Case Study | Fieldfisher

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"The goal of the firm was to find a paperless solution that would automate the routing and approval workflow process for expense reports and invoices and enforce the firm's expense policies."

INDUSTRY: Legal   EMPLOYEES: 500+   PRODUCT: **EXPENSE** and **INVOICE**

Automating the Workflow Process

Fieldfisher had a manual routing and approval workflow process for its expense reports and invoices that spanned across multiple offices and locations. The paper-driven process led to delays in reimbursing expenses and holdups in getting invoices onto matter files. Tracking paper forms was difficult to manage and could lead to duplication of paperwork, which cost time and money to track the multiple submissions and then correct the errors.

The firm's goal was to find a paperless solution that would automate the routing and approval workflow process for expense reports and invoices, enforce the firm's expense policies and accelerate the approval time. It also wanted the ability to easily change routing rules and firm policies internally as new steps and procedures were added to the routing and approval processes. Fieldfisher was also looking for quicker turnaround from the time expenses were incurred to the time the expenses were reimbursed to keep both the employees and the finance department happy.

Why Chrome River?

Sarah Wilkinson, finance director at the time and Ian Le Masurier, financial controller made up the team that was involved in the decision to select Chrome River EXPENSE to automate the firm's expense reporting process. But after Chrome River released its INVOICE module, Managing Partner Michael Chissick became

Company Profile

Fieldfisher is a European law firm with market leading practices in many of the world's most dynamic sectors including Energy, Financial Services, Government & Public Services, Hotels & Leisure, Life Sciences, Media, Telecoms and Technology. In addition, they have a Serious Injury practice with a strong reputation for working with claimants in medical negligence cases. The company has more than 500 lawyers working with large businesses like Pearson, Vodafone, BP, Citigroup and Accenture, but also with private wealth and social enterprises as trusted advisers, providing highly commercial advice based on an in-depth understanding of the markets in which they compete. The firm has offices in Brussels, Hamburg, Paris, London, Munich, Manchester, Shanghai and Palo Alto.

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involved and championed the project because he realized that Chrome River's expense reporting and invoice management suite met the firm's goals of eliminating paper, identifying approval bottlenecks, and being on the cutting edge of technology.

Prior to making a decision, the team evaluated all of the major suppliers in the expense management market along with trying to create its own workflow tool. They had multiple comprehensive demonstrations and some very informative site visits, which ultimately made Chrome River the clear standout choice. In the end, Fieldfisher felt confident in the selection of Chrome River because of its deep understanding of the legal industry and its excellent knowledge of the Thomson Reuters Elite practice management system. Chrome River also provided a UK-based partner, Opes Consulting, which made the integration between Chrome River and the Thomson Reuters Elite practice management system seamless.

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Goal

Find an easy-to-use, paperless solution that saves time and money by automating the manual approval and routing workflow process for expense reporting and invoice processing across multiple offices.

Why Chrome River?

Chrome River's deep understanding of the legal market and comprehensive knowledge of the Thomson Reuters Elite practice management system.

The Rollout

The rollout of Chrome River was conducted in phases, with EXPENSE being implemented first followed by INVOICE. The finance team actively promoted the launch of Chrome River with regular email updates to all users. The firm held group training sessions for the lead secretaries (super users) and offered "at your desk" training for partners and fee earners. All users were provided with a training manual for reference.

During the EXPENSE implementation, the finance team dual-posted expenses for two months to test that all the business and routing rules were working as they wanted. Then, the firm setup two pilot groups that used

EXPENSE for one month before it was rolled out to the entire firm.

After the successful rollout of EXPENSE, the firm released INVOICE to three pilot groups for two months: its Manchester office; one fee-earning group; and one business services department. Then, INVOICE was rolled out firm-wide in early 2014. The user feedback for both products was positive from the onset.

Fieldfisher feels that Chrome River is a fantastic, easy to use product. There were no challenges with training and implementation because Chrome River is very intuitive.

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Real Benefits

Prior to Chrome River, Fieldfisher was manually routing paper expense reports and invoices for approval. This process was error-prone since the paperwork could be duplicated, resulting in errors that lost time and money.

Through Chrome River's flexible and configurable "Business Rules Engine," the firm was able to incorporate its approval routing process and firm expense policies into the software. By automating the workflow process, real benefits were realized by eliminating duplicate paperwork, paper, identifying and eliminating bottlenecks in the expense and invoice approval process, and eliminating the time and costs that were associated with a manual approval and routing workflow process.

The firm's fee earners are finding tangible benefits via Chrome River's mobile capabilities. They found that approving expenses and invoices through their email saves time, as well as allowing them to approve expenses

Benefits

Eliminate duplicate paperwork, go paperless, identify bottlenecks in the expense and invoice approval process, and eliminate the time and costs that were associated with a manual approval and routing workflow process.

whilst offsite. A benefit that makes the secretaries' lives easier is their ability to track the progress of expenses online instead of digging through paperwork and trying to track down approvers to find out the status of an expense.

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Goal Met

"The system has met the firm's goal of eliminating the cost of manually routing paper forms for approval by multiple people in multiple offices. And, the implementation of Chrome River has met a goal of the managing partner by placing the firm on the cutting edge of technology."

Working with Chrome River

Throughout the implementation, Fieldfisher had weekly calls with its project managers, along with daily email exchanges to maintain communication and to keep the project on track. Because of the excellent implementation that Chrome River provides, the firm was able to get started on the right foot from the beginning. The firm is keen on its ability to change business and routing rules and add new steps when needed for both EXPENSE and INVOICE.

The firm likes that it's easy to submit support cases and reports that they have received very speedy responses and turnaround time. When the firm asks a question or raises an issue, the approach of the Chrome River project managers and the Help Desk is always to ask the firm how they can help to resolve the issue, which Fieldfisher finds especially refreshing.

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What Fieldfisher likes best about working with Chrome River is that there always seems to be a solution available for anything that arises. It also loves that the use and support of the system is incredibly user friendly.

Life after Implementation

Fieldfisher enjoys the many benefits of Chrome River EXPENSE and INVOICE. Chrome River has solved many issues for the firm. The system has met the firm's goal of eliminating the cost of manually routing paper forms for approval by multiple people in multiple offices. Chrome River has also helped the staff identify bottlenecks in the approval process, which has allowed them to adjust these processes to become more operationally efficient.