



Practice Management Solution

# Legal360

## (Practice Management Solution)

Enabling law firm transformation





## Enabling law firm transformation

“I do not buy into the deep-rooted belief that the legal business is ‘different’. Like other businesses, we need to adopt best practice in our approach to pricing, matter management, resource planning and so on. “  
These are the words of the finance director of a multinational law firm.<sup>1</sup> Increasingly, it’s the view of many law firms, determined to eliminate the well-recognised disconnect between client expectations and traditional firm practices. But in a digital age, a determination to change isn’t enough. Without the right technologies for business management, you simply can’t get to where you need to be - certainly not fast enough to keep up as change continues at a pace.



<sup>1</sup> From LAWTECH magazine, August 2015, p30-31: Introducing enterprise resource planning

## Enter Legal360 (Practice Management Solution)

Unlike traditional practice management or financial management systems, Legal360 (Practice Management Solution) is:

**An ERP solution.** Which means that it:

- Joins the dots across your business, transforming operational efficiency and strategic insight by unifying the management of work, finances and people in a single solution.
- Rationalises your IT application estate for significant ongoing savings.

**Cloud-native.** We've chosen to build Legal360 (Practice Management Solution) on the Microsoft Dynamics 365 for Finance and Operations platform to provide you:

- Agility in a fast-paced, highly mobile world.
- Scalability and flexibility when practice or market conditions change.
- Reduced IT spend - cutting the hassle and cost of looking after hardware and provisioning back-ups.
- All the protection and benefits of the latest features and technology developments.
- Familiarity, security and many other benefits automatically inherited from the Microsoft platform.





## Benefits of the Legal360 (Practice Management Solution) technology platform

Legal360 (Practice Management Solution) puts the familiarity, scale and investment power of Microsoft into your hands, so you can leverage the world's best business management practices. With enhancements for the legal sector, it's a package that's hard to beat.

### Value for everyone

By using a single system for everything from time recording and matter management to financial, HR and procurement management, you'll transform your firm's ability to:



**Engage clients** by delivering value as they understand it. See page 7 for more on how Legal360 (Practice Management Solution) helps your firm deliver a distinctive client experience.



**Optimize operations** for everyone from IT to senior partners; across different practices and borders; and at every stage of work. See page 9 for more on how Legal360 (Practice Management Solution) helps your firm be more efficient and effective.



**Empower employees** by giving them greater control over their productivity and career development. See page 11 for more on how Legal360 (Practice Management Solution) helps you attract and retain the right people.



**Gain insight** with visibility and intelligence: across the business and down to individual practice areas, offices, clients, matters and employees. See page 12 for more on how Legal360 (Practice Management Solution) helps your firm support its decisions.

Microsoft has partnered with SAGlobal as its only strategic Independent Software Vendor (ISV) for the development of a legal sector solution on the Dynamics 365 for Finance and Operations platform.



Practice Management Solution

# Data and analytics



## Workplaces



## Insightful analytics



## Microsoft power BI

# Productivity



## Enter and manage time



## Enter and manage expenses



## Manage clients and matters



## Manage and approve invoices

## Financials



## Manage cash and bank operations



## Perform general accounting and reporting



## Process accounts payable and expenses



## Manage accounts receivable and collections



## Perform planning and budgeting

## Human capital



Hire to retire



## Manage recruitment



## Manage leave and absence



## Manage compensation and benefits



## Manage performance



Microsoft  
Dynamics 365





## Legal360 (Practice Management Solution)

Together, the Legal360 (Practice Management Solution) cloud solution and the Microsoft platform deliver a unique range of benefits:



### **Designed for growth and development, a result of:**

- The scalability and accessibility of cloud technology, letting you respond quickly to the needs of special projects, new offices, a merger... any organizational or market change, small or large.
- Microsoft's significant ongoing investment, with platform improvements available immediately - freeing you from the cycle of continually falling behind and needing costly major upgrades to get important new capabilities.



### **Greater productivity** for system users and IT, because of:

- Mobile working - secure system access from any device in any location.
- The familiar Microsoft interface and user experience.
- Automatic integration with other Microsoft products.



