

## Integrating time and billing saves time and money.

By Renee Molnar

**Name:**

Ross, Brittain & Schonberg Co.

**Practice:**

Founded in 1991, Ross, Brittain & Schonberg is a 12-attorney firm that represents management on labor law, employment relations and workers' compensation matters with the principle that change in the workplace is inevitable.

**Problem:**

Integrating a time and billing system into the firm's practice without frightening off the tech-challenged attorneys.



# Time to Change

Almost every day there are new technological breakthroughs, new economic factors, shifts in the political climate, and continual additions and revisions to labor and employment laws that impact how our customers – both publicly and privately held companies – manage their businesses. These changes also impact how we, as an insurance defense firm, manage our business.

As recently as 2001, however, we were not taking advantage of the changes in financial management technology that could best solve our main workplace issue: managing the profitability of both our firm and the individual attorneys within it. To do so, we needed a new time and billing system.

With our previous system, we used an outdated approach to financial management. The attorney handwrote his or her time, then passed it off to the billing department to enter into the billing system and download into a Microsoft Excel spreadsheet for analysis. It took a lot of manpower to complete the billing and collections in a timely fashion that way, not to mention analyze the data using our specific billing requirements. We needed to streamline our reporting mechanisms and give our 12 attorneys an easy and much less time-consuming way to enter their own time. Our previous system just was not working.

**What is Out There?**

Choosing a time and billing system can take a lot of time, especially if you do it correctly. To us, that meant evaluating all of the key players in time and billing – ProVantage, Software Technology Inc.'s Tabs3, Juris and Omega Legal – based on what each

system could do for us. The evaluation team, which included our Information Technology and accounting departments, asked each vendor several questions:

- Is your billing system integrated with your accounting package?
- How much data can we store in your system?
- Is your system flexible enough to manage and produce the very intricate and unique reports we need?
- Does it already provide features X, Y and Z, or can you add these features for us?
- How much does it cost and what is included in the base product?
- Is customer service included? What type of support will we receive if problems in the system occur?

We sat in the conference room comparing every systems' functionality. Many features were similar, but one key difference was customer service. A product might look like it has the ideal features, but what good is it if you can't get quality, live support from the vendor to help resolve issues immediately?

**The Clear Winner**

For us, Omega Legal ([www.omegalegal.com](http://www.omegalegal.com)) won hands down. For a reasonable investment, it offered nearly every feature we were looking for in one integrated system, including ease of use and flexible reporting capabilities. It also offered the best customer service available. We could tell Omega understood our unique billing and reporting requirements, and its flexible configuration allowed us to limit any customizations to only the most unique.

We also were confident that Omega Legal would be easy for our attorneys – even the most technologically challenged – to quickly learn. We knew this choice would free the attorneys and their paralegals for more productive, billable work.

To make sure we were billing for all of the copies we printed, we chose a print and copy tracking system from CopiTrak Worldwide that integrates with Omega. CopiTrak ([www.copitrak.com](http://www.copitrak.com)) records the number of prints or copies made and downloads that information into Omega each night. Billing for printing and copying used to be manual, and many clients were not getting billed. Now, we capture everything because users can't use the printer or copier unless they are logged in under a specific client.

### Slow and Easy

Once we chose Omega, the next decision was how to implement it without falling behind in our billing. We could tell from the demonstrations it would be easy to implement, and we only would need minimal training to get all 12 attorneys and their paralegals up and running. However, we were a little concerned some of our attorneys would balk at an instant transition, so we

decided to take it slowly. It proved to be an ideal solution for us.

For the initial set up, we allowed Omega to access our system over the Internet through Symantec's pcAnywhere, which we already had installed. Omega set up the entire system that way, and uses it anytime we need an upgrade or support.

We first began training the paralegals to enter time, and then we trained our most tech-savvy attorneys. Before we knew it, all 12 attorneys were entering their own time.

Our decision to complete the transition slowly was successful. We had very few issues, and when we did have any, our Omega manager accessed our system through pcAnywhere and either solved the problem herself or walked us through it.

### The Benefits Aboard

The moment we completed the transition to Omega, the benefits were obvious. The most earth-shattering benefit for us was when we reduced the equivalent of one full-time employee in accounting within eight months. You can't beat that return on investment.

This reduction in staff was possible because our billing, collections and

reporting mechanisms now are streamlined – the ultimate goal in moving to a time and billing program. We now have a much more efficient way to manage our business. For example:

- Time always is up-to-date and in the system for easy billing and analysis. We run pre-bills on the first business day of each month for fast turnaround, billing and collections. In addition to specialized reports for our clients, we easily can analyze how we are doing in certain practice areas and how productive and profitable individual attorneys are.
- Attorneys input their own time, reducing the time they spend reviewing drafts and making edits.
- A payment can be posted to a specific invoice number. If a client pays the February bill and skips January, Omega seamlessly allows us to apply the bill to February, not January.
- Hard costs are easier to manage because we automatically can post the cost to the client's bill. **loc**

*Renee Molnar has nearly 20 years of experience in the law firm environment, working in all areas, including secretarial, billing, IT, administrative and management.*

As reviewed in the April/May 2005 issue of LAW OFFICE COMPUTING ▲ [www.lawofficecomputing.com](http://www.lawofficecomputing.com)

#### JOAN COSLEY, CONTROLLER MORGENSTEIN + JUBELIRER

*A 30-attorney firm based in San Francisco, Morgenstein & Jubelirer specializes in business litigation, toxic tort, employment law, asbestos defense, construction defect and antitrust.*

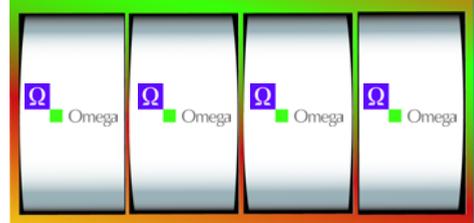
**Time and billing software:** Omega Legal Systems ([www.omegallegal.com](http://www.omegallegal.com)).

**Why did the firm choose this software?** It was the most economical full-featured legal accounting system available.

**How much did it cost?** About \$60,000, including training.

**What was the implementation process like?** Our Information Technology consultant staged the server, and Omega loaded and configured the software. Since Omega is a completely integrated system, we implemented all areas immediately – accounts receivable, accounts payable, time and billing, and general ledger. We originally installed it in 1996, and had a trainer on site for three or four days. Omega handled the data conversion from really ugly, space-delimited text files.

**What are the key benefits?** Attorney statistics are accurate. Accounting data is current and accounts receivable balance to the general ledger. I am able to download data and provide whatever information is needed. I can control user access and permissions and setup special menus for classes of users.



**Is there anything you would change about the software?** I sometimes wish all canned reports would telescope to provide the degree of detail I want at the moment, be it summary or detail.

**Has using this software increased your firm's efficiency?** Definitely. Clients demand more each year, and we have been able to respond without adding to our staff.

**What features do you find most useful?** Advanced look-ups (search any field within the system), attorney statistics and client statistics. It's very fast and efficient. Best of all, Omega runs on a Windows 2000 server and the accounting staff handles upgrades without consultants.

**Did your firm switch to your current program from another time and billing package?** We used CSS (before it became ProVantage) running on a Unix box. It required a huge investment in IT resources to keep it running. It was faster and cheaper to change the system than upgrade it.