compared to their payment practices before using	There is no difference	197	32.03%

Q #	LF Question	Response	# Resp	% Resp
	the system? Select only one.			
		They are paying faster	192	31.22%
		They are paying slower	109	17.72%
		Unknown/I don't know	117	19.02%
		Total	615	100.00%
27	Is this system collaborative, i.e., does it allow your firm and the client representatives to work collectively on the same information? Select only one.	Yes	201	33.11%
		No	189	31.14%
		Unknown/I don't know	217	35.75%
		Total	607	100.00%
28	Does the system track information on how matters are resolved? Select only one.	Yes, it is entered by our firm	31	5.10%
		Yes, it is entered by the client	89	14.64%
		No	227	37.34%
		Unknown/I don't know	261	42.93%
		Total	608	100.00%
29	Does your client require you to provide budgets on matters? Select only one.	Yes, it is external to the system	157	25.20%
		Yes, through the system	164	26.32%
		No	302	48.48%
		Total	623	100.00%
30	What tasks must you perform to enter budgets through the system for this client? Check all that apply	Enter budget amounts per separate matter	141	88.13%
		Enter budget amounts per matter groups	5	3.13%
		Enter budget amounts by fiscal year month	33	20.63%
		Enter budget amounts by fiscal year quarter	37	23.13%
		Enter budget amounts by fiscal year	32	20.00%
		Enter budget amounts by UTBMS phase or task	57	35.63%
		Budget must be approved by the client	82	51.25%
	(Other)	Attorneys enter budgets	4	2.50%
		Depends on client	2	1.25%
		Enter budget amounts every 120 days	1	0.63%
		Total # of Respondents	160	
31	On average, how many budgets per month are submitted for this client? Select only one.	Less than 10	179	57.74%
		10 or more but less than 20	38	12.26%
		20 or more but less than 30	13	4.19%
		30 or more but less than 50	7	2.26%
		50 or more but less than 75	0	0.00%
		75 or more but less than 100	1	0.32%
		100 or more but less than 150	2	0.65%
		150 or more but less than 200	1	0.32%

Q #	LF Question	Response	# Resp	% Resp
		200 or more but less than 300	2	0.65%
		Unknown/I don't know	67	21.61%
		Total	310	100.00%
32	On average, how many hours does it take each month to submit budgets for this client? Select only one.	Less than 5 hours	201	62.81%
		5 hours or more but less than 10 hours	31	9.69%
		10 hours or more but less than 15 hours	4	1.25%
		15 hours or more but less than 20 hours	1	0.31%
		20 hours or more but less than 30 hours	1	0.31%
		30 hours or more but less than 40 hours	1	0.31%
		Unknown/I don't know	81	25.31%
		Total	320	100.00%
33	Does your client require you to provide unbilled time/work-in-progress/accrual information? Select only one.	No	484	77.69%
		Yes, external to the system	77	12.36%
		Yes, through the system	62	9.95%
		Total	623	100.00%
34	What tasks must you perform to enter unbilled time/work-in-progress/accrual information through the system for this client? Select only one.	Enter in unbilled amounts after the accrual period ends	3	4.92%
		Enter in unbilled amounts before the accrual period ends	10	16.39%
		Enter in unbilled amounts each month	13	21.31%
		Enter in unbilled amounts each quarter	5	8.20%
		Enter in unbilled amounts per separate matter	17	27.87%
		Provide unbilled amounts in a spreadsheet via bulk file upload	3	4.92%
		Provide unbilled amounts in a spreadsheet via e-mail	3	4.92%
	(Other)	Depends on client	1	1.64%
		Enter bulk file monthly, quarterly, annually	1	1.64%
		Handled by Attorneys	1	1.64%
		Nothing	1	1.64%
		Select a report that generates Unbilled Amounts	1	1.64%
		Task is performed by the attorney.	1	1.64%
		Unknown/I don't know	1	1.64%
		Total	61	100.00%
35	On average, how many hours does it take each month to submit unbilled time/work-in-progress/accrual information for this client? Select only one.	Less than 5 hours	99	72.79%

Q #	LF Question	Response	# Resp	% Resp
		5 hours or more but less than 10 hours	16	11.76%
		10 hours or more but less than 15 hours	5	3.68%
		15 hours or more but less than 20 hours	2	1.47%
		20 hours or more but less than 30 hours	1	0.74%
		Unknown/I don't know	13	9.56%
		Total	136	100.00%
36	Does the system provide any reports to your firm? Select only one.	Yes	163	26.16%
		No	460	73.84%
		Total	623	100.00%
37	What types of reports do you utilize most in this system?	A/R, WIP, History, Unpaid Balance, Atty time to date	1	0.81%
		Accept/Reject invoice reports by e-mail, budget approvals by e-mail, bill error descriptions by e-mail.	1	0.81%
		Active matter lists; invoices billed to each matter	1	0.81%
		Annual and monthly invoice lists	1	0.81%
		Approved and unpaid Invoices	1	0.81%
		Approved invoices	1	0.81%
		Bill Analysis	2	1.63%
		Bill Analysis Report, Appeal Analysis Report	1	0.81%
		Bill analysis, matter lists, timekeeper lists	1	0.81%
		Billing confirmation reports	1	0.81%
		Billing history	1	0.81%
		Billing reports	1	0.81%
		Check Matter Information, Timekeeper/Rate Report	1	0.81%
		Data package/delivery tracking	1	0.81%
		Detail of what was processed for payment. invoice submission detail. Total amounts in review.	1	0.81%
		Detailed reports on reductions made to invoices	1	0.81%
		Exceeded the Budget reports; Current/Previous Invoice Results reports	1	0.81%
		Exception reports	1	0.81%
		Finalized bill report	1	0.81%
		Firm report card	1	0.81%
		Generally matter list reports i.e. active matters and invoices reports i.e. open/unpaid invoices	1	0.81%
		I request reports monthly to track if invoices were submitted to the system	1	0.81%
		Invoice Adjustment Reports	1	0.81%
		Invoice and payment history	1	0.81%

Q #	LF Question	Response	# Resp	% Resp
		Invoice audit report(s)	3	2.44%
		Invoice Recap Report	2	1.63%
		Invoice reports	4	3.25%
		Invoice reports that document any adjustments to Fees or Expenses.	1	0.81%
		Invoice reports: invoice recaps by matter; adjustments/line entry detail.	1	0.81%
		Invoice search - several options for criteria	1	0.81%
		Invoice Status	4	3.25%
		Invoice status; Timekeeper listings	1	0.81%
		Invoice Summary Report	2	1.63%
		Invoice tracking/search	2	1.63%
		Invoices reports; Find Invoices	1	0.81%
		Invoices sent and paid.	1	0.81%
		Invoices submitted	2	1.63%
		Invoices uploaded	1	0.81%
		Invoices with deductions or in resolution	1	0.81%
		Invoicing, reductions	1	0.81%
		List of uploaded invoices	1	0.81%
		Listing for cases to utilize this system (we don't know which cases are submitted to e-bill until we paper bill and the adjuster says they have submitted this file to be e-billed)	1	0.81%
		Mainly export lists of things (submissions, matters) to Excel	1	0.81%
		Matter Reports; Pending invoices; Rejected/approved invoices	1	0.81%
		Matters and invoice status	1	0.81%
		New Matters	1	0.81%
		Not sure as we have decentralized billing and the secretaries submit and work with [system]	1	0.81%
		Notice of invoice approval; notice of invoice rejection; notice of ACH transfer; notice of invalid timekeeper	1	0.81%
		Open Invoices/Matters; Approved Invoices	1	0.81%
		Outstanding Adjusted Invoice Report, Resolution Pending Report, Pending Rejection Report and Pending Approval Report	1	0.81%
		Outstanding Invoices	4	3.25%
		Paid invoices, approved timekeepers/rates, reduced invoices/adjustments	1	0.81%
		Paid Invoices; what the guideline issues and where the adjustments are.	1	0.81%
		Payments processed, active matters, adjustment reports	1	0.81%

