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www.wkelmsolutions.com/legalview-billanalyzer

Over 75% of respondents indicated that their guidelines make outside counsel's invoices "very easy" to audit for compliance.

Less than one-third of respondents update guidelines annually, and guidelines rarely include emerging topics such as diversity and inclusion, or data security.

Only 31% of respondents are completely satisfied with outside counsel's compliance with their guidelines.

When responding to non-compliance...

- 38% reduce payment
- 38% send an automated notification to the law firm via e-billing for each violation
- 28% raise their assessment of compliance in an annual review

60% also indicated experiencing at least some degree of inconsistency in compliance among different firms.

36% of respondents do not know who takes responsibility for overseeing compliance with their guidelines at each firm.

Few are successful in using guidelines strategically. Most surveyed have billing guidelines in place and yet no respondents are completely satisfied with outside counsel's compliance.

Only one-third of respondents indicate that legal employees know the content of guidelines well or very well.

Nearly three-quarters of respondents require formal sign-off from outside counsel.

Half of respondents indicated they alter guidelines based on outside counsel feedback.

Guidelines Design

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Corporate legal departments and insurers are now more than ever looking for actionable insights into outside counsel management. While many have billing and staffing guidelines in place, there is room for improvement. This is evidenced by the findings of the survey, which show that.

- Guidelines are not consistently applied across all law firms.
- Compliance and enforcement policies are not always followed.
- There is a lack of communication and feedback mechanisms between law firms and their clients.

Unlock Insights into Outside Counsel Billing and Staffing Guidelines

Gartner, in partnership with Wolters Kluwer ELM Solutions, created the Outside Counsel Billing and Staff Guidelines survey, focusing on three key areas: guidelines design, compliance and enforcement, and maintenance and management. Key highlights from the survey are outlined below.

When it comes to effectively using guidelines, where do you stand?

- 50% determined the effectiveness of their guidelines through feedback from outside counsel.
- 35% determined the effectiveness through feedback from inside counsel.
- 25% determined the effectiveness through feedback from their internal clients.
- 10% determined the effectiveness through feedback from outside clients.

Primary Objectives in Implementing Billing and Staffing Guidelines:

- Control costs
- Ensure basic compliance with our processes
- Create consistency across relationships with outside counsel
- Make it easier to manage outside counsel
- Define and ensure work quality

Compliance and Enforcement

- Only 31% of respondents indicated that their guidelines make outside counsel's invoices "very easy" to audit for compliance.
- 28% lower overall risk when using guidelines.
- 28% lower claim denials
- 28% lower their assessment of compliance in an annual review

Maintenance and Management

- Only 6% of respondents are completely satisfied with their total outside counsel compliance.
- 36% of respondents indicated they are satisfied with their outside counsel compliance.
- 60% of respondents indicated that their guidelines are very easy to audit for compliance.

Bringing Findings into Focus

Here's some ways to further the use of your guidelines:

- Choose your metrics thoughtfully
- Use prior approval provisions strategically to force communication at critical points in the development of the matter
- Present trends and metrics to the leadership team
- Provide more real-time metrics to improve performance
- Let your teams know that their feedback is valued and used in the ongoing improvement of the guidelines

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