

One Version of the Truth



Headquarters

Washington, DC

Lawyers

500+

Founded

1979

Services

Litigation & Trial, Regulatory & Policy, Transactions & Corporate, Investigations

Business Opportunity

Identify a Business Intelligence solution that provides accurate, timely and relevant information to the firm's lawyers, firm management and support staff in an easy to use format.

Project Overview

- Understand unique requirements of firm
- Data integrity and validation
- Training and targeted rollout to firm

Why Foundation Finance

- Best in class Legal BI provider with over 50+ product installations
- True self-service BI including mobility, admin center, SSRS integration, Outlook integration and intranet/extranet widgets
- Intuitive design and ease of use
- Fast, responsive and scalable

Return On Investment

- Consolidation of multiple systems & reports One version of the truth
- Increased "real-time" visibility in firm's performance
- Reduce number of ad-hoc requests from business managers and attorneys
- Consolidate hundreds of reports into a select few

Business Situation & Challenges

Crowell & Moring LLP is an international law firm with approximately 500 lawyers representing clients in high-stakes litigation and arbitration, regulatory, and transactional matters. The firm is internationally recognized for its representation of Fortune 500 and emerging companies as well as its ongoing commitment to pro bono service, diversity, value-based billing, and legal project management.

Crowell & Moring LLP believe financial reporting and business intelligence are key to a law firm running a successful business. After nearly ten years of offering customized “automated” reports, the Crowell Finance team found itself in a position where hundreds of different reports were being sent out on a regular basis. These reports were inconsistent and inaccurate.

The largest challenge they were facing was a lack of trust in the numbers they were reporting. Another challenge was that the Crowell finance team wasn’t able to focus on doing any analysis. “We spent massive amounts of time just pulling data (i.e. building queries/maintaining manual tables) and chasing our tails by constantly fixing data problems. Some of the data problems were systematic (i.e. the data warehouse nightly build not happening properly) but most of the issues were self-inflicted”, stated Jordan Peterson.

A lack of attention in tracking FTE for new hires/ departures and attorney promotions; poorly labeled reports, poorly built queries/reports all led to bad data being sent out. The result was a Finance team of nearly 10 people not producing any insightful analysis to speak of, much less any meaningful forecasting or raising red flags to firm management.

Why Foundation Finance?

Crowell & Moring’s Management Team decided it was time to find an alternative Business Intelligence solution that better fit their business model and current needs. Crowell needed a solution that would give the firm a one-version-of-the-truth, self-service dashboard that could be rolled out to Partners, Senior Counsel, Firm Management, Business Managers, Secretaries and Finance Staff.

When going through their evaluation process, intuitive design, ease of customization and scalability for a product were key to making their decision. Other key factors included having solution that integrated with their time and billing system, Thomson Reuters Elite Enterprise, Outlook Integration and being mobile-ready so the team could access the application from any mobile device in any location.

Four vendors were interviewed and ultimately, the decision was made to go with Foundation Finance’s Attorney Analytics and Firm Focus applications. What stood out the most was the ease of use, performance and minimal amount of training needed for the applications. “In the end, what made our decision was the intuitive design and ease-of-use of the dashboard. We desperately needed to simplify our reporting and we felt Foundation Finance did just that”, said Jordan Peterson, Financial Planning & Analysis Manager.

“In a matter of a few weeks the dashboard has already begun to save an incredible amount of time. Instead of endlessly building SQL queries for one-off reports, we are now able to focus on firm level analysis, forecasts for hours and collections that have already begun to go to the COO and other firm management.”

Jordan Peterson, Crowell & Moring LLP

How the Product Helped

Foundation Finance's project team consulted with and worked closely with Crowell & Moring to customize their BI application to suit their firm's specific needs and culture. Going with the Foundation Finance Attorney Analytics application removed the need for all of the 'automated' reports being generated each month. Crowell also decided to disable Elite Webview Inquiry so there would be no room for data discrepancies.

One of the main features Crowell & Moring relies on now is checking on collections, billings and hours compared to budget. Also, being able to easily see how much of the business is contingent vs. base is very helpful.

Return on Investment and Future Plans

Crowell & Moring has experienced many benefits as a result of implementing Foundation Finance Attorney Analytics. "In a matter of a few weeks the dashboard has already begun to save an incredible amount of time and money", states Jordan Peterson of Crowell & Moring. "Instead of endlessly building SQL queries for one-off reports, we are now able to focus on firm level analysis, forecasts for hours and collections that have already begun to go to the COO and other firm management."

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Crowell & Moring LLP

Foundation Finance Attorney Analytics has provided a strong level of confidence in the data enabling Crowell & Moring to deliver one version of the truth to their partners and firm management. Prior to implementation the team was generating 100's of reports, many of these were pulling data differently which resulted in numbers that almost never tied.

With Foundation Finance, the attorneys and management now have direct access to reliable and important data. They do not need to rely on finance as much, which has freed up that department to spend time on forecasting and true analysis. Lawyers can access invoices directly from Foundation Finance as they are speaking with clients and can even email invoices directly to clients from the application.



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