

From Law Practice to Best Practice

How One U.K. Firm Became a Technology Trendsetter

BY MALCOLM PITT

With roots dating to 1866, Ince & Co. is one of the most respected law firms in the United Kingdom. Our company has one of the world's largest shipping and trade practices, and it also handles aviation matters, business and finance, commercial disputes, insurance and energy. Ince & Co. has more than 200 attorneys worldwide, with offices in London, Paris, Hamburg, Le Havre, Piraeus, Dubai, Shanghai, Hong Kong and Singapore.

With a firm of this size, delivering accurate, timely information to stakeholders is critical to our operations. Attorneys need to keep track of their billable costs, and managers need to know about accounts receivable and credit limits. Having offices overseas also means that we need to have information available in multiple currencies. And all of it needs to be professionally presented, in a format that's easy for everyone to read and understand.

This presented a significant challenge for Ince & Co. We use Thomson Elite for our time and billing system, which does a good job of tracking those functions. But we wanted to update our billing system and make greater use of the data held in the Elite databases. We were spending a significant amount of time at the end of each month generating accounts receivable and dozens of other reports. We wanted a way to extract the data directly from Elite; organize it into a readable, professional-looking format; and deliver the reports electronically to our timekeepers and administrators worldwide on an ongoing basis.

In an effort to address these challenges, we purchased Whitehill Enterprise, a software package developed by Whitehill Technologies Inc. Enterprise can extract data from the Elite system, and then use custom-built templates to format the data into a readable report or invoice. Once formatted, Enterprise can render the document as a Microsoft Word file for printing and mailing, a Web page for delivery over the firm's intranet, an Adobe Acrobat PDF for e-mailing, or any other format we need to create.

We purchased Whitehill Enterprise through Tikit, a U.K.-based reseller. David Gallagher at Tikit was responsible for the initial installation and for training Ince & Co. staff. The installation went smoothly, and our plan was to have Tikit train a designated staff member to design and format our own templates. Due to staff changes, however, we asked Gallagher to help us in developing a function within Whitehill whereby we could generate and deliver reports directly to the desktops of our fee earners and managers 24 hours a day, 7 days a week. This allowed us to implement the system and reap the rewards from Whitehill much more quickly.

Gallagher designed numerous templates for our billing guide packs, work in process, accounts receivable, statements and business group statistics, among others. After that, time-consuming month-end reports



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Malcolm Pitt, *Finance Manager*, INCE & CO.

became a thing of the past. Instead, Whitehill Enterprise extracts data from Elite every night, refreshes the reports automatically, formats the data using the custom-designed templates and delivers the reports on our company intranet or via e-mail. The reports are available to all fee earners and designated management worldwide, from the time our far-East offices come online each morning. The added bonus is that all reports are in the recipients' required currencies.

Whitehill Enterprise has allowed us to exploit our Elite databases more fully, while maintaining data integrity. We had tables written by third parties that we were unable to update, some of which became obsolete after upgrades as we progressed to a full Elite Globalization Release system. Now we use Whitehill's structured query language feature, which gives us full control over the structure, financial integrity and layout of the data in all of our reports (both printed and electronic), resulting in a more professional presentation. We can create new reports as needed, or change the layout of existing ones quickly and easily.

The system also lets our worldwide staff request additional reports via our intranet or Webview, and have them delivered directly to their desktops at any time. Our attorneys benefit from having 26 to 30 personalized reports refreshed each night on the intranet and regular e-mails delivering the right information at the right time. These alert busy partners and lawyers to items such as upcoming time and credit limits, billing prompts and other key performance indicators.

We're now preparing to use Whitehill Enterprise for invoicing our clients. We were unable to use the basic Elite-generated invoices and have been using Word-generated documents for our final invoices – a slow

and costly process that requires billing clerks and secretaries to produce the invoices manually. We're now finalizing global invoice templates using Whitehill Enterprise version 5.5.6. We also intend to use it to further develop our submission of invoices and financial information electronically in compliance with LEDES (the Legal Electronic Data Exchange Standard), now that international codes allowing for the U.K.'s value-added tax to be incorporated may be adopted.

From a return-on-investment perspective, the project paid for itself in less than three months. We've found Whitehill Enterprise to be a good, solid, back-office workhorse. No one ever notices it until an exception occurs, and when it does, it always sends an alert to let us know something's wrong. It gives us peace of mind to know that we can rely on it, without having to constantly intervene manually to keep it up and running.

The most gratifying part of the experience has been the improvement in our overall efficiency. We've saved money on overtime, paper and printing costs; and the daily reports mean that our fee earners can spend less time on administration and more time on generating income. It's worked very well for us, and indications are that other firms are now utilizing Whitehill for the creation and electronic transmission of reports.

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