



*We just completed the study to optimize our billing and collection department operations. During the process Todd Gerstein found tangible improvements to accelerate our cash cycle and to improve service we provide to our partners. The project deliverable evaluated our processes and included detailed “change management” recommendations. It is high-impact consulting – done in a quick amount of time – so that you can immediately move from analysis to the “get it done and fix it” stage.*

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## Project Sheet

# Law Firm Billing and Collection Department Optimization

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### **Optimization**

An act, process, or methodology of making something as fully perfect, functional, or effective as possible.

- Merriam-Webster Dictionary

### **Business Process Management**

Significant gains are often realized by modifying business processes to make them more efficient, improve output quality, enhance service levels or lower operating costs. Of course, not all processes should be redesigned. Our experience in business process redesign and process innovation has immersed us in the *best practices* in use at major law firm sites.

*Best practices* are processes refined through experience and iteration and generate the most value for the least cost. Law firms can achieve *best practices* organically through multiple trial and error iterations, or adopt *best practices* from outside sources based on their success in similar settings. We urge you to put our experience to work for you.

### **Project Details**

The project objective is to evaluate your firm’s billing and collection procedures with the intent to identify “points of optimization” that the firm can implement to improve operations. The firm, by committing to “business process optimization,” positions itself to experience business and economic benefits.



## OPTIMIZATION

*An act, process, or methodology of making something as fully perfect, functional, or effective as possible.*

*- Merriam-Webster*

Optimization creates both business and economic benefits.

### **Business Benefits:**

- Eliminate back office errors;
- Improve operational efficiencies;
- Reduce days to bill and collect;
- Strengthen data integrity with uniform input & processing rules;
- Enhance back office service levels; and
- Advance client service with regards to billing.

### **Economic Benefits:**

- Reduction in overtime to support inefficient processes;
- Reduction in time spent to produce management information; and
- Acceleration of revenue by reducing days to bill and collect.

### **Project Methodology**

Interviews will be conducted with representatives impacted or responsible for billing and collections. Partner interviews typically take between 45-60 minutes. The interviews will be structured with a predefined set of questions, but not too structured to restrict the free flow of conversation.

Possible interview groups include:

- The firm's billing and collection manager(s) to understand the existing process and to uncover optimization points;
- The firm's managing partner and the partner-in-charge of billing and collection to garner their perspectives;
- Representatives from the home and local offices (typically the office managing partner, office administrator, and partner) to gather general and geographic input; and/or
- Partner representatives from different practice areas to gather practice area input.



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Interview subjects cover the full range of cash cycle topics including: new client matter intake, engagement management, rate management, cost management, billing guidelines, time entry, costs, pre-bill, billing, tracking, electronic billing, staffing, and collections.

### ***Project Deliverables***

A PowerPoint presentation will be prepared for the firm. The deliverable will include:

- Assessment of the current methods;
- Identification of processes that are inefficient; and
- Optimization recommendations.

The presentation will be presented to the firm along with in-depth discussions regarding the findings

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We welcome your interest. For additional information, please contact Todd Gerstein.