

Mintz

Transforming from Paper to Paperless Digital Billing with Wilson Proforma Tracker

Mintz is a versatile Am Law 100 firm with over 500 attorneys serving clients worldwide. The firm collaborates across disciplines to deliver exceptional legal strategies that help clients navigate shifting industry challenges. Mintz attorneys advise business leaders, entrepreneurs, and investors on pivotal deals, disputes, and regulatory matters.

The firm works within four core practice areas – Transactional, Intellectual Property, Litigation & Investigations, and Regulatory & Advisory – and serves industries including the Life Sciences; Health Care; Technology; Insurance & Financial Services; Energy & Sustainability; Sports & Entertainment; Real Estate, Construction & Infrastructure; Retail & Consumer Products; and Education & Nonprofit sectors. Mintz is strategically located to meet its clients' needs with offices in Boston, Los Angeles, New York, San Diego, San Francisco, Washington, DC, and London.

The firm had been preparing proformas as most firms have traditionally done – printing out hard copies, getting them to attorneys who marked them up, editing the bills in the practice management solution, and producing invoices. The firm's 18 Billing Specialists process anywhere from 12,000 to 14,000 proformas each month. That's a lot of

paper – and a lot of manual effort. The billing team had little insight into where proformas were in the review process.

Mintz was ready to make a change. It sought a solution to keep up with its volume of invoices more efficiently while streamlining processes. In addition, Mintz wanted to stay competitive with other firms. Many lateral attorneys who joined the firm had experience with the paperless process and expected to continue using it. Mintz wanted to give the right tools to its more technology-savvy attorneys who like to do things electronically. Visibility was a key driver as well, as Brian Mantarian, CFO at Mintz, explains.

"We were looking to get an easier way to figure out the status of a proforma, how long the process is taking, if multiple edits are going back and forth, and where the bottlenecks are," Mantarian says. "We were looking for a way to get that automated."

Choosing Wilson Proforma Tracker software

Mintz invited Wilson Allen to demonstrate Wilson Proforma Tracker software. Seeing the smooth integration between Wilson Proforma Tracker and their Business Management Solution, Elite 3E, was a significant factor in their decision.

"We wanted to find a tool to close gaps and inefficiencies in our billing processes. We easily identified how Wilson Proforma Tracker could close those gaps; the efficiencies are incorporated within different areas of the product," says Ronald Gagne, Manager of Billing at Mintz. "The reporting component was compelling to us as well to better identify where we needed to take action to turn bills around more quickly."

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Not only was the software a winner, but Mintz also had peace of mind choosing a solution from Wilson Allen. The firm has long relied on Wilson Allen to help it make the best use of technology. Wilson Allen's consulting services teams have supported the firm through many Elite software implementations, upgrades, and customisations, which have resulted in positive experiences for Mintz.

"We've been working with Wilson since our firm implemented Elite Enterprise in 1993," says Laura Mastrianni, Financial Systems Manager and Internal Project Manager for the Wilson Proforma Tracker implementation at Mintz. "We have had a wonderful experience working with many folks on the Wilson team over the years."

Achieving a smooth and successful implementation

Mintz has achieved one of the fastest Wilson Proforma Tracker implementations and rollouts to date. The project started with a solution design phase in October. In mid-November, the team began development testing, and the implementation went into a production environment in December. The firm started with a small pilot and then rolled the software out to all assistants in January. "Because Wilson Proforma Tracker is so easy to use, it's that much easier to get it adopted," Gagne adds.

Once the system went live – it stayed that way. There were few tweaks after it went into production.

Dan Belter, Technical Implementation Manager at Wilson Allen, attributes much of the credit for the rollout speed to the Mintz team. "What they had going for them was Ron. He has a lot of legal experience, and he knew how he wanted us to configure the firm's billing processes, especially related to group billing. We worked hand-in-hand with Mintz to get group billing configured the way it needed to work," Belter adds. "Plus, the whole billing team was extraordinarily thorough in their testing. There were no anomalies from development into production, which we typically do see. They did an amazing job testing the system."

The admiration appears to be mutual, based on feedback from the Mintz team. "I've managed many financial software implementations for a variety of different products. For Wilson Proforma Tracker, it's clear that the people behind the product know what they're doing," says Mastrianni. "The implementation was very smooth and successful."

Gagne concurs. "The support we received and their excitement to get the product loaded and working, especially when we were onboarding and getting the product up and running, mirrored our own. They were there for us."

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Financial Systems Manager
Mintz



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CFO
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Expanding the rollout through a pandemic

Mintz had successfully rolled out Wilson Proforma Tracker to the firm’s billing assistants and had started to train attorneys on its use when COVID-19 caused the firm to switch to remote operations. The firm didn’t miss a beat and shifted from in-person to remote training. It was able to onboard 40 additional people right away to continue its billing processes even though people were working from home. “It was awesome, actually,” says Mastrianni. “I’ve been in meetings with some 3E user groups, and people were struggling when COVID hit.

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Some firms were sending people into the office. They had to go in to print out all of the paper and ship it to each person’s home.”

Gagne agrees that it couldn’t have timed its rollout of Wilson Proforma Tracker any better. “We didn’t need to send anyone into the office – whether it was for Wilson Proforma Tracker or 3E,” he says. “Wilson Proforma Tracker has created efficiencies by helping to streamline and organise the work our assistants and billing specialists do.”

Experiencing the benefits of digital transformation

All of Mintz’s billing specialists and assistants are now using Wilson Proforma Tracker, which means the firm edits and processes all proformas through the software as well. “Where we see immediate value is from the front office standpoint,” Gagne says. “We’re seeing about a 35% to 40% reduction in time spent editing bills.”

Even after absorbing more business and adding additional laterals in the last six months, the firm completes 90% of its bills by the middle of the month. In the past, it completed bills in the third or fourth week. “We’re seeing efficiency gains shortening turnaround time to complete billing. We can do more work in fewer hours with Wilson Proforma Tracker,” Gagne adds.

The firm has also experienced a reduction in write-downs with Wilson Proforma Tracker. "With Wilson Proforma Tracker, we've automated the approval process for write-offs," says Mantarian. "Either a section manager or I have to approve a certain dollar level of write-offs, which prompts attorneys to be more cognizant of what they write off, bringing them to more acceptable levels. Realisation is improving as a result."

Overall, implementing Wilson Proforma Tracker has been a win for Mintz. "We love the product," says Gagne. "Wilson Proforma Tracker has everything that we needed. The way it organises proforma information in one place and integrates with 3E allows you to pull a bill together quickly, instead of having to fumble through paper and look for proformas from this attorney versus that attorney."

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About Wilson Allen

Wilson Allen offers software and services that enable law firms and professional services organisations to enhance business performance.

The company uses relationships with prominent industry partners to apply deep subject-matter expertise that helps firms build stronger relationships, work more efficiently, and run more profitably.

Long recognised as a leader in services for time and billing applications, Wilson Allen has dramatically expanded its breadth of offerings in recent years and now includes:

- Proven consulting services to maximise the return on software investments
- World-class CRM tools and services to help firms identify, win, and keep high-value clients
- Best-of-breed paperless, pre-billing software to help firms work more efficiently
- Innovative BI software and business analytics featuring prebuilt AI and machine-learning models that help firms make smarter business decisions
- Full-service training solutions to speed user adoption and maximise productivity



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