

## CLIENT TESTIMONIAL

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# Seyfarth Shaw

## Implementing Wilson Proforma Tracker to Automate and Visualize Each Stage of the Billing Workflow

With more than 900 lawyers across 16 offices, Seyfarth Shaw LLP provides advisory, litigation, and transactional legal services to clients worldwide. For 75 years, the firm has upheld a commitment to excellence and innovation, which extends beyond the practice of law to how it runs its business. This includes the technology the firm employs to manage operations, such as its financial systems.

Seyfarth has a large billing team distributed throughout nearly all offices generating a higher-than-average number of proformas and invoices. The firm was on a quest to implement a tool to help the firm's billers and attorneys get invoices out as quickly and efficiently as possible.

### Choosing Wilson Proforma Tracker software

In its search for a solution, Seyfarth's financial systems team, the billing team, its director of finance, and CFO evaluated several options. Ultimately, they selected Wilson Proforma Tracker software. "When we saw a demo of Wilson Proforma Tracker, we really liked the workflow functionality and the visibility it provided for each stage of the proforma process," Moe Ban, financial systems manager at Seyfarth explains. "Plus, it was so straightforward we thought it would be easy to roll out without a lot of handholding."

Not only did Proforma Tracker deliver the functionality and ease of use Seyfarth wanted, but it also offered forward

compatibility with the firm's practice management system. The firm is currently using Elite Enterprise software but will begin its selection process to move to new practice management software soon. Therefore, the chosen solution needed to be compatible with the firm's future system. Since Wilson Proforma Tracker already works with Elite Enterprise and 3E, and integration with Aderant Expert software is planned, it met this criterion.

Seyfarth's prior experiences with Wilson Allen helped solidify the decision to choose Wilson Proforma Tracker. "Wilson Allen helped with our last three Elite Enterprise conversions," Ban adds. "Our experiences through those conversions and other custom development projects have been very positive, so we felt comfortable choosing a vendor we knew and trusted."

### Streamlining the software rollout

Seyfarth selected Wilson Proforma Tracker in January of 2020 and started the solution design phase shortly thereafter. The firm kept customizations

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Financial Systems Manager  
Seyfarth



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Moe Ban, Financial Systems Manager, Seyfarth

to a minimum so it could roll out as quickly as possible. The only functionality it added was status alerts and some custom reporting capabilities.

By March, the software was installed, and testing began. Its first pilot users were live with the software by late April/early May. From there, the firm added users, focusing on one office at a time. For training, Seyfarth provided reference guides and created several short videos to demonstrate different processes. It also offered remote group training via WebEx or Zoom for users as requested.

### **Enabling remote work by digitizing processes**

Because Seyfarth had configured and implemented Wilson Proforma Tracker in early 2020, the work-from-home mandate due to the coronavirus pandemic didn't interfere with its rollout. Quite the opposite. Having digital billing capabilities served as an incentive to accelerate user adoption. “It provided attorneys and billing staff with the ability to transition away from paper

copies of proformas and invoices sooner,” Ban says. “We easily transitioned to Wilson Proforma Tracker even with everyone working out of the office.”

### **Enjoying improved visibility and an automated workflow**

Since implementing Wilson Proforma Tracker, the feedback from attorneys and the billing staff has been positive.

“A top advantage of Wilson Proforma Tracker is that it adds a clear workflow to the proforma process. It gives people a distinct list of items to work on, which makes it clear what is outstanding and what is with someone else,” Ban says. “Gaining this visibility, being able to report on that, and receiving alerts on the status of proformas has helped us streamline proforma processes significantly.”

Other benefits include the firm's attorneys having a higher degree of confidence that their edits to proformas will be made precisely as intended, rather than being misunderstood or misread. It also gives attorneys another opportunity to review

proformas without too much back and forth with the billing group. For the billing group, implementing Wilson Proforma Tracker has enabled the firm to minimize the number of double entries on edits, saving time and effort when preparing invoices.

### **Enjoying a successful, drama-free implementation**

Overall, the project is viewed as a success. Seyfarth was able to roll out Wilson Proforma Tracker without any significant issues or surprises, and the software is functioning as expected. In the sometimes-volatile world of software implementations, that's a good thing.

Ban sees the team at Wilson Allen as instrumental in the success of the software and its rollout at the firm. “The software has been developed by people who clearly understand the proforma process,” Ban adds. “But it's the people at Wilson Allen who helped us move everything along. They're very competent and were great to work with.”

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