



Driving Down Costs with Intelligent Reporting Tools at Simpson & Marwick



SIMPSON & MARWICK SOLICITORS

● ABOUT PULSION

Pulsion Technology is an established IT company which has been working within the UK Legal Sector for many years. Our solutions and services are uniquely adapted to meet the needs of legal firms large and small. We are experienced in working with, and providing integration around, established legal IT systems including Visual Files, Lawsoft and Elite. Some of our key offerings include case management, integration across back office IT systems, management reporting and intranets/extranets.

“Effectively Pulsion has enabled a one stop shop approach to financial reporting. In short, it brings the selected financial data together into a single view. Historically this was available over several separate reports which were time consuming to produce and analyse.”

John Haugh ~ Finance Manager

● THE BUSINESS CHALLENGE

Simpson & Marwick is a firm of solicitors specialising in civil litigation from their offices across Scotland. The firm uses the Elite accounting and time management system, which works well for them in terms of accounting and invoicing functions. There was a requirement to view and analyse large quantities of data by different criteria in order to streamline the billing process. However, extracting financial data was a time consuming task. Also, there was no mechanism to quickly achieve a consolidated view of the data.

● POSITIVE OUTCOMES

The project itself was completed within a very short timeframe and provided immediate benefits to Simpson & Marwick. Bill Oliver, IT Manager, comments on the impact the solution has made. “Since the project has gone live we have had a fantastic response from the finance department. In addition to the functionality of the Elite system, the team can now view all financial and invoicing related data in one area and can view this data in a number of formats. This is something they just couldn’t do easily before.”

“Like the majority of IT projects, the underlying driver is to increase efficiencies and the profitability of the company. The finance department can now easily focus on areas of the business where there are large amounts of unbilled work or where there are slow billing cycles. Effectively, they now spend less time gathering data and more time using the data to make key business decisions and focus on the profitability across the business.”





● LOW COST ~ HIGH IMPACT

The introduction of the solution is providing benefits and making life easier right across the practice. The fact that core data can be easily extracted into applications such as Word or Excel, means that the Finance Department or Senior Partners can obtain various visual representations of data. Analysing year-on-year financial performance and producing future business plans can be achieved much more efficiently. Having all data in one report rather than comparing data from numerous lengthy reports should also increase confidence in data accuracy.

"Pulsion has delivered a flexible management reporting solution which has added significant value to Simpson & Marwick and in particular, to our finance function. The Pulsion Consultants quickly grasped the requirements and completed the project on-time and to budget, which we were more than satisfied with."

Bill Oliver ~ IT Manager

KEY BENEFITS

- Fast production of management reports
- Vastly improved presentation of billing and financial information
- Improved presentation of data should allow for easier tracking and management of financial performance
- Extremely user friendly and intuitive - requires virtually no IT technical support
- Ad hoc reports can be quickly and easily created
- Easy extraction of data to Word, Excel, PDF and more
- Enhanced integration with Elite accounting and time management system





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● EASING ACCESS TO MANAGEMENT INFORMATION

The solution has delivered complete visibility of chargeable matter financial information and unbilled exposure levels across all open matters. Moreover, through the use of varying selection criteria the data can be further interrogated. Reports can be produced in various formats, delivering the unbilled exposure across any number of the following parameters:

- partner, fee earner, manager
- matter number
- client
- accounts receivable totals
- unbilled costs
- deposit account total
- trust/client account total
- last timesheet, bill and cost dates available