Q #	LF Question	Response	# Resp	% Resp
		Payment information.	1	0.81%
		Payment rejection summaries.	1	0.81%
		Payment/remittance lists	1	0.81%
		Payments made; invoices received	1	0.81%
		Payments tracking	1	0.81%
		Pending Status, Open Matters, Invoice History, Rejected Invoices, Client Matter Id's and Approved Rate Structures	1	0.81%
		Posted invoices which shows us which invoices are being approved for payment	1	0.81%
		Processed invoices; invoices in review	1	0.81%
		Rates Acceptance; Case Acceptance; Invoice Submission Verification; Invoice Rejected / Deductions; Ready to Pay notices	1	0.81%
		Recaps on rejected items; basic info	1	0.81%
		Reduction notices	1	0.81%
		Reduction/Exception Reports and Bill Summaries	1	0.81%
		Rejected invoices; adjusted invoices	1	0.81%
		Rejection Reports	1	0.81%
		Rejection reports to be used for my appeals	1	0.81%
		Reports are similar to the firm accounting reports so not useful	1	0.81%
		Reports on status of payments.	1	0.81%
		Reports showing invoices that have not been paid	1	0.81%
		Reports that show PAID and APPROVED invoices	1	0.81%
		Safe receipt notifications and invoice acceptance notifications	1	0.81%
		Shows which invoices released, amount credited, deductions, appeal credits	1	0.81%
		Status	1	0.81%
		Status and deductions	1	0.81%
		Status of invoice approval; notice of approval for payment/adjustments; notice of active matters/client's matter ID	1	0.81%
		Status of Invoice reports; Paid reports; Reduced/Rejected Reports; Matter Profile Reports	1	0.81%
		Status of invoice submitted	1	0.81%
		Status of Invoices	3	2.44%
		Status of invoices. History, budget information.	1	0.81%
		Summary	1	0.81%
		They e-mail reports on deductions taken	1	0.81%

Q #	LF Question	Response	# Resp	% Resp
		Tracking of bills submitted and paid	1	0.81%
		Unapproved statements	1	0.81%
		Unbilled time and expenses; disbursements; pre bills	1	0.81%
		We do not use reports--They are not helpful. What we refer back to are the e-mails from the reviewer.	1	0.81%
		We do not use the reports provided	12	9.76%
		We don't utilize reports but we have access; we use reports from our internal billing system	1	0.81%
		What has been approved and what has been rejected	1	0.81%
		What invoices have been submitted and where they are at in the approval/payment process	1	0.81%
		When matters are processed	1	0.81%
		Year-to-date to budget.	1	0.81%
		Total	123	100.00%
38	What other types of reports would you like to see available in this system?	?	1	1.56%
		A better report of the above. For us to have access to a good reporting system.	1	1.56%
		A list of unpaid invoices.	1	1.56%
		Account breakdown to show when submitted, accepted, approved, paid etc.	1	1.56%
		Active files	1	1.56%
		Additional historical information by the firm as to billings, write offs and payments	1	1.56%
		Again, some sort of summary of the processing timeline from submission to acceptance to payment.	1	1.56%
		All e-billing vendors should supply any changes when client updates are processed on the website, which would include new matters with client Id's, working timekeepers, rate approvals and a monthly status report of all open matters which reflect payment status. We shouldn't have to find this data on the website, it should be sent automatically.	1	1.56%
		Amounts rejected / adjusted.	1	1.56%
		Any reports would be great!	1	1.56%
		Approved Rates/Timekeepers	1	1.56%
		Bill and Payment with breakdowns	3	4.69%
		Comments made on rejected invoices	1	1.56%
		Comments on rejected invoices	1	1.56%
		Currently available reports are	1	1.56%

Q #	LF Question	Response	# Resp	% Resp
		sufficient		
		Detailed accounting of each "Ready to Pay" invoice, detailing the Fees / Costs being paid, not just a "total payment" figure	1	1.56%
		Detailed history of deducted fees & costs	1	1.56%
		Fees to Date by matter, Expenses to Date by matter	1	1.56%
		For [system] I would like to see a report to search by all invoices that use a specific line item by a specific date for a specific Client	1	1.56%
		I can't think of anything right now	1	1.56%
		I just want a new system...	1	1.56%
		Information on statistics to the firm	1	1.56%
		Invoice History through which we can check the record of invoice submission	1	1.56%
		Invoice status, and submission stored directly in site so that I do not have to request them from Customer Support	1	1.56%
		invoice tracking aligned with client's system	1	1.56%
		Invoices that have been rejected	1	1.56%
		It would be nice if you could run the report for one client instead of having all clients co-mingled	1	1.56%
		Law firm information reports - active timekeepers with rates, active matter listings with client matter #	1	1.56%
		Like to see list of all cases on 1 report, by billing month, appeals submitted etc. instead of having to enter each matter and each invoice individually	1	1.56%
		List of invoices separated by action -- approved, waiting for review, etc.	1	1.56%
		Monthly Summary of all invoices billed, details of adjustments/discounts taken, net amounts approved for payment	1	1.56%
		None or N/A	14	21.88%
		Not much. pretty comprehensive as is	1	1.56%
		Notify via e-mail when an invoice has been paid	1	1.56%
		Payment History - We can see that the invoice has been approved for payment, but we do not see the payment schedule documenting at payment has been issued or any historical payment history such as check numbers, date of payment, amount of payment, etc.	1	1.56%
		Payment issuance information by e-mail, budget exhaustion notification by	1	1.56%

Q #	LF Question	Response	# Resp	% Resp
		e-mail		
		Payment notifications	1	1.56%
		Rejection/Reduction Reports and reasons why	1	1.56%
		Report of outstanding invoices	1	1.56%
		Report showing unapproved invoices	1	1.56%
		Statement breakdown to track ALL invoices from submission to payment	1	1.56%
		Status of invoice approval, especially where invoice is in approval chain	1	1.56%
		Summary of processing time from bill submission to bill acceptance to bill payment	1	1.56%
		Summary Reports on why invoices are rejected or adjusted	1	1.56%
		The matter id's list or the billing reference number list	1	1.56%
		Total firm history of reductions, reasons and timing of payments	1	1.56%
		We're happy with the system	1	1.56%
		When checks or wire have been submitted	1	1.56%
		Would like to see activity on matters, i.e.. who activated/inactivated a matter	1	1.56%
		Total	64	100.00%
39	Does your firm pay a fee to use this system or is it subsidized by your client? Select only one.v	A discount is applied by the client to invoices paid through the system	56	9.14%
		The system is provided at no cost to the firm	261	42.58%
		The firm pays a fee to the vendor	247	40.29%
		Unknown/I don't know	49	7.99%
		Total	613	100.00%
40	What features do you like best in this system?	Ability to add matters without waiting for a reviewer or adjuster to do so	2	0.47%
		Ability to add/modify timekeepers and/or rates immediately to complete transaction	8	1.89%
		Ability to appeal invoice reductions	5	1.18%
		Ability to apply credits on invoices	1	0.24%
		Ability to assign multiple law firm matter IDs to the same client matter	1	0.24%
		Ability to attach backup documentation for expenses	2	0.47%
		Ability to attach documents to the line items on the invoices	3	0.71%
		Ability to correct invoice issues online	24	5.67%
		Ability to customize home page	1	0.24%
		Ability to delete the invoice from the queue if necessary	4	0.95%
		Ability to display clients	1	0.24%
		Ability to edit law firm matter IDs	1	0.24%

