

CLIENT TESTIMONIAL

Bevan Brittan

Launching Wilson Proforma Tracker to Streamline Billing Processes and Increase Invoice Accuracy

Bevan Brittan is a UK Top 100 national law firm providing a comprehensive range of legal and advisory services to over 800 businesses as well as being a market-leading firm within health and social care, housing, and local and central government. Its award-winning teams provide commercial, corporate, property, regulatory, employment, and litigation (commercial and clinical negligence) legal advice.

Naturally, a firm of this size and scale produces a large number of invoices each month. As part of its general initiative to improve efficiency and productivity since implementing the Elite 3E practice management system several years ago, the firm wanted to streamline its billing processes and increase invoice accuracy. The introduction of Wilson Proforma Tracker was the next obvious step for the firm.

Why Wilson Proforma Tracker

"After documenting our business requirements and evaluating several options, Wilson Proforma Tracker was the clear winner," explains Nick Hodgson, finance director at Bevan Brittan. "Plus, Wilson Allen's technical and functional knowledge is second to none. They were exceptionally responsive and collaborative as we discussed the design of a workflow to automate the input of billing data."

Wilson Proforma Tracker integrates with Bevan Brittan's 3E system, enabling

the creation, review, and completion of draft-to-final bills by lawyers and fee earners. The workflow Wilson Allen designed reduces manual input and minimises inaccuracies caused by the re-keying of information by multiple users. This exchange of real-time data helps automate the work-to-bill life cycle, minimizing delays in bill production and delivery to improve realisation.

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**Nick Hodgson, Finance Director,
Bevan Brittan**

Best practices for a successful implementation

The project began with a two-day discovery meeting that resulted in a detailed solutions-design document that formed the structure for the delivery of the software. "The scoping meeting with the Wilson Allen team was excellent," Hodgson says. "It ensured that our functional requirements were well understood. Enough time was dedicated to this essential step both by us and Wilson Allen, which ultimately created the foundation for a successful implementation."

The firm's dedicated team for this project was kept small. It also engaged a third party to run user acceptance testing to minimise the impact on the firm's full-time finance staff while thoroughly testing the software. "Keeping our team small helped to ensure that we made decisions quickly and accurately, enabling a very effective relationship with Wilson Allen," Hodgson adds.



A dedicated resource from Wilson Allen addressed any issues that came up rapidly and effectively. In many cases, time zone differences meant that fixes would be worked on overnight in the firm's time zone and be ready for testing by them the next day. The software was rolled out incrementally over three months to ensure that most issues were identified and resolved before the full roll-out to the firm.

"We started the project with a nine months' timeframe in mind, which I am pleased to say we hit. They effectively designed a solution that meets our functional requirements with minimal customisations to reduce our long-term total cost of ownership," Hodgson adds. "Plus, the software offers a comprehensive roadmap of functionality that will be beneficial to our firm in the future."

Reducing the time spent on billing processes

Early results with Wilson Proforma Tracker have been positive. "Within our first couple of billing cycles with Wilson Proforma Tracker, we have been able to reduce the time spent on our billing processes," Hodgson explains. "There is less work in progress (WIP) remaining at the end of the month as we can include more time on each proforma that we produce. We're also able to get bills out the door more quickly, which will hopefully result in quicker cash collection."

Bevan Brittan also appreciates the increased visibility enabled by the software and its ease of use. "Our users are now able to collaborate from their desktops for quick review and markup of proformas in a very intuitive way that requires very little training," Hodgson explains. "Plus, we can see the status of all proformas in progress, which will help drive uptake within our firm."

Digital billing as a growing trend

Shishir Shetty, VP of technology services for Wilson Allen, explains why more firms are seeking solutions like Wilson Proforma Tracker to improve efficiency and productivity. "The business environment for law firms is growing increasingly competitive. The most successful firms will be those that use technology to introduce process efficiencies that drive profitability. Implementing a solution like Wilson Proforma Tracker is a low-risk high-reward way for firms to accelerate the work-to-bill-to-collections life cycle," he explains. "We're delighted Bevan Brittan chose our solution to meet this need and that it's delivering improved business services to the firm's stakeholders and clients."



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Learn more about Wilson Proforma Tracker