



BARNES & THORNBURG INNOVATES FOR CLIENT SUCCESS WITH HELP FROM UMBRIA

THE CHALLENGE: DELIVER CLIENT VALUE

Barnes & Thornburg LLP is an AmLaw 100 firm with more than 600 attorneys and other legal professionals serving clients worldwide from 13 offices located in Atlanta, Chicago, Dallas, Delaware, Indiana, Los Angeles, Michigan, Minneapolis, Ohio and Washington, D.C.

In late 2015, upon seeing a marked increase in the number of RFPs received by the firm, Esther Bowers, Director of Client Service Initiatives, and Jared Applegate, Director of Pricing, recognized recurring questions regarding the firm's ability to deliver fee predictability and performing underlying matter management. Rather than responding to these questions on an ad hoc basis, Esther and Jared realized that they needed to

holistically address the firm's delivery of legal services. They endeavored to develop a comprehensive, firm-wide solution incorporating people, process, and technology to drive client value. They saw the connection between improving matter management and delivering fee predictability – and hypothesized both would result in improved profitability to the firm.

PROJECT COMMENCEMENT AND TECHNOLOGY SELECTION

To support their plan, Esther and Jared compiled data from inbound RFPs along with benchmarks on fee arrangements, then included further industry data to complete the business case. Upon presenting it to leadership, they found a stalwart champion in the firm's CMO, Allen Chichester. His enthusiastic support was pivotal in achieving C-suite buy-in, and it was quickly prioritized as a 'front of house' project.

Knowing that technology would play a key role in the success of their project, Jared and Esther spent months researching the market, looking for a system that would provide the core technology platform. They met with numerous software providers and consultants and participated in various industry seminars, narrowing the field and vetting their shortlist with peer counsel.

Ultimately, they selected Prosperoware Umbria to deliver pricing, scoping, and budgeting, and to enable improved matter management for the firm's attorneys. This, in turn, would help them deliver the desired fee predictability for clients and lead to improved matter profitability. Recognizing the value of training, the firm selected specialist consultancy LawVision to help them implement core LPM concepts. They branded this new initiative as "BT ValueWorks™", the firm's proprietary framework of processes working in concert with the Umbria platform to achieve greater client value.

Jared comments: "Umbria had everything we needed and wanted as a core technology. Other platforms we reviewed did not offer the same depth of functionality – they didn't have the ability to drill into detailed timekeeper narratives, including phase and task codes; nor did they offer the ability to manage budgets in real-time, a key component of enabling our attorneys to project manage their matters. We also knew that our clients wanted to see the analytics and data instantly. Umbria displays all this data in a quick, simple, actionable, and accurate way for our attorneys, a huge differentiating factor."

Esther and Jared collaborated, crafted, and implemented policy, positioned and marketed the program internally, and began the roll-out on an office-by-office basis, beginning in early 2016.

THE PROCESS: A STRUCTURED APPROACH TO DEPLOYMENT AND ADOPTION

Traditionally, attorneys have focused on legal strategy and the law; the new norm is a broader focus on the delivery of legal services. Jared comments: "In our firm, lawyers had been creating budgets but, once created, those budgets sat on the corners of their desks, with no actionable way to track them. Clients would ask for progress against the budgets, but there was no mechanism to properly correlate, analyze, or report back. So, we asked, how do we get the budgets off the corner of the desk and help make them actionable? This is what we did, and what Umbria has provided."

The firm's attorneys – including partners and senior partners – were exceptionally receptive to Umbria; it helped

them develop an actionable and systematic approach to delivering work, beyond legal project management.

They quickly adopted Umbria's real-time, informative case management and budget reports to enable them to improve client service by monitoring and measuring results.

From January 2016 through early 2017, participants in the BT ValueWorks program swelled to 125+ attorneys, approximately 20 percent of the firm, all trained on the Umbria platform. For the BT ValueWorks program, the firm relies on eight trainers, four of whom are practicing lawyers.

THE RESULTS: UMBRIA TIES TOGETHER VALUE TO THE CLIENT AND THE FIRM

As of early 2017, Barnes & Thornburg is tracking 502 matter budgets in Umbria which equates to over 10 percent of the firm's total revenue. Impressively, these budgets and this process have already had a measurable impact on the firm's bottom line. Matters that have gone through the full BT ValueWorks approach and through Umbria have seen an increase in overall profit margin.

Jared states: "More than the results, we have an innovative solution in place that differentiates our firm from competitors and is transforming our attorneys into professionals who excel in matter delivery in the new market for legal services. We let clients and prospects know we have and use Umbria. As Barnes & Thornburg continues to develop our competitive, strategic vision, Prosperoware Umbria will help provide an integral part of that."

Allen Chichester concludes: "The early success we have witnessed has been crucial in creating the conditions for change within the firm. It has resulted in a momentum shift toward the adoption of fundamental legal project management principles. Our relationship partners are readily using Umbria's sophisticated pricing and matter management functions. We expect that within five years, the partnership will look back at this program as the single biggest factor in the firm's ongoing success."

