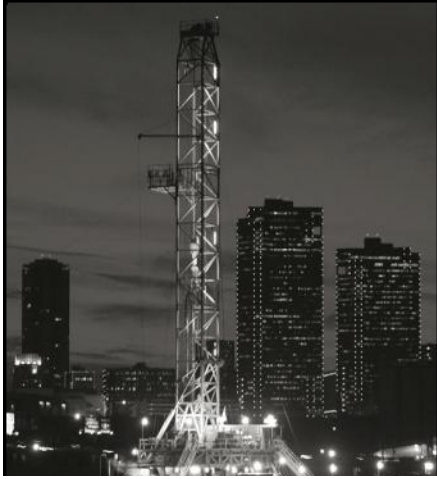


## Energy law firm adopts strategic financial management approach to aid rapid business growth.



### SADLER Law Firm LLP

#### OVERVIEW

**Customer Profile:** Headquartered in Houston, Texas, Sadler Law Firm devotes its multistate practice exclusively to the legal concerns of oil, gas, and energy companies, from title examination to energy transactions and disputes of every size.

**Business Situation:** The firm's 300% growth in a span of two and a half years necessitated improvement and standardization of business processes and policies.

**Solution:** Engaged Juris Professional Services to upgrade their financial management software to Juris® Suite 2.4, perform a massive data clean-up, revise timekeeping policies, and provide comprehensive documentation and user training.

**Product Summary:** Juris® Suite is a powerful collection of financial management solutions designed to enhance your firm's billing, accounting, and reporting performance. Juris Suite consists of Time & Expense and Core Reporting, along with optional add-in Business Intelligence, Budgeting, and Collections modules.

**Juris® Suite implementation resolves growth complications and provides significant improvement to internal processes, managing a 245% increase in billable hours, 259% jump in worked hours, and 244% growth in monthly average billed fees.**

Most law firms would covet achieving even a small fraction of the growth experienced in the last few years by Sadler Law Firm, LLP in Houston.

Fueled by their work with Houston's thriving energy market, the firm was ranked top 9 out of 100 on "Houston's Fast 100 List" for 2012 by the *Houston Business Journal*. Consider the numbers that got them there:

- An employee count that grew from 20 to 80 attorneys, plus 40 support staff, in just 2½ years.
- Office space requirements that doubled, then doubled again in 2 years.
- New satellite offices in Canonsburg, PA and Fort Worth, TX.

#### Business Situation

By no stretch of the imagination did Sadler Law Firm have a problem achieving growth. But as it turned out, they did need help dealing with it: Namely, the need for more sophisticated financial management processes to help them cope with their incredible growth, along with the insights and analytical tools to help them track progress toward their financial goals.

In addition to their need to support an increased number of timekeepers, it behooved the firm to set up standardized procedures to handle increasingly complex billing, accounting, and financial management processes.

To enhance their current financial management procedures and processes and add additional capabilities, Sadler Law Firm reached out to LexisNexis® Juris® Professional Services.

#### Juris Professional Services: "Best Decision We Ever Made"

"An in-depth and comprehensive look into our processes and procedures was required to see how we could streamline and optimize workflow," said

*“We value our Juris Professional Services team as a business partner,” Lanter said. “Their extensive understanding of our law firm’s challenges and need to deliver best-in-class solutions have resulted in a systems management resolution that will continue to benefit our firm into the future”*

– Niki Lanter  
Systems Manager, Sadler Law Firm LLP

Niki Lanter, Systems Manager for Sadler Law Firm. “We engaged the Juris Professional Services team for Juris Project Management, Training, and Implementation services to review our procedures and help us upgrade to Juris® Suite for advanced functionality. Best decision we ever made.”

Since tapping the guidance and expertise of the Juris Professional Services team a year and a half ago, Sadler Law Firm’s improved internal processes have resulted in a major impact on the firm’s bottom line. Among the quantifiable results:

- **A 259% jump in TOTAL YTD WORKED HOURS captured in the first half of 2012**
- **A 245% improvement in TOTAL YTD VALUE OF BILLABLE HOURS recorded in the first half of 2012**
- **A 244% growth in MONTHLY AVERAGE BILLED FEES in a two-year period**
- **A 127% increase in TOTAL INVOICES BILLED in 2012 vs. the same period in 2010**
- **A \$10.2 million increase in YTD TOTAL FEES BILLED as of June 2012**
- **A change in BILLING FREQUENCY OPTIONS from monthly only to monthly, weekly, and on completion**

“These past two years have been pretty awesome for us,” Lanter says. “Juris Suite contributed to significant and positive changes to our situation.”