Q #	LF Question	Response	# Resp	% Resp
		Ability to e-mail the bill instead of having to upload	4	0.95%
		Ability to enter budget information	2	0.47%
		Ability to look at multiple clients using system or just one of them	1	0.24%
		Ability to post notes on individual invoices	1	0.24%
		Ability to search for/access/review matters or matter information	22	5.20%
		Ability to test draft invoice prior to actual invoice submission	20	4.73%
		Ability to track invoice status/submission/rejection/reduction/payment/appeal status or transparency on invoice status	49	11.58%
		Ability to track timekeeper information	13	3.07%
		Ability to track timekeeper rate information	7	1.65%
		Accessibility	3	0.71%
		Accuracy of the system	1	0.24%
		Address field	1	0.24%
		Allows for submission of invoices even if other information on matter is needed. The system will "hold" the invoice until the information needed is submitted, after that the invoice is released into a "pending" status. This saves time.	1	0.24%
		Automates receipt of invoices by client	1	0.24%
		Backup attachment	1	0.24%
		Broad search functionality including partial word search	2	0.47%
		Case tracking	1	0.24%
		Changes to features/new features are e-mailed to me so that I will know what will happen	1	0.24%
		Clear explanation of invoice errors and how to fix them	8	1.89%
		Common formatting requirements for clients who use this system	1	0.24%
		Consistently operates smoothly	1	0.24%
		Debit notes are settled in a timely manner.	1	0.24%
		Deductions are rarely taken against invoices	1	0.24%
		Does not require attorney to access site	1	0.24%
		Does not require backup copies of hard costs	1	0.24%
		Does not require budget information	1	0.24%
		Does not require case notes	1	0.24%
		Does not require case status	1	0.24%
		Does not require coding	3	0.71%

Q #	LF Question	Response	# Resp	% Resp
		Does not require matter entry by law firm	2	0.47%
		Does not require matter information	2	0.47%
		Does not require timekeeper entry	6	1.42%
		Does not require timekeepers rates	3	0.71%
		Easy to administer	1	0.24%
		Easy to input information	1	0.24%
		Easy/Easy to use/Intuitive/Simple/Straight-forward/User friendly	114	26.95%
		Easy/fast to setup system	5	1.18%
		Efficient	2	0.47%
		Eliminates paper	4	0.95%
		Fast	13	3.07%
		Fast payment	10	2.36%
		Fast processing of invoices/speed of invoice review from submission to payment	9	2.13%
		Flat Fee invoices submitted electronically take less time to prepare and submit than paper equivalent	1	0.24%
		Flexible	2	0.47%
		Free/no cost to firm	11	2.60%
		Functionality for debit notes, and debit notes are settled in a timely manner.	1	0.24%
		Functionality to upload/post/submit invoices	58	13.71%
		Help Desk/Tech Support/Customer Support	17	4.02%
		Initiative	1	0.24%
		Interactive data - functionality to get the information directly from site	1	0.24%
		Invoice format: Ability to upload invoice in pdf format	6	1.42%
		Invoice format: Adheres to LEDES standards without modifications	3	0.71%
		Invoice format: LEDES format accepted	2	0.47%
		Invoice format: Type of invoice file required is better than LEDES 98B because it doesn't repeat information	1	0.24%
		Invoice format: Uses LEDES 98B	1	0.24%
		It works relatively well and is less painful than any other system	1	0.24%
		Its a good system, no problems	1	0.24%
		Low maintenance from the firm's perspective	2	0.47%
		Matter information includes client contact	1	0.24%
		Minimal information needs to be input	1	0.24%
		Minimizes errors	1	0.24%
		Most of the time invoices are error free	1	0.24%
		Multiple invoices functionality to be	15	3.55%

Q #	LF Question	Response	# Resp	% Resp
		submitted at a time/in same file/system only rejects single invoices with errors during this process		
		None	51	12.06%
		Notifications: E-Mail notification of invoice submission/rejection/adjustment/acceptance/ payment	14	3.31%
		Notifications: Notification of invoice upload/submission success/errors is very fast	38	8.98%
		Notifications: Notification of new matter assigned to firm received by e-mail	1	0.24%
		Our use of third party tool to administer e-billing greatly impacts the responses of this survey	1	0.24%
		Password never changes	1	0.24%
		Rate approval process via fee offer	1	0.24%
		Reliable	1	0.24%
		Reporting feature	1	0.24%
		Requires limited task coding	1	0.24%
		Search for information	1	0.24%
		Single system login accesses all clients	1	0.24%
		Smooth process so long as correctly coded	1	0.24%
		Status updates are date stamped	1	0.24%
		Submit As Is option	1	0.24%
		Summary Report	1	0.24%
		System availability	1	0.24%
		System does not "read" the invoices or flag certain words.	1	0.24%
		System is attached to in-house time and billing system	1	0.24%
		System is not constantly updated so does not require additional training (unlike other systems)	1	0.24%
		System layout and ease of navigation	6	1.42%
		System posts client and system documentation (guidelines, billing guidelines, file/field specification documentation, etc.)	1	0.24%
		System provides comprehensive information to law firm	1	0.24%
		System provides history of invoices uploaded since 2003	1	0.24%
		The initial set is very structured and easy to follow. System is user friendly as far as the initial submission process.	1	0.24%
		Versatile	1	0.24%
		Very elaborate system, provides lots of information to resolve any issues that	1	0.24%

Q #	LF Question	Response	# Resp	% Resp
		arise.		
		Total # of Respondents	423	
41	What features do you like least in this system?	Access to matter information not granted to billing manager/administrator; must be granted by attorney	4	0.94%
		Accruals: Accrual reporting is often broken	1	0.23%
		Accruals: Process is too dependant on attorneys	1	0.23%
		Accruals: Required to enter Accruals	1	0.23%
		Adjustments/write downs: Are often unwarranted and credited back upon appeal	1	0.23%
		Adjustments/write downs: The extent to which these occur in the system	6	1.41%
		Administrative requirements (Matter Profiles, Status Reports, Accruals, and Budgets) placed on law firm lead counsel to complete	1	0.23%
		Appeal process	4	0.94%
		Appeal process: Appeal feature is not user friendly	1	0.23%
		Appeal process: Appeal process is through a separate area	3	0.70%
		Appeal process: Is different for every client using this system	1	0.23%
		Appeal process: Unable to appeal prior to check	1	0.23%
		Appeals: No electronic appeal process	3	0.70%
		Appeals: not all adjustments/reductions display on the Appeals page; Also, can't appeal a higher (one cost they wouldn't allow me to raise, even though the cost was real)	1	0.23%
		Attorneys are expected by client to use system	3	0.70%
		Attorneys are expected to complete budgets	1	0.23%
		Attorneys are expected to complete matter profiles	1	0.23%
		Attorneys don't want to use system/attorneys provide their login credentials to firm administrative staff to complete tasks they are required to handle	2	0.47%
		Attorneys forward notifications on matter management to accounting because attorneys think the messages pertain to billing	1	0.23%
		Attorneys must grant firm users access to matters	2	0.47%

Q #	LF Question	Response	# Resp	% Resp
		Attorneys need to complete their own profile and add delegates	1	0.23%
		Attorneys use of the system should be billable	1	0.23%
		Bill review process takes more than a month	1	0.23%
		Bill reviewer does not have case knowledge and arbitrarily reduces our bills	1	0.23%
		Bill reviewer turnover impacts the speed of invoice review.	1	0.23%
		Bill reviewers do not carefully review adjustments/write downs	1	0.23%
		Billing guidelines can be difficult to comply with	1	0.23%
		Budgets	3	0.70%
		Budgets: Approval is not timely	1	0.23%
		Budgets: Budget entry	2	0.47%
		Budgets: Process is too dependant on attorneys	1	0.23%
		Budgets: Updating budgets is necessary to post invoices	2	0.47%
		Can not "finalize" invoices in firm's billing system until invoice is approved	1	0.23%
		Can not add matters, must wait for client to do so or for feed from client's system to occur; delays ability to submit invoice	10	2.35%
		Can not add new matters; have to send e-mail to get them added	1	0.23%
		Can not add/enter/update timekeeper info; must wait for client to do so; delays ability to submit invoice	7	1.64%
		Can not add/enter/update timekeeper rates; must wait for client to do so; delays ability to submit invoice	7	1.64%
		Can not attach documentation for expenses	1	0.23%
		Can not check adjustments/exceptions on invoices	2	0.47%
		Can not check the status on submissions/invoices/payments	41	9.62%
		Can not check whether invoice has been rejected	1	0.23%
		Can not correct invoice electronic reductions before invoice is submitted to reviewers	1	0.23%
		Can not correct invoices on-line	11	2.58%
		Can not export payment information	2	0.47%
		Can not get information on invoices submitted more than 30 days ago	2	0.47%
		Can not immediately correct timekeeper/rate issues so that invoices	1	0.23%