### **Lower cost of ownership of IT:**

- No hardware to acquire, maintain, manage or refresh.
- A true software-as-a-service model that aligns operational cost with system use - and (because it's ERP) lets you retire multiple legacy applications.



### **Greater security...**

...than firms can typically achieve in-house, thanks to Microsoft's well-defined security development lifecycle, dedicated security operations, encryption of all data and connections by default, clear privacy policy, and comprehensive compliance framework and roadmap.

# Deliver a distinctive client experience

We know that enterprise clients are generally confident about the quality of legal knowledge demonstrated by their law firms. But we also know that this is not the only - nor necessarily the most important - criterion by which they judge you.<sup>2</sup>



## Voice of your client

Our research shows that enterprise clients (general counsel and heads of lines of business) are looking for:

- **Value.** Clients don't want 'the best possible legal diagnosis'; they want business solutions that are 'good enough', built on deeper relationships, insight into their business, and an appreciation of their cost pressures.
- **Visibility.** 75% of those interviewed feel they get little help from law firms in understanding (for example) their case lifecycles, spend, trends in work performed for them, or the work's impact.
- **Certainty and predictability about scope of work, costs and timelines.** Recognising that legal work can be variable, clients want law firms to respond, not with wildly unpredictable costs (or shifting scopes of work that make 'fixed fees' really variable), but by managing variability and risk across their portfolio.

Here's how Legal360 (Practice Management Solution) can help you respond to these concerns.

## Value and visibility

Legal360 (Practice Management Solution) is not a magic wand for building deeper client relationships. But it is designed to help you see the bigger picture across a client portfolio, respond to clients' cost pressures, and be transparent with them about the work you are undertaking for them.

It does this, firstly, by giving everyone visibility: from partners to junior lawyers, paralegals, legal secretaries, the finance department, procurement, and others who support client work.

Because not everyone needs the same information or functionality, access to Legal360 (Practice Management Solution) is via configurable workspaces for different roles. Permissions-handling is particularly powerful and flexible, so you really can give every employee precisely the information they need to serve clients more efficiently, answer client queries promptly, and analyse the bigger picture (as relevant).

You can also build client portals through Legal360 (Practice Management Solution), giving clients the power to track the progress of their matters directly, and 'self-service' access to reports on their activity with your firm. This can be a compelling service differentiator and of significant value to clients.

Then there's the unification of HR and matter management in Legal360 (Practice Management Solution), which makes all of the skills across your firm visible when scoping or costing work. So you can easily assign the right people to the right work, to meet client expectations for a better balance of quality and cost.

## Certainty and predictability (and flexibility too)

The volume of bill reversals that law firms routinely tell us about suggests consistent failures to:

- Accurately and consistently plan and budget for work.

<sup>2</sup> Based on research by the University of Cambridge Judge Business School: Amplifying the voice of the client in law firms, 2017.



- Reliably complete work to plan (or at least deal openly with scope creep as it happens, rather than after the fact).
- Invoice promptly and accurately.

With Legal360 (Practice Management Solution) you can easily analyse prior work, then adapt matter planning templates to achieve better accuracy when planning, budgeting and quoting for similar work. The powerful Task Recorder helps you specify best-practice procedures more clearly and consistently. And with time and expense recording in the same system, progress against timescales and budgets can be tracked in near real-time without any special effort.

Accurate invoicing and reporting follows as a matter of course. With errors and unpleasant surprises vanishingly rare, so too are the disputes that cause bill reversals, payment delays and client disappointment.

And behind the scenes, you can measure and analyse service delivery to develop a choice of pricing models that work for clients without increasing risk for the firm. Legal360 (Practice Management Solution) supports different fee structures, e-billing and reporting formats as a matter of course, including the flexibility to have multiple different fee and invoicing setups per client.



<sup>2</sup> Based on research by the University of Cambridge Judge Business School: Amplifying the voice of the client in law firms, 2017.



## Optimise operations for greater efficiency and effectiveness

Time is money - and with so much functionality, flexibility and control in one system, Legal360 (Practice Management Solution) saves a lot of both. It simplifies work for everyone and avoids sources of error. It is highly configurable for different needs; but also helps you standardise on your chosen configurations.



