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California Law Firm Dowling Aaron Is Transforming and Modernizing Its Prebilling Process

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Dowling Aaron Incorporated is a law firm dedicated to excellence and client service since its founding in 1977. Headquartered in Fresno, CA with several office locations throughout the state, Dowling Aaron consists of 47 attorneys, 55 staff members and is continuously growing.

Since 2015, Dowling Aaron has used Orion Law Management's Financial and Practice Management software to help achieve greater efficiency in its timekeeping and accounting functions. However, the firm was still hindered by an antiquated, paper-based prebill processing workflow.

Prebilling is a monthly process where law firms generate invoice drafts based on timekeeper entries. The attorneys then review the prebills for accuracy and make adjustments before the approved invoices are sent out to clients.

Prebilling is centralized, with the firm's Fresno headquarters handling everything for all five Dowling Aaron offices. The prebill process was entirely paper-based, sometimes requiring a week or more to complete a single monthly billing cycle. Once the time entries were complete, the accounting department created and printed out the prebills (invoice drafts) and passed them to the attorneys responsible for reviewing these prebills. These billing/responsible attorneys then handwrote their changes on the paper bills. Sometimes the notations were confusing, and often handwriting styles were difficult to decipher. For satellite offices, Fresno emailed prebills to those attorneys who then printed them out and edited them by hand. Attorneys would then scan the paper back in, and email the manually annotated bills back to Fresno.

Occasionally, time entries of new associates required a lot of

edits due to the learning curve, resulting in reruns and reprints of voluminous amounts of prebills. There was a considerable duplication of effort as the prebills were circulated from attorney to attorney. In paper form, it wasn't always clear how extensive the edits would become as the prebill was passed along. Also, a lot of monitoring was required to keep track of where the paper was throughout the process. The overall inefficiency and very linear nature of prebilling was less than ideal. The firm needed to find a better approach.

Orion's ePrebill Manager was the solution the firm was looking for. It allows corrections to prebills to be tracked and applied in real time, with a one-click acceptance and approval process. Further, by distributing prebills electronically, attorneys can see the edits made by others, the overall net effect of write-downs, and how these

affect the realization of both the working timekeepers and the client overall, in real time.

At Dowling Aaron, some prebills are reviewed by multiple partners before the final invoice is created. Orion's ePrebill incorporates this effortlessly by enabling a "pass-to" feature along with a note by the billing/responsible attorney. Orion's ePrebill software fully integrates with Orion's original desktop, as well as the iOrion mobile solution, which the firm has been using for over four years. Being highly motivated to overcome the limitations of a paper-based prebilling process, the firm enthusiastically volunteered to be a beta test site for Orion's ePrebill software.

Initially, a self-contained group of 8-10 people at the firm were selected — a mixture of attorneys and other timekeepers who could test Orion's ePrebill with actual accounting content. The Orion team was onsite for the installation, headed up by Project Manager Kevin Harris, who installed the software in a few short hours. The installation went very smoothly. As with any

new software, there were a few things to note upon usage. For example, duplicate email notifications were being sent out to attorneys who were not involved on select matters. We quickly addressed this with the Orion team members, who were very attentive and on top of the issue. The problem was resolved with minimal downtime.

Attorneys and staff members who use Orion's ePrebill Manager at Dowling Aaron thoroughly appreciate the time it saves them, the ease of use and convenience it provides. They can see prebill edits in real time and are no longer carrying stacks of paper around the office or emailing prebills from office to office. The ePrebill Manager does everything electronically which is much more convenient, and there is no longer an issue with illegible handwriting from the attorneys because they use the software. There are fewer reprinting/rerun requests and less time is spent editing entries.

The ultimate goal is to eventually expand the use of Orion's ePrebill Manager to the entire firm, including attorneys in the satellite offices. There is still some resistance from attorneys who are used to the paper-based approach, but the firm is optimistic that the efficiency of the technology will attract more people to try Orion's ePrebill Manager.

Hopefully in the near future, even the greatest rainmakers' desks will be clear because stacks of paper prebills will have been rendered obsolete by Orion's ePrebill Manager. The Orion ePrebill Manager has helped Dowling Aaron to speed-up billing, speed-up cash flow, and move money into the firm faster. As the firm continues to modernize its operations, there is confidence that this trend will continue, and Dowling Aaron's bottom line will be optimized by the benefits, too.



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