Q #	LF Question	Response	# Resp	% Resp
		are accepted		
		Can not make mass changes in system	1	0.23%
		Can not print from my computer with Windows 07 if I have reductions on my invoice	1	0.23%
		Can not print out report of adjustments taken against invoice	3	0.70%
		Can not see list of open matters	1	0.23%
		Can not see the status of an invoice in the clients workflow process	4	0.94%
		Can not submit invoices until budget is approved	2	0.47%
		Can not submit invoices until case plan is approved	1	0.23%
		Can not submit invoices until timekeeper rates approved	1	0.23%
		Can not upload backup documentation per invoice until the invoice is submitted.	1	0.23%
		Can not upload/submit multiple invoices in same session/in single invoice file	11	2.58%
		Can not view approved timekeepers or rates	5	1.17%
		Can not view invoices	8	1.88%
		Can not view or search matters	7	1.64%
		Can not view timekeeper rates	1	0.23%
		Can not view timekeeper/rate information	4	0.94%
		Can only submit invoices, no other information is available to firm in system	11	2.58%
		Case list contains many closed matters; nothing is ever archived	2	0.47%
		Central bill reviewer does not understand case, frequently rejects for "inadequate description" on 20-30% of time entries resulting in need for firm to appeal reductions	1	0.23%
		Certificate required to submit invoices requires me to log in as a different user	1	0.23%
		Client departments have different criteria	1	0.23%
		Client does not notify us when changes are made to submission guidelines	2	0.47%
		Client does not update reviewer routing chains when someone leaves; causes delay in ability to get invoices reviewed and paid	2	0.47%
		Clients enter information on matters/this is not done in a timely manner/this is not done accurately	6	1.41%
		Clients enter information on	5	1.17%

Q #	LF Question	Response	# Resp	% Resp
		timekeepers and/or rates/this is not done in a timely manner/this is not done accurately		
		Clients required to create Matter IDs	1	0.23%
		Client's staff do not understand system or requirements	1	0.23%
		Client's staff have difficulty using the system	1	0.23%
		Complicated/obscure process/not intuitive	3	0.70%
		Costly to the law firm as it takes more administrative effort than paper billing	4	0.94%
		Delay between approval and receipt of payment	2	0.47%
		Delay between submitting an invoice and notification of acceptance/rejection	1	0.23%
		Different requirements of multiple clients using system for invoice "header" information	2	0.47%
		Different than the normal billing system, requires double entry into our billing system	1	0.23%
		Difficult to change rates	1	0.23%
		Difficult to determine exact item needing revision	2	0.47%
		Difficult to submit fee offers	1	0.23%
		Difficult/cumbersome system to use	5	1.17%
		Difficulty in determining which matters are which	1	0.23%
		Do not have direct communication with client	1	0.23%
		Do not have enough matters to master system; have to relearn each time we go on system	1	0.23%
		Do not know who I am supposed to talk to about receipt of the bill and status of payment	1	0.23%
		Do not receive all information necessary for invoice submission when new matter is opened by client; delays ability to submit bill	2	0.47%
		Do not understand what all this information is used for	1	0.23%
		Does not display the client's matter number to the law firm	1	0.23%
		Does not distinguish between matters requiring information that prevent law firm from uploading invoices versus matters that are okay to upload invoices	1	0.23%
		Does not provide much information for the law firm	2	0.47%

Q #	LF Question	Response	# Resp	% Resp
		Duplication of billing already created	2	0.47%
		Each of our offices are treated as different vendors and have to submit invoices separately	1	0.23%
		Electronic or manual invoice review is too rigid in terms of making reductions	3	0.70%
		Electronic rules: Automated rejections by key words/Restricted key words create additional burden in reviewing draft invoices	9	2.11%
		Electronic rules: Automatic deductions based on Task Codes	1	0.23%
		Electronic rules: Basic information (such as firm name) is verified on each invoice	1	0.23%
		Electronic rules: Does not provide information on what is wrong until the client rejects the invoice	1	0.23%
		Electronic rules: Frequency of rejections based on electronic rule violations	2	0.47%
		Electronic rules: Heavy reliance on Matter Id's	1	0.23%
		Electronic rules: Lack of feedback when error messages are received.	1	0.23%
		Electronic rules: Make system difficult to use	1	0.23%
		Electronic rules: May be set too broad by the client	1	0.23%
		Electronic rules: Number of reasons for which an invoice can be rejected	2	0.47%
		Electronic rules: Timekeeper check on submission also checks Timekeepers on expense lines	1	0.23%
		E-Mail rights are not consistent	1	0.23%
		Error messages are not intuitive or descriptive enough	14	3.29%
		Error Messages: It's hard to find the window that explains what the rejection means	1	0.23%
		Everything	9	2.11%
		Fee is based upon amount of bills submitted; should be based upon the number of bills submitted	1	0.23%
		Fee required to use system	18	4.23%
		Firm has engaged third party vendor to provide system to administer e-billing because of inconsistencies from client-to-client or vendor-to-vendor	3	0.70%
		Functionality: Functionality for billing shared fee cases (where client pays less than 100% of costs on matter)	1	0.23%
		Functionality: Multiple selections	1	0.23%

Q #	LF Question	Response	# Resp	% Resp
		required for invoice and expense submission		
		Functionality: Required to first enter fee or cost on invoice and then can enter a note; in another system you can enter the fee or cost and make a note of what it is for all in one upload process	1	0.23%
		Functionality: System could not handle it when we submit a large number of invoices at one time	1	0.23%
		Functionality: The "Report Missing Matter" never seems to get any response	1	0.23%
		Functionality: Timekeeper and rate entry procedures are tedious and immensely time consuming	1	0.23%
		Functionality: To enter timekeeper at higher rate you must create a new timekeeper and, once approved, delete the old one with a lower rate	1	0.23%
		Have to reconcile system matters to matters listed in time and billing system	2	0.47%
		Help Desk/Tech Support/Customer Support or a inability to contact a person	5	1.17%
		Help on site is not helpful	1	0.23%
		High volume of adjustments/discounts and rejected items	3	0.70%
		I have to change my password every three months	1	0.23%
		Information flow could be better between cases, invoices, and timekeepers	1	0.23%
		Invoice File: Ensuring that pipe symbols ("|") are in a certain place is very annoying. The fields don't populate correctly, which requires manual editing.	1	0.23%
		Invoice format: 255 character limit on invoice verbal time description	2	0.47%
		Invoice format: Coding and formatting of files differs from client to client and system to system and requires additional checking to ensure it is correct	1	0.23%
		Invoice format: Have to make extra entry so each invoice begins on 1st of billing month	1	0.23%
		Invoice format: Information required differs from client to client, although the system is the same	1	0.23%

Q #	LF Question	Response	# Resp	% Resp
		Invoice format: Length of time required to produce an invoice in the required format	1	0.23%
		Invoice format: Must retype the Timekeeper's name, billing rate, position for each entry	1	0.23%
		Invoice format: Non-standard LEDES format	2	0.47%
		Invoice format: Only able to use one client name/identifier and we have several client names/subsidiary names/numbers for this one company	1	0.23%
		Invoice format: Required by client requires outside programming to create or modify	1	0.23%
		Invoice format: Requirements can be tricky	1	0.23%
		Invoice format: Requires special formatting/manipulation/manual editing	16	3.76%
		Invoices must be matched to matters manually for almost all invoices	1	0.23%
		it doesn't update itself	1	0.23%
		Layout: Have to go page by page for additional information. Some e-bill systems have search information on one continuous page.	1	0.23%
		Layout: Layout of home page	1	0.23%
		Length of start up period	2	0.47%
		Length of time between submission and receipt of notification that invoice has passed or failed validation	5	1.17%
		Length of time it takes bill reviewers to complete invoice review	4	0.94%
		Length of time it takes to find information in the system	2	0.47%
		Length of time it takes to review key word violations that get noted inappropriately	1	0.23%
		Length of time it takes to transmit/upload invoices	1	0.23%
		Length of time to get payment reviewed, routed through all the proper approvals and then paid	1	0.23%
		Length of time to receive payment; payment is not faster with e-billing	6	1.41%
		Length of time to upload documentation of expenses	1	0.23%
		Limited access to timekeeper and matter information	1	0.23%
		Mandatory discount/reductions applied to invoices	1	0.23%
		Matter Functionality: If the client does	1	0.23%

