



BALLARD SPAHR IMPLEMENTS UMBRIA: A CLIENT SERVICE GAME CHANGER

YESTERDAY'S SYSTEMS CAN'T MEET TODAY'S CLIENTS' NEEDS

Gone are the days when lawyers billed by the hour, submitted summary invoices, and clients paid—no questions asked. Increasingly, clients choose firms that can deliver predictable fees and better enable them to meet their own budgetary pressures.

This is a complex challenge for most firms, as exemplified by the industry-wide increase in write-offs: a client receives a bill for more than was expected, complains, and this forces the firm to write off fees in a double-lose result: unhappy clients make for unhappy firms. Firms should be in the business of helping their clients by delivering work at or under budget—or clients will take work elsewhere, including in-house.

The internal, legacy systems at most law firms, however, can't support these new client demands. Law firm accounting systems were not designed to provide this information to partners or handle complex fee arrangements. Ballard Spahr, for instance, had developed a series of homegrown solutions to address clients' needs, but these solutions were not connected, and the subsequent inefficiencies of these disconnected systems were becoming untenable to manage.

THE RIGHT INPUTS LEAD TO BETTER OUTPUTS

Client value means transparency in scoping, pricing, budgeting, staffing, efficient management of their legal work and delivering matters at the expected price—and delivering all of this information quickly, at the pace of real time.

"This is complex, challenging work as we have approximately 300 partners, generate up to 100 new matters a day, and our group touches 100% of matters," says Melissa Prince, Chief Client Value Officer, Ballard Spahr.

Ballard Spahr collaborated with technology partner, Prosperoware, to create the innovative, enterprise class technology, Umbria, a client value management solution that helps firms deliver quality matters at the expected price. By creating the "right inputs" and unifying data from key data repositories (such as finance, marketing, KM), Umbria creates a business data engine Ballard can leverage to improve planning, monitoring, and billing of matters—improving outputs.

"We theorized that fixing the inputs would create better outputs. This is why Umbria is a client service game changer for the firm," Melissa continues.

The benefit of unifying this data is the creation of actionable information that partners can instantly understand and use, influencing their behavior and ensuring the firm can price and staff matters efficiently, deliver at the agreed price under any fee arrangement—and communicate all of this information quickly, in real time, to clients.



UMBRIA ADDRESSES MULTIPLE CHALLENGES, DELIVERS SUBSTANTIVE RESULTS

Umbria went into production in early Q3 2017 and enables Ballard to model, price, budget, manage, track, and report on matters in real time. Umbria integrates directly with Ballard's accounting and billing systems. The firm can then leverage historical data—for instance, from similar prior matters to help determine the cost of a new matter and how it should be staffed—when pricing or opening a new matter.

The system also provides typical matter completion time and the tasks likely to be involved, enabling the firm to create detailed budgets and assumptions and provide clients multiple pricing options. During matter delivery, Ballard attorneys can monitor real-time budget and profitability information while clients can view budget-to-actual information—down to the fee earner and phase or task level.

In this way, Umbria offers a multi-pronged approach that better addresses multiple challenges. Umbria enables partners to provide complete transparency regarding the firm's methodology for pricing, managing, and staffing matters as well as show cost of delivery and fees billed. This encourages and enables clients and firm partners to make more proactive and informed matter management decisions—and has already created substantive results for the firm by decreasing write-offs.

Also, by giving clients real-time access to billing information on those matters, Umbria promotes transparency, enables fee certainty, and delivers critical client communication. All of this helps strengthen client relationships and can be measured through positive client feedback, improved client retention and growth, and increased revenue.

Melissa concludes: "Umbria provides the infrastructure for the relationships we want to cultivate with our clients. It enables our responsiveness, efficiency, and builds remarkable alliances—while also producing tangible results for the firm. There is no other system capturing this comprehensive, deep and relevant information."