

CMS

Digitally Transforming Paper-Based Billing Processes with Wilson Proforma Tracker

CMS in the Netherlands is a full-service law firm with 160 lawyers who provide services covering a broad range of practice areas and sector groups. It has offices in Amsterdam, Utrecht, and Brussels and works in partnership with national and international businesses to meet their business objectives, deliver projects, and close deals. As a result of these services, the CMS finance team generates about 1,000 invoices per month.

Prior to the coronavirus pandemic, the firm was content with paper-based proforma processes. But this approach was not feasible once the pandemic required people to work from home. Digitalizing the billing process was on the road map, but not in the short term. However, the pandemic accelerated the plans.

"The ease of sending paper proformas from one office or desk to another had to be abandoned when our lawyers started working from home," says Kees Boer, project manager of financial administration at CMS. "Emailing PDFs or mailing printed invoices to the attorneys' home addresses to be marked up, scanned, and sent back was not a workable solution. We expect a high degree of structure around our billing procedures, and that was no longer

possible. We had to find a digital solution that could be implemented right away with all the functionality we needed."

Choosing Wilson Proforma Tracker software

In the company's search for a solution, Ron Spelt, finance and control manager, became aware of Wilson Proforma Tracker. Spelt had engaged Wilson Allen for Elite 3E services in a previous role and had good experiences. He invited Wilson Allen to demonstrate Wilson Proforma Tracker to the decision makers at CMS, including Boer, COO Barbara Lamberts, and himself.

CMS uses 3E for its practice management system. But after seeing a demo and comparing several solutions, CMS felt that Wilson Proforma Tracker would serve the firm's purposes the best for the long term.

"To my surprise, the functionality in Wilson Proforma Tracker was much more extensive and far better than I had expected," says Boer. "It had a real digital workflow, which is exactly what we had in mind."

For CMS, one of the more significant advantages of Wilson Proforma Tracker is how well it integrates with 3E. But the fact that the solution could be deployed in two phases, with a small initial scope and then a broader expansion, was especially compelling.

Rolling out the software

CMS wanted to have a fully working solution implemented by the end of summer. It started scoping design requirements late last spring and implemented phase one of the software for user acceptance testing by the end



"The ease of sending paper proformas from one office or desk to another had to be abandoned when our lawyers started working from home. ... We had to find a digital solution that could be implemented right away with all the functionality we needed."

Kees Boer,
Project Manager, Financial Administration, CMS

“The functionality in Wilson Proforma Tracker was much more extensive and far better than I had expected. It had a real digital workflow, which is exactly what we had in mind.”

Kees Boer,
Project Manager, Financial Administration, CMS



of August. CMS stuck with a standard configuration since it matched their existing paper workflow in 3E.

A small group of lawyers went live with the software at the beginning of October last year. “We started with a mix of those who prefer to work digitally, some that enjoy working on paper, and some that don’t care,” Boer explains. “The remarkable result was that all of them, without exception, liked the solution.”

After participating in a train-the-trainer session with Wilson Allen staff, the firm trained the first 20 users in small groups. Boer and Spelt held online training sessions, which they recorded to be available for later viewing. “We had them work with live proformas. From the first time they looked at the reviewer screen, they knew what to do,” Boer says. “Within an hour or less, we were able to give people all the information they needed.” From there, CMS continued the rollout firmwide and held training in larger groups.

Boer believes the software’s ease of use accelerated user adoption – as did the effort the attorneys and billing team at CMS put into the rollout. “The software is easy to work with and intuitive to use. But there’s a general feeling that it’s ‘lawyer approved,’” Boer says. “Our people were very enthusiastic. They shared their enthusiasm with their colleagues, which helped to get the rest of the organization on board.”

CMS also thought that Wilson Allen’s people helped the project go smoothly. In particular, the project team members’ understanding of 3E and the chemistry between the two organizations. “We all worked very well together. Very professionally,” says Boer. “Plus, we had no problem explaining to each other what was needed because we shared common knowledge about 3E to communicate.”

All of the CMS billing staff and timekeepers were using Wilson Proforma Tracker within a few months. “We were really very excited and happy,” Boer adds. “I think any firm that uses 3E can easily benefit from the functionality Wilson Proforma Tracker offers.”

Accelerating billing processes to improve realization

One of the advantages of digital processes is that all users can see precisely where a proforma is in the workflow. That visibility helps ensure invoices get processed – and distributed – more quickly. “If a proforma is held up in any stage, you can see where the delay is to reach out and provide assistance or prompt action,” Boer says. “Fewer delays mean we’ll get bills to clients faster. And I believe that the faster you bill, the faster you get paid.”

Another advantage of Wilson Proforma Tracker is that the firm’s lawyers are

timelier with their billing duties. “No lawyer enjoys administrative work,” Boer says. “But they’ve been very enthusiastic about Wilson Proforma Tracker, and that’s the big win, I think.”

Digital proforma processes mean that billers won’t have to decipher and transcribe written notes and can therefore focus on higher-value functions. “They’ll be able to use that time to improve the quality of billing by setting up billing rules instead of having them collected in a portfolio with notes.” Invoicing more quickly and getting the quality of the bill up should help realization as well.

Looking ahead

Most of what CMS needs in terms of functionality is already provided in Wilson Proforma Tracker, but the firm plans to make some adaptations in a phase-two project. In the meantime, the firm will continue to use the software to manage and enhance proforma processes. For example, CMS will use Wilson Proforma Tracker data in analytics about the firm’s billing processes. Management will see who does what – who is the first to process proformas, who is the last, and who does the most write-offs, deferrals, and postponements. “In due course, we will have a lot of data to learn from so we can improve our processes further,” Boer says.

Learn more about Wilson Proforma Tracker.

wilsonallen.com