Q #	LF Question	Response	# Resp	% Resp
		not realize we are working on a matter, we cannot add that matter until the next month		
		Matter information difficult to locate	1	0.23%
		Matter List: Closed cases not removed from list	1	0.23%
		Menus could be better	1	0.23%
		Multi-layer menus to perform common tasks	1	0.23%
		Navigation	14	3.29%
		No benefit to the firm	2	0.47%
		No client or system documentation available through system	1	0.23%
		No single sign-on; must log in when I receive e-mail with link to invoice	2	0.47%
		None	41	9.62%
		Non-standard LEDES format	1	0.23%
		Not flexible/user friendly/intuitive	11	2.58%
		Not much information available to law firm	4	0.94%
		Notification: Does not provide the date or invoice # when payments are made via ACH to firm	1	0.23%
		Notifications: Do not receive notification of invoice acceptance/rejection/adjustments	10	2.35%
		Notifications: Do not receive notification when total billing on matter is nearing the approved budgeted amount	1	0.23%
		Notifications: Do not receive reason for rejection when a debit note is rejected	1	0.23%
		Notifications: Does not notify the law firm of rejected budgets. You must monitor the website to catch these.	1	0.23%
		Notifications: E-Mail confirmation of invoice upload file errors would be better handled online via the website like other vendors	1	0.23%
		Notifications: E-Mail notifications aren't always received when there are problems with invoice submission. You need to physically check the site for rejected/problem invoices	3	0.70%
		Notifications: E-Mail re invoice submission does not include the client or matter name or number, only the invoice number	1	0.23%
		Notifications: E-Mails are only sent once invoices are approved; have to log in to check status	1	0.23%
		Notifications: E-Mails do not include client name	2	0.47%

Q #	LF Question	Response	# Resp	% Resp
		Notifications: E-Mails do not include information on reductions taken on invoices	3	0.70%
		Notifications: Go to all people with an admin role in the system rather than just one person or the submitter	1	0.23%
		Notifications: Only invoice submitter receives e-mail advising that invoice has been accepted	1	0.23%
		Notifications: Reason for rejection often not stated in e-mail, requires follow-up with client	1	0.23%
		Number of bill revisions required for acceptance/approval of invoice	1	0.23%
		Paid information is not always accurate; invoice may show in the system as paid but payment never received from the client	1	0.23%
		Payments: We receive one check payment for every invoice.	1	0.23%
		Poorly set-up and managed	1	0.23%
		Product is not standardized and extremely difficult to implement	1	0.23%
		Rate history format	1	0.23%
		Rate maintenance, matter maintenance, no ability to do mass changes, multiple selections required for invoice and expense submission...want me to go on?	1	0.23%
		Rejected invoices are hard to correct/amend and then re-submit	2	0.47%
		Rejection system	1	0.23%
		Rejections by bill reviewer after a successful electronic submission	1	0.23%
		Rejects all invoices instead of just the one with a problem	1	0.23%
		Reports: No reports available to law firm	14	3.29%
		Require input from IT whenever a bill is rejected in order to resolve issues	1	0.23%
		Required during upload process to enter case names; system should be able to "read" case name and matter numbers on invoice without	1	0.23%
		Required header fields are sometimes difficult to obtain	1	0.23%
		Required to add a pdf file with invoice backup; is unnecessarily time consuming and difficult	1	0.23%
		Required to add upload chart of timekeepers, and the attorneys on the client side have to approve them before you can submit a bill. Not a fast	1	0.23%

Q #	LF Question	Response	# Resp	% Resp
		process		
		Required to change password. I am system administrator for 13 sites and having to update my password is annoying	1	0.23%
		Required to change the percentage owed by our client on each and every invoice-- should have a default set up for our firm or on matter	1	0.23%
		Required to check a box indicating that the bill is in US Dollars. This should be the default and the box checked only if NOT in US Dollars	1	0.23%
		Required to enter budgets	1	0.23%
		Required to enter law firm's matter number	1	0.23%
		Required to enter matter information	4	0.94%
		Required to enter matters	2	0.47%
		Required to enter timekeeper rates	15	3.52%
		Required to enter timekeepers	14	3.29%
		Required to enter timekeepers for each office vs for firm	2	0.47%
		Required to entering rates each year, adding timekeepers	1	0.23%
		Required to provide accruals	1	0.23%
		Required to provide information on the matter that is only within the attorney's knowledge, some of which seems irrelevant or has not been provided to the firm	1	0.23%
		Required to rename invoice files using specific convention instead of submitting them as they are named in our office	1	0.23%
		Required to submit documentation of expenses	3	0.70%
		Required to submit invoice by the name of the plaintiff and have to search for that information	1	0.23%
		Required to submit invoices by the 7th of the month	1	0.23%
		Required to use system	1	0.23%
		Requirement that matter name must exactly match the matter name in system; should validate on the client_matter_id number	1	0.23%
		Requires certificate on computer being used so can't easily transmit/check on multiple computers	1	0.23%
		Requires diversify information on every timekeeper	1	0.23%
		Requires vendor's matter id on submission, not client's matter number	1	0.23%

Q #	LF Question	Response	# Resp	% Resp
		or law firm's matter number		
		Requires you to log in twice	1	0.23%
		Sales representatives call or e-mail too much to follow-up on progress	1	0.23%
		Search: Can not return "all" on matter search or conduct wild-card search	2	0.47%
		Search: Hard to find information	3	0.70%
		Search: Matter search feature	3	0.70%
		Search: Must search for invoices in order to access them	2	0.47%
		Search: Prefer to view data as "lists" instead of as search results	1	0.23%
		Setting up lawyers with access to system to enter budget information and matter profile. The lawyers do not want to enter the information and we end up giving their secretary or billing staff as delegates in order to enter the information for them.	1	0.23%
		Set-up for firm in system is separate for every client using system; requires redundant data entry	1	0.23%
		Set-up of timekeepers in system: are first added to firm and then connected to every client in system; requires redundant data entry	1	0.23%
		Set-up required for new client	2	0.47%
		Set-up required in law firm's billing software ("tweaking" the software so the correct information populates the correct fields).	1	0.23%
		Set-Up: The initial client setup e-mail includes eight steps with multiple sub-steps.	1	0.23%
		Should be more functionality for law firms	1	0.23%
		System co-mingles multi client information	2	0.47%
		System is too manual, nothing automated	1	0.23%
		System is very complex and confusing	1	0.23%
		System menus are confusing	1	0.23%
		System requires task code to be selected from list instead of free entry.	1	0.23%
		System should differentiate between open and closed matters in case lists	1	0.23%
		System speed	9	2.11%
		System speed: Every new action requires a refresh of the web pages; submitting invoices or looking for timekeeper info is excruciatingly long.	1	0.23%
		System speed: Takes 3-4 minutes to submit invoice before we get a	1	0.23%

