

A largest US law firm designed & developed a **Budget Alerts System** to provide better customer experience via **matter management**

Customer Profile:

The customer is one of the largest US Law Firms and lobbying group with offices in Southeastern United States and Washington D.C. For more than 120 years, they have built a reputation for achieving results for their clients on a wide range of legal matters. While providing legal services is the focus, it is how they delivered that sets them apart. Their goal is to provide their clients with more than what they have come to expect from a law firm.

Business Situation:

Promoting efficiency and guiding clients through intelligent knowledge management is a priority for the customer. Adoption, understanding and application of technology plays a critical role in providing more than what clients expect from a law firm. Customer has 3 different systems to manage budgets – Simple Budget, Budget Designer and Budget Manager that are used by their internal users like Attorneys and Finance Managers. Simple Budget and Budget Designer systems are SharePoint application with MS SQL backend. Budget Manager is based on Aderant Expert software. There is no mechanism in these application to setup alerts for users get notifications. Customer wanted a Budget Alerts System that will allow their internal users/attorneys to setup various alerts on these budget systems

Key requirements include

- The primary objective is to develop a Budget Alerts System that would allow users to setup and manage alerts for various budget systems.
- This intranet based system needs to monitor financial data and send Email alerts to users when an alert condition is met.

WinWire Solution:

WinWire SharePoint architects, BI architects and Governance experts worked closely with IT & Business teams and provided solution by leveraging a platform that enables attorneys to.

- Access the application in their Intranet
- View all alerts setup by them on the dashboard
- Add new alerts and modify/delete existing alerts
- Receive Email notifications for the alerts setup
- Designed flexible information architecture which made content easily searchable and can accommodate ever expanding /changing organization structure
- Implemented well thought out Governance strategy which enabled IT and Business to work together with the objective of making platform successful and manageable
- Designed and developed the application with intuitive UI/UX on SharePoint 2010 and SQL backend with SSIS packages and Stored Procedures for processing data
- **Technologies Used:** SharePoint 2010, SSIS, SQL

Alert Level	Portfolio	Client	Matter	Phase/Event Code	Alert Type	Rule	Alert Sent
Matter	-	1701 Island Home Drive, Development of 1701 Isla-	-	-	Percentage	100% of Budget	Yes
Matter	-	East Metro Corridor Comm/Right of Way Services (25-	-	-	Milestone	20.00 Hours	No
Portfolio	Tellus Operating Group, LI-	-	-	-	Milestone	\$120.00	Yes
Portfolio	Empire Petroleum Partner-	-	-	-	Milestone	\$100.00	Yes
Matter	-	CLARK ATLANTA UNIVERS Title IX Compliance-Phase-	-	-	Milestone	\$1000.00 in Week	No
Portfolio	Atrium Corporation (2927-	-	-	-	Milestone	\$2222.00	Yes
Portfolio	Computer Sciences Corpo-	-	-	-	Percentage	50% of \$2345.00	Yes
Portfolio	Dominion Raintree Generi-	-	-	-	Milestone	\$234.00	Yes
Event Code	-	East Metro Corridor Comm/Right of Way Services (25;Test Data E0004_Event	-	-	Percentage	100% of Budget	No
Portfolio	Austin Bridge and Road, L-	-	-	-	Milestone	\$2323.00	Yes

Benefits:

- Attorneys seamlessly and securely accessed the platform from within the intranet portal
- Attorneys were able to setup alerts for various clients/matters from different system on one application
- Easily and continuously monitor actuals Vs. budgets allocated for a Client/Matter by receiving Email alerts to take necessary action
- Able to see Alerts from Simple Budget Application and easily managed alerts

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