### Optimized IT

The more of Legal360 (Practice Management Solution)'s range of functions your firm uses, the more you minimise the need for IT to manage different systems, integrate them, or maintain integrations as vendors develop their products in different directions.

If integration is necessary (for example, if you continue to use an existing expense-recording system before ultimately migrating to expense management in Legal360 (Practice Management Solution)), then it is through the use of open APIs: avoiding as much complexity as possible.

Legal360 (Practice Management Solution) also automatically maintains built-in compatibility with standard Microsoft Office products, freeing IT from any special effort to support work across these systems.

### Optimized matter management

When Fieldfisher decided to adopt an ERP approach to practice management, a key reason was the ability to review and improve core business processes.

This is your firm's chance to clearly define the stages and steps in on-boarding new clients, quoting for work, opening matters (or other work items), allocating resources to them, recording time and expenses against them, and invoicing for them.

The templates and processes you specify may differ to suit the needs of different types of work and different parts of the world. But the underlying principles are that:

- Legal360 (Practice Management Solution) is designed to free your legal professionals and support staff to focus on their work, by minimising the time they spend on managing work processes.

Examples include:

- Ready access to standard matter templates and data on prior work, to help with planning and budgeting.
- Visibility of skills and their availability across the firm, with the ability to allocate the right people to the right work 'at the touch of a button'.
- Automated creation of system guides for inexperienced staff (dramatically improving training).
- Incredibly flexible and easily managed options for fee structures, billing formats and invoice generation.
- Easy near real-time tracking of matter progress (actual) against what has been scoped, budgeted and quoted for.
- Configurable, role-specific dashboards built directly into individual workspaces: hugely simplifying people's ability to track their own progress and the progress of work they're involved in.

- And when your needs change, as they inevitably will, Legal360 (Practice Management Solution) will help you change the way you work (no more relying on compromising workarounds).

## Optimized financial management

Legal360 (Practice Management Solution) readily supports different tax and accounting requirements across your global enterprise. You can configure different accounting templates, year-ends (and so on) for different legal entities, each of which can be locked down as the standard for specific users without having to build customised permissions or security levels.

You can also cater for any e-billing requirements, configure expense management with all of the functionality you'd expect, and manage procurement-to-payment as a single, end-to-end process within the one system.

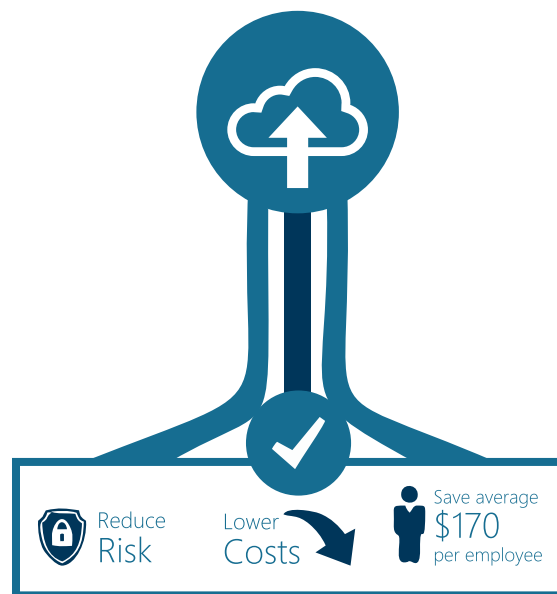
And Legal360 (Practice Management Solution) really comes into its own in delivering business intelligence on financial and business performance metrics.

## Management by exception

With Legal360 (Practice Management Solution), people are much more likely to follow best practices by default. And with data duplication and re-keying eliminated or significantly reduced, Legal360 (Practice Management Solution) becomes a trusted, single source of truth for everyone in the firm. High levels of process automation also reduce the scope for errors.

All of which means that exceptions really will be exceptional (and they'll also be readily visible, because you can define conditions that trigger alerts). So instead of continually fighting fires, you can focus on managing the firm for success.

Moving ERP to the cloud can reduce unplanned application downtime by 98%.