Q #	LF Question	Response	# Resp	% Resp
		confirmation		
		Takes more time than paper billing	1	0.23%
		Takes much longer to get paid than paper billing	1	0.23%
		Time consuming/Time consuming compared to paper billing	10	2.35%
		Timekeeper addition is convoluted; adding timekeepers and rates should be easy	1	0.23%
		Timekeeper approval required before invoices can be submitted	1	0.23%
		Timekeeper entry is very time-consuming, and rate updates are even more time-consuming	2	0.47%
		Timekeeper upload function adds new but does not correctly update existing Timekeeper and rate info	1	0.23%
		Training: Not available from vendor or client	1	0.23%
		Uploaded invoices deemed valid must be submitted to the client as a separate step; should be automatic	1	0.23%
		User certificates tied to the PCs; caused problems with IT after we switched to servers based out-of-state	1	0.23%
		User interface is complicated, not intuitive, redundant	2	0.47%
		Web site is an IP address instead of a URL	1	0.23%
		Website causes problems with security and pop-up blockers.	1	0.23%
		Total # of Respondents	426	
42	Rate the system overall on a scale of 1 to 5 where 5 is excellent and 1 is Poor and N/A is unknown or not applicable. Consider the ease of use, functionality, features provided, and requirements of this system.	1	54	8.97%
		2	77	12.79%
		3	162	26.91%
		4	218	36.21%
		5	86	14.29%
		N/A	5	0.83%
		Total	602	100.00%
43	What best practices or other suggestions could you offer to others using this system?	A great administrator/relationship on the client side is the best asset	1	0.47%
		Allow for an hour or two for 25 -30 invoices to upload	1	0.47%
		Always be sure of the codes and timekeepers before submitting	1	0.47%
		Always follow-up as soon as possible on "created" invoices and do not forget	1	0.47%

Q #	LF Question	Response	# Resp	% Resp
		to activate them when issues are resolved		
		Appeal EVERYTHING	1	0.47%
		Attorneys must be on-board from start	1	0.47%
		Be careful when attaching back up documentation (costs, etc. It's easy to not do the correct "attaching" steps and miss them	1	0.47%
		Be patient	11	5.16%
		Before set up ensure that there is a manual back up	1	0.47%
		Bill in a timely fashion	1	0.47%
		Call client contact to confirm they received the invoice. Even when you get a delivery receipt, it's not 100% accurate.	1	0.47%
		Check to see if your invoices have gone through -- you may think they did, and then find out weeks later that they're still sitting there with errors you need to fix	1	0.47%
		Configure your home page to work for you	1	0.47%
		Conform to data requirements for IE/IF records	1	0.47%
		Consider using a third-party for invoice submission; this fosters a better working relationship with the client	1	0.47%
		Contact the Help Desk for assistance navigating the system	1	0.47%
		Create a separate folder for the client and store copies of all invoices uploaded	1	0.47%
		Create a spreadsheet or chart to distribute for obtaining header fields in house	1	0.47%
		Create Invoice Templates for faster submission of invoices without having to enter each fee or cost separately and waiting for it to load each time	1	0.47%
		Devise your own reporting tools as the system does not offer any	1	0.47%
		Do not assume that an invoice that is not showing in queue has been successfully submitted	1	0.47%
		Do not block bill	1	0.47%
		Do not finalize the invoice in your time and billing system until you get it successfully submitted	1	0.47%
		Do not put timekeeper IDs on expense lines	1	0.47%
		Double and triple check spacing correct to avoid rejection of entire	1	0.47%

Q #	LF Question	Response	# Resp	% Resp
		batch		
		E-Billing will be easy if the client guidelines are set up in your time and billing system	1	0.47%
		E-Billing will be easy if your LEDES files are set up properly	1	0.47%
		Enter the full law firm client matter number in both the client and matter fields	1	0.47%
		Follow the client's billing guidelines	10	4.69%
		Follow the directions and it is user friendly	1	0.47%
		Follow-up quickly	1	0.47%
		Get a written agreement of how many days it will take for payment to issue	1	0.47%
		Get clear direction on how to set up system	1	0.47%
		Get a third party system to administer e-billing	1	0.47%
		Hack their security to make it work for your firm	1	0.47%
		Have a contact at the client that can assist with getting matters set up in the system	3	1.41%
		Have a contact at the client that can assist with getting timekeepers set up in system	2	0.94%
		Have a procedure to quickly obtain the client data (i.e. reference number, contact name, etc.) for validation on submitted invoice files	1	0.47%
		Have good communication with the client so you know what is going on	1	0.47%
		Hire a consultant to get you setup in the beginning	1	0.47%
		Hire someone with experience to handle e-billing	1	0.47%
		If it is necessary to have all timekeepers and rates approved in advance, be sure to have this done	1	0.47%
		If possible secure client agreement to cover the increased costs and admin time the system causes	1	0.47%
		If you are required to change your password, just add a number at the end	1	0.47%
		If you have large updates to do to timekeepers/rates (e.g., annual increase) see if the vendor has an upload function - there may be an undocumented process	1	0.47%
		If you use a client-matter ID system, use both numbers in the firm matter ID	1	0.47%

Q #	LF Question	Response	# Resp	% Resp
		field or else the invoice can be identified with the wrong client		
		Investigate features in the program available to track the status of invoices	1	0.47%
		It can take 2-4 full time employees per 300 matters until everyone is up to speed using the system	1	0.47%
		It can take a few days for submissions to come back with errors, so you can't just check the next day after you submit and assume everything will be there	1	0.47%
		It gets easier over time	1	0.47%
		Keep a file of all user/pw for the attorneys so you can go in the system as the attorney if necessary	1	0.47%
		Keep a log of submissions showing the file submission dates, payment approval dates, and actual payment dates	3	1.41%
		Keep on top of new matters. If they are not available, contact your client so that they set them up quickly.	1	0.47%
		Keep paper copies of invoices submitted because the system does not	1	0.47%
		Keep print screens of rejections and record tracking # on all invoices sent	1	0.47%
		Keep the file size consistent -- if there is a very large statement, submit it separately	1	0.47%
		Know your case numbers	1	0.47%
		Learn and understand the user roles	1	0.47%
		Learn how LEDES works!	1	0.47%
		Learn how to edit your LEDES invoice files	1	0.47%
		Learn how to use the Help features	1	0.47%
		Learn how to utilize the system to your advantage	1	0.47%
		Learn how to write code	1	0.47%
		Learn the system front and back	1	0.47%
		Learn the website - there is a lot of information available	1	0.47%
		Make friends with someone in client's accounting department	1	0.47%
		Make friends with the client liaison	1	0.47%
		Make friends with the vendor liaison	1	0.47%
		Make notes on special handling instructions	1	0.47%
		Make sure that all the proper boxes (i.e.. payable in US funds)	1	0.47%
		Make sure that codes are correct before you submit invoices	4	1.88%

Q #	LF Question	Response	# Resp	% Resp
		Make sure that codes are correct to avoid rejection of entire batch	1	0.47%
		Make sure that cost item discounts for copies, fax and phone are correct before submitting invoice	1	0.47%
		Make sure that firm administrator or client provides you with access to all matters you bill upfront	3	1.41%
		Make sure that item description length is appropriate before you submit invoices	1	0.47%
		Make sure that LEDES file is correct before uploading	1	0.47%
		Make sure that lines of business in your invoices match those in the system	1	0.47%
		Make sure that matter numbers are correct before you submit invoices	1	0.47%
		Make sure that matters are added/updated prior to e-billing	5	2.35%
		Make sure that matters in your invoices match those in the system	1	0.47%
		Make sure that the client reference numbers are on the LEDES files	1	0.47%
		Make sure that the timekeepers in charge of the case pay attention to reminder e-mails they receive	1	0.47%
		Make sure that the timekeepers in charge of the case understand their deadlines	1	0.47%
		Make sure that timekeeper rates are added/updated/approved prior to e-billing	3	1.41%
		Make sure that timekeeper rates in your invoices match those in the system	1	0.47%
		Make sure that timekeepers are added/updated/approved prior to e-billing	6	2.82%
		Make sure that timekeepers in your invoices match those in the system	2	0.94%
		Make sure that you do not use disallowed key words	5	2.35%
		Make sure that your discounted costs are correct before submitting	1	0.47%
		Make sure to add the firm's matter number to matters	1	0.47%
		Make sure to attend training; the more you train the more you will get out of the system	7	3.29%
		Make sure to check the system often/daily/weekly for additional rejection notifications posted after the initial transmission	1	0.47%

