

## 5 Steps to Increasing Cash Flow Using SharePoint

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*Special to the Legal*

The financial health of any law firm is greatly affected by the status of collections and the aging status of accounts receivables. Like many firms during the recent economic downturn, Marshall Dennehey Warner Coleman & Goggin, a firm with more than 400 attorneys headquartered in Philadelphia, has experienced an increase in delayed payments by clients.

Because of the attorney-client relationship, attorney participation in the collection effort is key to the success of the overall collection strategy. As a result of interviewing attorneys and accounting personnel, we determined that it was difficult for attorneys to obtain information quickly through disparate systems, and the various user interfaces were confusing. Some paper reports were obsolete before the attorneys had time to review and act upon them.

A new, intuitive web-based system was clearly the only way to proceed. We had been considering Microsoft Sharepoint technologies for some time, and determined it would be the ideal platform for what would ultimately become our accounts receivable portal. We awarded the project to mindSHIFT Technologies, with whom we have collaborated extensively during the past five years on a number of technology initiatives. They are a professional services vendor with comprehensive experience in SharePoint and legal vertical technology solutions.

### CRITICAL STEPS FOR SUCCESS

While there were many aspects of this project, there were five important steps leading to the success of the accounts receivable portal.

- **Workflow process.** During the research and discovery phase of the project, we evaluated and documented the current organizational structure, and determined how it would translate to viewing and acting upon accounts receivables. As a firm with 19 offices in six states, we have a very sophisticated matrixed organization chart that changes often. Therefore, designing SharePoint user roles to match our organization was a complex component of the project, but a critical

step to success. All of the inter-departmental and inter-office relationships came into play as we worked with mindSHIFT to define how invoices would “roll up” so that users in different levels of management and responsibility would see their own AR as well as the AR of the many attorneys under their supervision.

- **Data sources.** Like many large firms, we have multiple systems that store user, client and matter related information, as well as accounts receivable detail. The firm’s “Star\*dataWarehouse” (from Select\*Associates) and SharePoint systems provided the perfect platform to gather and present AR aging information, invoices, collections notes, and contact information in a common web interface, simplifying the attorney’s access to collection information.

- **Communication.** Effective communication between attorneys, accounting and collections personnel was key to the system’s success. It was important to ensure that all personnel contacting a client for collection activities had detail regarding the collection history. We built a communication tool within SharePoint to enable an attorney, when looking at an invoice, to click on a link and send collection notes to the specific accounts receivable coordinator who handles the account. This is a huge time saver, as the correct contact is pre-populated – i.e., the correct contact information automatically appears on the screen based upon the selected client – and the notes become available for future reference when viewing the invoice or matter detail.

Also important was the interaction between IT and the practice department managers during the design phase. We consulted with them and we also worked very closely with accounting and collections personnel.

- **Internal marketing.** We were happy with the tracking, communication and follow-up capabilities that we built into the system. But even with all of that functionality, we wanted to generate enthusiasm to gain buy-in from the attorneys. So we branded the new system with the name “awARE,” and “marketed” the project with internal commercial videos around the announcement and launch.

- **Training.** In order to achieve a win-win situation with full participation, we provided WebEx training to all the users of the system, specific to their role. This included more than 400 attorneys and 60 support staff.

### BRINGING IT ALL TOGETHER

We created the “awARE” launch page that every applicable user sees when he or she logs on to the network. This launch page provides them with an overview of their accounts receivable activity in the broader context of a dashboard that contains useful tools like a bar chart displaying their 60/90/120 AR totals, their hours billed to date for the year, alerts to matters that may be ready for final billing, links to commonly used applications and client guidelines, and much more.

Presented with this useful, accurate, and up-to-date information each morning, the users were motivated to take action on their aging receivables, with no other intervention needed.

Today, just three months after launch, we are already receiving great feedback. While it is too early to review associated business metrics, we are encouraged by the adoption of the portal and look forward to further analysis. From the IT department’s perspective, we achieved our goals with the successful rollout of our first SharePoint system. I see tremendous potential for additional uses of SharePoint here in our organization.

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