### **Before: “Potential Revenue was Possibly Seeping Through the Cracks”**

With its greater size and more complex needs, Sadler Law Firm had outgrown its existing systems. New best practices and better data management had to be established to help improve accounting, billing, and reporting performance.

A review of the database revealed defunct, duplicate data and mismatched schedules. “Each and every matter had an ‘Open’ status, and no workflow was in place to complete its lifecycle,” said Niki Lanter. “Everything was in limbo and month-ends were chaotic and stressful.”

Adding to the necessity to improve and standardize business processes and policies, Sadler’s 300% increase in active timekeepers required more

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full-time staff to provide administrative support and help handle workflow.

“New timekeepers were coming on board left and right, and it became increasingly difficult for our Billing Department to keep up with all of the support calls and questions,” said Lanter. “Potential revenue was possibly seeping through the cracks as the firm dealt with growing pains.”

### **Time to Call in the Experts**

On top of everything else, the firm’s basic reporting tools were inhibiting progress and in need of an overhaul. They could no longer rely on Microsoft® Access to produce accurate and detailed supplemental reports, and the only active Juris module they had in place was Client Accounting for entering time and expenses, trust adjustments, and cash receipts.

Although some core reports were available for printout, it became apparent that the firm’s growth had increased its data volume and created a need for more sophisticated functionality and performance management data, analytics, and reports.

Sadler’s leaders knew that to gain the insight needed to measure and improve firm operations and profitability, and to build strong business results, it was time to call in the experts.

### **“The Project Team Helped Us Uncover ... Data That Put Us at Risk”**

“We needed an in-depth review of our financial management process, procedures, and data to identify ways to accommodate and encourage more of this growth, while helping us to make better-informed business decisions,” said Lanter.

To ensure that information in Sadler’s data store was accurate and complete before initiating new financial management solutions, Sadler tapped the expert guidance of their designated Juris team to upgrade to Juris Suite, then institute a massive data cleanup project.

“The project team helped us uncover erroneous, missing, and conflicting data that put us at risk. Then, through concerted efforts and coordination, we moved forward with establishing a standard nomenclature, and new Fee Schedules, Practice Classes and Text Codes were added to the data tables,” said Lanter.

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## “Juris Suite Turned Our Old-Fashioned Reporting Model on Its Head.”

Sadler’s reporting procedures also received a major upgrade with their new Juris Suite Reporting module, which allowed them to take advantage of Juris Custom Reporting features as well.

“Juris Suite turned our old-fashioned reporting model on its head,” said Lanter. “Now select individuals in the firm can access in real time exactly what information they want, how they want to see it, and when they want to see it.”

In addition to more accurate and timely reporting, Sadler Law Firm has realized a significant decrease in time spent producing reports. “There’s a key set of reports that used to take us five days to produce. Now it takes us five hours,” said Lanter.

The goal of enhancing their billing, accounting, and financial management infrastructure for improved efficiencies and profitability was met with resounding success. Improved billing procedures, better timekeeping policies, a more systematic new hire process, and comprehensive documentation and user training all helped position the firm for sustainable, streamlined operations.

“We couldn’t be more pleased with the outcome of the Juris Professional Services team’s efforts, conducive to the firm’s implementation of best practices, to help us reach optimal financial performance,” said Lanter.

### Next Steps

In 2012, Sadler solicited the expertise of the Juris Professional Services team once again for new projects, and to complete an upgrade to the newest version of Juris Suite.

In 2013, Sadler Law Firm plans to move their accounting and financial reporting from QuickBooks® over to Juris Suite, as well as take advantage of additional Juris Suite modules – such as Budgeting, Collections, and Dashboard Reporting – to better track the business’ key performance indicators.

“We value our Juris Professional Services team as a business partner,” Lanter said. “Their extensive understanding of our law firm’s challenges and need to deliver best-in-class solutions have resulted in a systems management resolution that will continue to benefit our firm into the future.”

- [Read about other LexisNexis Law Firm Practice Management customer successes.](#)
- [To learn more about Sadler Law Firm, LLP, visit \[www.sadlerlaw.com\]\(http://www.sadlerlaw.com\).](#)

For more information about Juris software, please call **888.562.3203**.

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## About LexisNexis

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