Q #	LF Question	Response	# Resp	% Resp
		Make sure to check the system often/daily/weekly for anything that does not look 100% OK	1	0.47%
		Make sure to check the system often/daily/weekly for status of invoices and monitoring of pending issues on invoices	10	4.69%
		Make sure to check your e-mails for billing errors on matters previously sent	1	0.47%
		Make sure to log in and check the status of your invoices; the system does not send e-mails regarding deductions/rejected invoices	1	0.47%
		Make sure to review code entries before submitting invoices	1	0.47%
		Make sure to review the invoice file before submission	3	1.41%
		Make sure to review the time entries before submitting invoices	2	0.94%
		Make sure you follow up on submitted invoices for deductions and rejections	1	0.47%
		Make sure you have multiple users on each matter as backup in case attorneys do not complete required tasks	1	0.47%
		Make sure your billing software is compatible	1	0.47%
		Make sure your invoices are correct before submitting	1	0.47%
		Make sure your matter IDs are unique if you have other clients using the system	2	0.94%
		Make sure your timekeepers are system users	1	0.47%
		N/A, No comment or None	34	15.96%
		Negotiate the rate - they ask for a flat rate, but if you have a low volume the client will negotiate with you	1	0.47%
		Really get to know the system	1	0.47%
		Report missing matters ASAP	2	0.94%
		Seek advice from other firms who have used same system	2	0.94%
		Set up system carefully	4	1.88%
		Some clients need to be reminded to approve fee offers	1	0.47%
		Stay on top of matter management	1	0.47%
		Study the user guide	1	0.47%
		System provides many reports and options for any level user	1	0.47%
		Take the time to learn system	1	0.47%
		Take your time and be careful	1	0.47%
		The system is self-explanatory and user friendly	1	0.47%

Q #	LF Question	Response	# Resp	% Resp
		There are a ton of helpful hidden reports	1	0.47%
		Train attorneys/billing coordinators/everyone/timekeepers/users	5	2.35%
		Trying to keep up with system requirements is very difficult when training an entire department	1	0.47%
		Understand the client and system instructions	2	0.94%
		Unless you use the system numerous times each month, write down short notes on accessing various features	1	0.47%
		Use the help desk - they will help you!	1	0.47%
		Use the online help feature	1	0.47%
		Use the same login and password for all your clients if possible	1	0.47%
		Work with your client to find a good system to obtain matter ids/link matters	2	0.94%
		You can save time on appeals by requiring timekeepers to write detailed time entries. This is especially important if invoices are reviewed by central office personnel with no knowledge of individual case matters. Explain why every action is necessary and reason it is complicated.	2	0.94%
		You can submit batches of invoices in a single file	2	0.94%
		Response removed/not a productive suggestion	40	18.78%
		Total # of Respondents	213	
44	What suggestions could you offer to enhance the overall features and usability of this system?	Access to client's timekeeper and rate list	1	0.40%
		Accruals: Provide functionality to "duplicate" the entry so there is no need to repeat processes	1	0.40%
		Add ability for any user (especially attorneys) to name delegates to handle their tasks	1	0.40%
		Add ability for law firm to store our own matter name reference. Currently we only see the client's matter reference and if there are 3 cases for the same insured, it is difficult for us to tell which matter is which. Information should display in the system to us by our matter name reference.	1	0.40%
		Add ability for law firm to view invoices	2	0.81%
		Add ability for law firms to delete unapproved invoices from the system	2	0.81%

Q #	LF Question	Response	# Resp	% Resp
		Add ability to access/view all data	1	0.40%
		Add ability to access/view invoice even after delivery to client	1	0.40%
		Add ability to access/view matters	4	1.62%
		Add ability to access/view timekeeper rates/approved rates and effective dates	7	2.83%
		Add ability to access/view timekeepers/approved timekeepers	6	2.43%
		Add ability to add matters	2	0.81%
		Add ability to add notes to the time, fee or cost line items created	1	0.40%
		Add ability to add timekeeper rates	2	0.81%
		Add ability to add timekeepers	2	0.81%
		Add ability to appeal adjustments/reductions taken against invoices	2	0.81%
		Add ability to correct small errors on invoices on-line	7	2.83%
		Add ability to do joint billing	1	0.40%
		Add ability to enter comments which generate an e-mail notification to the invoice approver for payment or status update	1	0.40%
		Add ability to export list of the matters assigned to firm	1	0.40%
		Add ability to identify client matter numbers	2	0.81%
		Add ability to identify new matters opened	1	0.40%
		Add ability to request missing matters through system	2	0.81%
		Add ability to search by plaintiff and insured names in the Approved Matters screen	1	0.40%
		Add ability to submit appeals on-line rather than having to e-mail or write letters to attorney-appeals	1	0.40%
		Add ability to submit large volumes of invoices (300 or more) at one time	1	0.40%
		Add ability to submit multiple invoices in same file and, once uploaded, then attach backup documentation to the invoices in the file via the web site	1	0.40%
		Add ability to submit multiple invoices in same invoice file such that if one invoice in file is rejected, only that invoice is rejected -- not the entire file	1	0.40%
		Add ability to submit multiple invoices in same invoice file/session	6	2.43%
		Add ability to submit multiple invoices in same session without using FTP or automated script from e-billing system	1	0.40%

Q #	LF Question	Response	# Resp	% Resp
		Add ability to submit multiple matters per invoice	2	0.81%
		Add ability to track invoice status, including whether invoice has been submitted and where invoice falls in review chain	26	10.53%
		Add ability to track progress of missing matters. There is currently no way to tell if the client has received and reviewed my request or if it is lost in the system.	1	0.40%
		Add ability to upload budgets	1	0.40%
		Add ability to upload/attach documents to invoice/invoice line items via web site	3	1.21%
		Add features for law firms beyond just ability to submit invoices	8	3.24%
		Add functionality to request follow-up	1	0.40%
		Add language support for other than English	1	0.40%
		Add report showing full invoice detail, reductions taken against each line and name of reviewer taking reduction	1	0.40%
		Add report showing invoice submissions/rejections/approvals/adjustments/ payments	10	4.05%
		Add report showing outstanding/pending payments	1	0.40%
		Add report showing reductions taken against invoices by week/month and separate by client	2	0.81%
		Add report showing status of billing by month	1	0.40%
		Add reporting tools to access data BY CLIENT	1	0.40%
		Add reports/reporting tool for law firms	11	4.45%
		Add wild card search functionality	1	0.40%
		All reports in system should be printable	1	0.40%
		All reports should be exportable to common formats	1	0.40%
		Allow for "exceptions" on invoices instead of rejecting outright	1	0.40%
		Allow for manual back-up of law firm information	2	0.81%
		Allow pending invoice submission for new matters that have all information necessary to bill but may be missing other information not necessary for billing	1	0.40%
		Allow submission of invoices after matter is marked "closed"	1	0.40%
		Appeal functionality: Present the	1	0.40%

Q #	LF Question	Response	# Resp	% Resp
		deductions that can be appealed in same order as on the original invoice--it's very time consuming matching up the attorney appeal language (from a printout of released invoice) and the deduction/appeal window entries listed according to category of deduction		
		Appeal process should be outside of system	1	0.40%
		Appeal process should start immediately on approval of invoice	1	0.40%
		Attorneys should not assign user access to the system or matter	1	0.40%
		Automate the selection of/provide drop-downs of timekeeper names, initials and rates when entering invoice items	1	0.40%
		Bill review should be faster	1	0.40%
		Bill reviewers should make reasonable reductions instead of unreasonably adjusting invoices	1	0.40%
		Billing guidelines from vendor should be the same as those provided to law firm	1	0.40%
		Change requirement for quarterly budgets to something less burdensome	1	0.40%
		Display all timekeeper rates on one screen	1	0.40%
		Do not charge law firms for tech support-- if there is a tech problem it's because of the e-billing website	1	0.40%
		Electronic review of submitted invoices should occur immediately	1	0.40%
		Eliminate ability for bill reviewers to take reductions against invoices	1	0.40%
		Eliminate approved timekeeper check on invoice expense items	1	0.40%
		Eliminate rejection of invoices because budget has not been updated. So long as invoice is within budget, invoice should be accepted.	1	0.40%
		E-Mail alert to the bill reviewer	1	0.40%
		Extend the comment size from 255 to 300 characters	1	0.40%
		Faster payment	1	0.40%
		Form a User Group	1	0.40%
		Highlight or change color of error causing invoice to be rejected; it is difficult to find using line numbers	1	0.40%
		If the budget shows 90% attorney, 10% paralegal, each individual category is	1	0.40%

