

AMLAW 200 FIRM UPGRADE COST RECOVERY SOLUTION TO ACHIEVE NEW LEVELS OF EFFICIENCY

Sedgwick, Detert, Moran & Arnold LLP has long been recognized for its ability to achieve outstanding results for its clients around the world. Now in its 75th year, and with more than 400 attorneys in 13 offices around the world, the firm was once again looking to set the bar high but this time it was for their own internal processes. The firm needed to upgrade the cost recovery solution in all of their U.S. offices to gain new effi-

very satisfied with it. So I brought Equitrac Professional® Cost Recovery Solutions here which helped. But to take advantage of new features, we knew it was time to upgrade.”

Although Partridge, had a positive experience with Equitrac in the past, she knew that she needed to be objective in her search for new technology and review what other vendors were offering.



ciencies such as import of electronically invoiced expenses, automated report scheduling, greater management of color output and improved support for multi-vendor devices. And they needed to accomplish the transition in as little time and with as little disruption as possible. Sedgwick’s Business Systems Analyst Christine Partridge had a big challenge ahead.

“I’ve been familiar with Equitrac systems for 17-plus years,” Partridge said. “When I came to Sedgwick nine years ago, we had an older product and a lot of the same proprietary problems that other users were having. We had Equitrac at my previous firm, and were

“When we began thinking about the upgrade we did look at competitive products including Copitrak and nQueue,” said Partridge. “What was important was whether they could do the same things we could already accomplish in Equitrac Professional 3 as well as the customized importing that we wanted to add. And would we receive the same type of service and response.”

“I knew service from Equitrac would be excellent,” she continued. “But one of the competitors only had one service tech for our market. Weighing all of that, we realized that they would not do for Sedgwick. Even if products appear to be less expensive, if service is



Organization: Sedgwick, Detert, Moran & Arnold LLP, an international trial and litigation law firm with 400 attorneys serving clients from 13 offices in the U.S. and Europe.

Challenge: To upgrade the cost recovery system in all nine U.S. offices to gain new efficiencies such as import of electronically invoiced expenses, automated report scheduling, greater management of color output and improved support for multi-vendor devices — and to accomplish the transition in as little time and with as little disruption as possible.

Application: Upgrade to Equitrac Professional 5 and deploy TouchPoint Console terminals to capture client-matter codes for billable copies and faxes on connected multifunction devices and simplify entry of miscellaneous disbursements.

Result: Rapid deployment of all software and hardware, with installation completed in all nine offices in just one month. Importing of expenses provides fast and accurate capture of billable expenses, TouchPoint Console simplifies user entry of client-matter codes for copies and faxes and expanded report options provide increased management insight.

Client Comment: “I knew service from Equitrac would be excellent. Our Tier 2 and local Equitrac techs always give their all. I know I can count on them for the excellent service that we’ve come to expect.”

poor you wind up asking the question: why did I choose them?”

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Finding the Perfect Solution

Partridge knew exactly what she was looking for in a new solution. In addition to traditional cost recovery capabilities, her firm needed the ability to:

- Customize the import of electronically invoiced vendor expenses
- Automate the generation of monthly management reports
- Increase control over use of color output
- Seamlessly import electronic invoice details from vendors such as Lexis/Nexis and Westlaw research, FedEx and local couriers, Merrill office and reprographic services, and the firm's calendar application vendor



Partridge was able to achieve all of this and more by upgrading her current Equitrac Professional product to Equitrac Professional 5 with TouchPoint Console® terminals to capture copy, scan and fax charges from the firm's various brands of multifunction devices. The upgrade process was completed and operational in all nine U.S. offices in just over one month.

"The rollout was completed in a timely fashion and it was a good collaborative effort between myself, the tech staff in all our offices, and Equitrac, especially considering there was a lot of customization involved," said Partridge.

Customization of the solution involved mapping vendors' electronic invoice data for import through Equitrac Professional 5 into the firm's CMS billing and accounting system. Additional customization allows manual entry of miscellaneous expense items on a TouchPoint Console dedicated to that task in each office. With approximately 25 different miscellaneous disbursements pre-defined and an additional open miscellaneous field, every billable expense can be allocated to its correct client-matter code.

"The Equitrac system generates a file for each of those costs and they get imported into the CMS financial system every day," said Partridge. "Accounting likes having the information. And it lessens the need for backup because all the detail is there on the client's bill."

Exceeding Expectations

Another Equitrac Professional 5 capability that supports Sedgwick's billing approach is the charging of different rates for color and black and white output. Plus, the Equitrac solution also makes it easy to reduce the use of color. As Partridge explained, "it just takes the touch of a button to change output to black and white from a color machine's default."

Billable phone charges are captured just as easily. Callers enter client-matter codes as part of dialing with the Equitrac Professional 5 Call Accounting module transferring that information to the billing system.

Equitrac's robust reporting capabilities drew particular praise from Partridge.

"What's beautiful about Equitrac Professional 5 is the flexibility of the reporting system. It's excellent," she said. "We depend heavily on Equitrac reports when finance closes out each month. Copy and fax counts from all the devices and telephone extension reports can be output in the requested format, such as Excel and PDF. Report scheduling lets me automate generation of reports for the Directors of Administration in each office."

Since the upgrade, Sedgwick is able to move faster and work smarter. Today, the firm is finding their new technology fits into their existing environment and improves their existing workflow.

"Everyone likes the TouchPoint Console. The graphical user interface lets users choose client-matter codes quickly and easily," Said Partridge. "And Equitrac reports are helping directors make better decisions on our equipment — do we even need a device in a particular location, for example. Now I'm ready to start moving more things over to users. I can give the tools to the directors and their assistants to generate their own reports, such as exceptions."

"The Equitrac 5 upgrade has worked out extremely well," said Partridge. "I knew service from Equitrac would be excellent. Our Tier 2 and local Equitrac techs always give their all. I know I can count on them for the excellent service that we've come to expect."