

Electronic Billing and Law Firm Management: Managing Legal Expenses and Strengthening Collaborative Relationships with Defense Counsel



WESTFIELD
INSURANCE

Sharing Knowledge. Building Trust.®

“We selected CT TyMetrix not only because it is an end-to-end solution that satisfied all of our requirements, but most importantly because we felt that CT TyMetrix could deliver on what it promised.”

Westfield Insurance – providing commercial and personal insurance and surety services to customers in 27 states for more than 156 years - launched an electronic invoicing and collaborative litigation management initiative to support its claims management process.

Westfield’s goals were to increase efficiencies in managing the receipt and review of invoices, to create a matter management platform and to foster a collaborative environment with its firms. The specific goals for the initiative were to:

- Eliminate manually intensive paper reviews that required several “touches” by Westfield employees
- Utilize a technological approach to foster genuine partnerships with its defense firms in a collaborative environment, resulting in optimal outcomes
- Capture qualitative law firm information, including the allocation of various timekeeper-related resources
- Analyze practice patterns across firms in order to effectively staff matters, identify appropriate activities, evaluate the time spent on those activities and measure law firm performance

Several Options

“There were several electronic billing applications available, but we wanted to go beyond e-billing itself,” said Dan Winkler, Director-Claims Legal Support Services for Westfield Insurance. “Our primary requirements included not only that the tool streamline the submission and



review of invoices, but also that it aggregate financial invoice information, allowing for budgeting and analyses. To accomplish our additional goal of strengthening our partnership with outside counsel,” Winkler continued, “the solution also had to incorporate robust collaborative tools.” The CT TyMetrix application includes the features and functionality that Westfield needs to accomplish its objectives. “What made CT TyMetrix the most attractive solution,” added Winkler, “is that it includes functionality for matter assignment, case assessment, collaborative budget creation and approval, and aggregation of information for counsel evaluation through outside counsel ‘report cards’ and data analysis.”

Westfield researched potential partners that could implement an e-billing and matter management solution. The company selected

“We selected CT TyMetrix not only because it is an end-to-end solution that satisfied all of our requirements, but most importantly because we felt that CT TyMetrix could deliver on what it promised,” continued Winkler. “CT TyMetrix has an established track record of serving the nation’s largest insurers and brand-name corporate law departments. They also have a strong financial track record in the industry. Their reputation was and remains very important to us.”

Smooth Implementation

“CT TyMetrix teamed with our internal project implementation team and followed a rigorous implementation plan, meeting every milestone, including the training of our claims professionals in a single week.” Winkler said. “The internal response to the system was very strong,” continued Winkler. “We were

roster, which included gathering initial law firm data and answering their questions through the CT TyMetrix Help Desk.

Mark Lane, a partner with the Pittsburgh law firm of Dell, Moser, Lane & Loughney, a highly regarded firm on Westfield’s counsel roster advised that the firm was pleased with the implementation and was excited about future partnership opportunities with Westfield that the system will help support.

“We were very apprehensive about the change to electronic billing and matter management but the move went very well and our administrative staff has advised that the new approach is much easier and efficient to work with,” said Lane. “We view this as an opportunity to gain efficiencies both from the necessary management of our administrative and file processes as well as in the feedback received from our performance measurements.”

“We were very apprehensive about the change to electronic billing and matter management but the move went very well and our administrative staff has advised that the new approach is much easier and efficient to work with.”

“Two factors that greatly minimized the impact of our initiative on our law firm partners was the support provided to the firms by CT TyMetrix and the fact that the law firms only needed Internet access to use the CT TyMetrix web-based system,” commented Winkler.

CT TyMetrix as its solution provider based on their industry reputation, financial standing, strong customer base and their law-firm facing collaborative communication tools.

successful in easily incorporating the system into our work processes.”

CT TyMetrix additionally managed the registration process for the law firms on Westfield’s approved

Streamlined Processes and Advanced Decision Making Tools

Moving to CT TyMetrix has allowed Westfield to employ a two-level invoice review in which

each invoice is reviewed by the claims handler responsible for the underlying file and an experienced in-house attorney. "Since routing the invoice to a second reviewer merely requires a single key stroke, we can now easily put two levels of expertise on an invoice," continued Winkler. "The first review is by the claims professional who knows the file and can evaluate the timeliness and appropriateness of the work performed. The second review is completed by a Westfield attorney who can evaluate the appropriateness of the time-to-work product ratio and staffing choices."

Westfield's claims professionals now accept assessments and budgets - which law firms are asked to complete - electronically through the CT TyMetrix system, enabling tracking and sorting capabilities that were more difficult in a paper-based system. "Creating a budget and assessment at the onset of the matter, and in collaboration with outside law firms, aligns the 'internal' and 'external' teams," said Winkler. "This early alignment allows for an action plan and strategy to be developed, which increases the likelihood of a successful resolution, thereby improving outcomes and gaining efficiencies."

Additionally, Westfield now electronically captures subjective performance data through the use of a "Counsel Report Card" in CT TyMetrix that evaluates firms' relative performance and effectiveness. Westfield uses report card ratings in three

categories: 1) knowledge/skill, 2) file management, and 3) service. That subjective information, which

we are pleased with our success to date and the reception that we have received from our firms."

"The functionality in the CT TyMetrix system has helped us advance our core strategy of partnering with our law firms, and we are pleased with our success to date and the reception that we have received from our firms."

is captured in the system by the lead file handler, is married with system data to promote a holistic evaluation process. The evaluation process compares firms in terms of timeliness, responsiveness, work quality and case evaluation accuracy. Using that information, Westfield is strongly positioned to engage its firms in detailed discussions to promote improvement in targeted areas, ultimately leading to the end goals of optimum results and best business practice identification. This process allows law firms to have the opportunity to demonstrate their performance and improvement through measurable metrics.

For Westfield, the CT TyMetrix technology platform is a vehicle to foster an open, informed dialogue with outside counsel from matter assignment, through disposition, and finally to law firm performance evaluations. Westfield uses a very progressive model for law firm partnering, built on the early formulation of a mutually advantageous strategy. Winkler notes that, "The functionality in the CT TyMetrix system has helped us advance our core strategy of partnering with our law firms, and

"Westfield's implementation and use of the system confirmed their commitment to work hand in hand with their firms for the betterment of both parties," said Tim James, managing partner of Toledo, Ohio based Ritter, Robinson, McCready & James - also a Westfield approved firm. "We always strive to obtain information that will make us better lawyers in order to achieve the best results possible and this approach provides us with exactly those kinds of opportunities."

CT TyMetrix tools and processes have helped Westfield define "best business practices" and "best business partners." Through the use of the CT TyMetrix system, Westfield Insurance is creating qualitative performance standards to improve its financial results and enhance its relationship management strategy with its law firms.

For more information on CT TyMetrix, please access www.cttymetrix.com or call (860) 549-8795.