Q #	LF Question	Response	# Resp	% Resp
		calculated at a rate of 90% of the attorney's rate plus 10% of the paralegal's rate, but this is not accurate. Some categories are attorney only - such as court mandated appearances. If we budget 10 hours in this category, it should NOT be calculated at 9 hours at the attorney rate plus 1 hour at the paralegal rate. It should be 10 hours at the attorney rate. This affects whether our bill will be rejected for being over budget.		
		Immediately provide feedback regarding problems with invoice submissions, instead of having to wait for an hour	1	0.40%
		Improve administrative functions handled by firm administrator (to add users, update TKID profiles)	1	0.40%
		Improve appeal functionality	2	0.81%
		Improve features available for law firms	3	1.21%
		Improve functionality to add/edit timekeeper rates	2	0.81%
		Improve functionality to add/edit timekeepers	2	0.81%
		Improve functionality to add/edit users	1	0.40%
		Improve process for loading new timekeepers and rates	1	0.40%
		Improve response time of client case managers in updating/approving timekeeper information and rates	1	0.40%
		Improve search/matter search/rate search functionality	4	1.62%
		Improve speed of invoice upload/submission process/make invoice upload process easier	2	0.81%
		Improve speed of process to upload invoice expense documentation	1	0.40%
		Improve speed with which case managers add/update matters to the system	1	0.40%
		Improve system speed/speed with which screens load/reduce bloated web pages to improve system speed	4	1.62%
		Improve/redesign matter screen so it is easier to identify additional information required on matters	1	0.40%
		Include the payment approval date and the actual payment date to screens/reports/notifications referencing payments	1	0.40%
		Instead of rejecting an invoice because the verbal description exceeds the	1	0.40%

Q #	LF Question	Response	# Resp	% Resp
		allowed length, automatically truncate the description		
		Invoice format: Reduce (or remove) the header fields required; they are almost always a major hindrance	1	0.40%
		Invoice format: Require a more simplified but standard format for the invoice file	1	0.40%
		Invoice format: Use a standard LEDES format	2	0.81%
		Invoices not paid within a certain period of time should be flagged for follow-up by client	1	0.40%
		Invoices should be forwarded to case manager/adjusters responsible for case so that adjustments are based on their knowledge of the case and fair	1	0.40%
		Law firm billing managers should be given access to the entire system	1	0.40%
		Make closing an invoice more clear	1	0.40%
		Make system easier/more user-friendly/more intuitive	3	1.21%
		Mass update of timekeeper information/rates is too delicate and difficult	1	0.40%
		Matter IDs should be stored in the system	1	0.40%
		Matters should be associated with the firm, not to an office of the firm	1	0.40%
		Menus are not intuitive	1	0.40%
		N/A, No comment or None	40	16.19%
		Notifications: All rejections should attach the bill submitted and detail what was wrong with the bill	1	0.40%
		Notifications: E-Mail billers when new matter opened/assigned to firm	2	0.81%
		Notifications: E-Mail information on invoice submissions/rejections/approvals/adjustments/payments	15	6.07%
		Notifications: If submitting more than one invoice at a time, e-mail a separate notification for each invoice submitted instead of one e-mail for all submissions	1	0.40%
		Notifications: Include the client and matter names and law firm matter number on e-mails sent by the system	1	0.40%
		Notifications: Include the invoice number so it is easier to identify correct bill to fix	1	0.40%
		Notifications: Notification of reductions should be communicated	1	0.40%

Q #	LF Question	Response	# Resp	% Resp
		before bills are put through for payment, so revisions and resubmissions can be done instead of having to appeal reductions.		
		Notifications: Send e-mail when invoice status changes	3	1.21%
		Notifications: Should state the client name that pertains to the invoice	1	0.40%
		One client using the system only polls invoices once a month, so if a poll is missed it is another month prior to in house counsel to review/approve invoice. Polling should occur at least weekly if not daily.	1	0.40%
		Overhaul the GUI	2	0.81%
		Overhaul/redesign notification system	1	0.40%
		Payment should be faster	1	0.40%
		Permit default values for repeat data entry fields	1	0.40%
		Post the date a client reviews, approves and pays the invoice	1	0.40%
		Post white paper references within system	1	0.40%
		Process to activate or inactivate timekeepers has too many steps and screens	1	0.40%
		Program should be structured such that a single timekeeper code can have multiple billing rates instead of requiring a unique billing code for each rate	1	0.40%
		Provide a document in the system listing each of the error messages that can be returned by your system, what it means, and what the firm needs to do to correct the error	1	0.40%
		Provide ability to reach human for problem resolution	2	0.81%
		Provide better training	1	0.40%
		Provide clear instructions on reasons for rejection and how to fix invoice	3	1.21%
		Provide formatting templates for LEDES files	1	0.40%
		Provide information on invoices that were submitted for longer than just 30 days	3	1.21%
		Provide list of electronic deductions taken by system so we can make sure future invoices are correct	1	0.40%
		Provide look-up info	1	0.40%
		Provide more information on why invoice was rejected	1	0.40%
		Provide multi-lingual capabilities -	1	0.40%

Q #	LF Question	Response	# Resp	% Resp
		specifically Spanish		
		Rate checking should occur by level/position and not by timekeeper name.	1	0.40%
		Reduce the fee	2	0.81%
		Reduce the number of administrative tasks required by system	1	0.40%
		Reduce the number of mouse clicks required to go into something -- one click should be enough	1	0.40%
		Remember that the attorneys are here to practice law and we should allow them too do such for our clients. They are spending too much time dealing with the fluff. The real goal here is to submit the invoice electronically so its paid, not to track who is working on what case when. When a client hires us we explain that we are going to give you the best care and service whether that takes 1 attorney or 20. When situations arise and it takes a team of attorneys, we will make sure that ethical laws are followed including bill practices and make sure that we use those charging lower billable rates when possible to accomplish what needs to happen. After all we work for the client and want to win too!	1	0.40%
		Requiring password changes every 3 months is too frequent	1	0.40%
		Rethink menu navigation so it is more logical	1	0.40%
		Retrieve timekeeper information invoice submissions rather than require separate submission of that data	2	0.81%
		Return a single screen of all matters per client. One of our clients has matters spread out over 4 screens which makes it very difficult to locate them for submission	1	0.40%
		Separate law firm functionality by client	2	0.81%
		Service needs more web servers!	1	0.40%
		Set a default percentage at the firm level for the client	1	0.40%
		Simplify the dashboards/menus/navigation/system	8	3.24%
		Solicit law firm feedback so that issues/suggestions can be addressed	2	0.81%
		Staffing list should link timekeepers to law firm, client, matters and invoices instead of handling this in separate	1	0.40%

Q #	LF Question	Response	# Resp	% Resp
		screens		
		Standardize features, requirements and setups from client-to-client within same system	5	2.02%
		Standardize functionality in system versus other e-billing systems on market	1	0.40%
		Streamline timekeeper/rate procedures; reduce multiple screen layers	1	0.40%
		System should be more intuitive/user friendly	3	1.21%
		System should reject not flag invoice if codes are wrong	1	0.40%
		The client wants to control all of the information submitted. It would be easier if we could just do it ourselves instead of having to go through the client.	1	0.40%
		Timekeepers should be associated with the firm, not to an office of the firm	1	0.40%
		Timekeepers should be stored in the system	1	0.40%
		Use standard UTBMS codes (i.e. use "A106" instead of "A146" -- is A146 a real code, or was it supposed to be L140 and A106 combined?)	1	0.40%
		Response removed/not a productive suggestion	18	7.29%
		Total # of Respondents	247	

About the Authors

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