*"With ERP you can mitigate risk of errors and failure to reduce operational costs by an average of \$170 per employee per year."*

IDC infographic: Gaining the ERP Edge, 2015.

## Attract and retain the right people

Legal360 (Practice Management Solution) gives every employee better control over their own productivity and career advancement. And takes the guesswork out of identifying the skills your firm needs to achieve its ambitions.



If law is a people-led business...

...why do so many law firms lack good visibility of the skills available across their firm?

Unlike traditional HR systems, Legal360 (Practice Management Solution) addresses this issue by unifying HR and core business management (after all, it's an enterprise resource planning solution). So you can give HR and line managers direct visibility of the actual performance of individuals and teams, making it easier to propose training, career development or recruitment as necessary.

Equally importantly, because law is a people-led business, Legal360 (Practice Management Solution) empowers employees to make their own qualifications, experience and competencies visible to those who can use them when planning work.

Beyond the enormous operational value of being able to allocate the right people to the right work, think about what this means for your firm's development:

- With visibility of the teams on past work and your current talent pool, you can protect valuable customer relationships before key people leave.
- You can also ask the question: 'how are we positioned to win and deliver this type of work?' With powerful human capital analysis on tap, Legal360 (Practice Management Solution) is as much a tool for strategic scenario planning as for HR process management.

### Personal efficiency and productivity

Legal360 (Practice Management Solution) also helps you meet employee expectations of a modern workplace. Imagine being able to tell the most desirable candidates:

- "We believe in giving our people the information they need to deliver for clients. You'll have clear visibility of everything we do that is relevant to your role."
- "You'll be able to track your own performance against business objectives, and take up training opportunities to grow in your role."
- "You'll use a powerful and intuitive system to manage the processes of your work."
- "And you can access the system through any device, so you can be productive wherever you are."



## Gain insight to support your decisions

Do you dream about powerful analytics and visualizations that let you drill right down to individual transactions?

Do you wish it took a fraction of the effort to convey key metrics to those who need them?



Legal360 (Practice Management Solution) makes these wishes - and more - come true. firm needs to achieve its ambitions.



## Why settle for less?

With Legal360 (Practice Management Solution) we invite you to think big; because anyone familiar with Microsoft Power BI will tell you that game-changing business intelligence is at the heart of Microsoft's roadmap: to the direct benefit of Legal360 (Practice Management Solution).

## Game-changing intelligence

The more business functions you manage through Legal360 (Practice Management Solution), the more you have a single source of reliable, accurate data from which to draw trustworthy insight. If your firm has struggled to report on client, matter or, indeed, firm profitability - that can finally change.

Here are just some of the 'everyday' Legal360 (Practice Management Solution) features that can already change the game for you: Complete access to all data

The data is captured in near real-time and stored without aggregation. With superfast processing, you can finally:

- Analyse at any level: from firm-wide to individual offices, practice areas, teams, employees, clients, matters, or task's.
- Employ predictive analytics and forecasting.

And data-crunching never interferes with ongoing system use.

## Intuitive data visualization, embedded in workspaces

We can build specific dashboards into the configurable workspaces of specific people. You have full control over who can see what. Do you want certain roles to see work in progress as a matter of course? Or the state of billing, collections, aging, lock-up...? Do you want to promote management by exception through visually compelling alerts? And let people drill down or aggregate up for the further insight they need? Done.

## Available anywhere, on any device

So your people have the information they need at their fingertips, wherever they are.

## Over to you

What could you do with this level of insight? Manage risk rather than fight fires? Understand what offices, practice areas or teams are delivering (or not)? Spot trends and opportunities?

Ultimately, you'll make more informed decisions that are more likely to lead to success.

# Legal360 (Practice Management Solution)

## Drive growth, profitability, a sustainable future

However you look at it - as a client or employee, through operational or strategic eyes - Legal360 (Practice Management Solution) gives law firms the tools to transform the way they work and achieve their objectives:

- Win and retain more clients to grow the business
- Reduce cost and increase efficiency to drive profitability
- Build a high-performing team to create a sustainable future

If these are your ambitions, let's talk.



Let's talk



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