



# Allen Matkins

## Data from multiple systems gives attorneys access to insightful information

Prominent Californian law firm, Allen Matkins, has broken down data silos between key line-of-business systems to give lead attorneys rapid visibility into their client accounts.

After developing the proof of concept in-house, the 200-strong attorney firm partnered with Wilson Allen to automate the data connections between systems. The two organizations then worked together to bring the data to life using Microsoft Power BI visualization tools to create live dashboards that aggregate key metrics into easily digestible information screens.

### Circuitous data assembly

Molly Crossland, Marketing Technology Manager at Allen Matkins, conceived the unified dashboard idea to give two newly established client teams a better way to manage their client accounts.

“We wanted to empower them by encompassing key data from our various platforms and presenting it in one place.”

Allen Matkins uses the Aderant financial system, HubSpot for marketing and Interaction for customer relationship management. The firm also subscribes to Manzama for legal research and market insights.

Crossland says the data the attorneys needed to see was siloed within each of these systems. “Because they don’t all talk to each other, finding information involved going into them individually. Attorneys don’t have time to do that.”

“We are delighted with the service from Wilson Allen and beyond thrilled with the results of the dashboard project.”

**Molly Crossland,**  
Marketing Technology Manager, Allen Matkins

As a result, data discovery often fell to marketing, who would reach out to finance and other departments to try and collect the desired information.

“Assembling the data into a coherent picture of recent client activity was a labour-intensive and complex task involving lots of work with error-prone spreadsheets,” says Crossland. “It was difficult to provide the attorneys with a holistic, real-time picture.”

### Visualizing a new approach

After seeing a Power BI demo staged by Wilson Allen, the dashboard idea started to take shape. The firm drew up a wish list of data they wanted, and Crossland began to visualize the result.

“I tested the concept by pulling in data from the systems that had open APIs. I included data from existing spreadsheets and generally experimented with what I thought would be valuable for the attorneys to see in a dashboard.”

She then road tested it with a key attorney on one of the newly formed client teams who was highly enthusiastic.

According to Crossland, using Power BI during the project’s conceptual stage was a breakthrough. The dashboard mock-ups allowed her to create an accurate vision of the end goal.

“After that, it was a matter of choosing the right

development team to do the heavy lifting—to turn the vision into reality. Wilson Allen was a natural fit.”

Wilson Allen’s head of innovation, Greg Murphy, quickly gathered together a list of data points from each system. Senior Director Barry Puddephatt, who had worked on integrating Allen Matkins’ marketing and CRM systems, also weighed in with valuable assistance.

Crossland says the firm wanted to own and control the dashboard environment. “We didn’t want to pay to use someone else’s data extraction tools,” says Crossland. “Wilson Allen understood that and set about connecting all the pieces we needed.”

### Powerful solution with a small footprint

Using Power BI’s zero footprint, all the dashboard information is threaded into the solution without needing a secondary database.

“Previously, if we had attempted this, we would have had to pull the data together into an SQL database,” says Greg Murphy. “This isn’t needed in Power BI. Its agile technology allowed us to focus on the analytical integration of the data in real-time.”

The design is highly flexible. The dashboards can be adjusted and the information customized to address different client needs. Attorneys can see relevant financial information, such as realization, hours worked by practice group, top timekeeper reports, and essential marketing and CRM information.

“The dashboards are great for the attorneys. They display key metrics that allow them to keep a close eye on how a client account is tracking.”

**Molly Crossland,**  
Marketing Technology Manager, Allen Matkins

“They can drill down further to see accounts receivable and work in progress information,” says Crossland. “There is also a marketing page that surfaces information about events clients have attended, newsletters they are signed up to and what email links they may have recently clicked on.”

### Better data, better insight

The dashboards provide attorneys with a powerful snapshot of client activity, says Crossland.

“This type of information was difficult to find before. Now they have interactive data visualizations from multiple data sources at their fingertips. It gives them real-time visibility into how business is tracking and empowers better decision-making.”

Allen Matkins has developed dashboards for its top 20 clients and is rolling them out step-by-step to the relevant attorneys. “There is a pull within the practice to do more of them because the value they offer is immediate and easy to see.”

## Allen Matkins

Allen Matkins, founded in 1977, is a California-based law firm with more than 200 attorneys in Los Angeles, Orange County, San Diego and San Francisco. The firm’s areas of focus include: real estate, construction, land use, environmental, and natural resources; corporate and securities, real estate and commercial finance, bankruptcy, restructurings and creditors’ rights, joint ventures, and tax; labor and employment; and trials, litigation, risk management, and alternative dispute resolution in all of these areas.

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