

CASE STUDY



Phillips Lytle:

Less Paper, Easier Expenses

Aderant

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Challenges:

Phillips Lytle, LLP is a North American firm with nine offices in the United States and Canada and more than 350 employees, including nearly 200 fee earners. The firm, which has been in business since 1834, couldn't get their employees' expenses paid in a timely manner.

After the bank that processed expenses via paper checks (located on the first floor of the Buffalo Headquarters) closed, the firm had to start using their payroll vendor to reimburse employee expenses. These expenses had to be keyed in manually and would only be paid once a month. Employees, especially associates, were waiting for weeks on end – sometimes up to six weeks if they missed the monthly cut off. With a crippling payment cycle, Phillips Lytle needed a way to pay their people quicker without being charged by their payroll vendor every step of the way.

Additionally, the process was drowning in paper – all receipts were handled manually and had to be kept by the two employees the firm had keying in expenses. If a client wanted a hotel receipt, those employees would get tied up in searching through thousands of papers to make a copy for client approval. Employees were continually calling to get paid out of cycle, tying up the entire process across the board, stifling efficiency throughout the team.

Solution:

Phillips Lytle became paper light. After attending Aderant's annual Momentum conference and seeing the product in action, Jay Cavarello, Controller at Phillips Lytle, envisioned that Expert Expenses would change the way the firm did their expenses. Instead of having to move between multiple applications, Expert Expenses would help to complete their Expert Suite, making for ease of use right from day one.

The firm rolled out the software in four stages. Initially, Cavarello and another employee at the firm formed the first test group, allowing the pair to enter their expenses as they traveled to other offices and then determine how well the process and workflows operated in real time. Twenty individuals were chosen for the pilot group, split across different parts of the firm to achieve the best sample size. Once the pilot group provided their feedback, it was rolled out to the entire Buffalo office, where about 50% of Phillips Lytle employees work. After all customizations were finalized, Expert Expenses was rolled out to the rest of the firm with successful adoption.

Business Impact:

Since implementation, the firm has seen:

- An improvement in their WIP-to-cash cycle. Expert Expenses populates billable expenses right into the prebills immediately upon approval, allowing the firm to bill in a timelier manner.
- Gone are the days of crucial employees keying in expenses manually, allowing them instead to contribute their value through more strategic initiatives as opposed to manual tasks.
- Employees now get reimbursed faster – the firm now pays bimonthly, effectively eliminating the endless calls to get paid out of cycle.
- The firm no longer needs a third party to make payments via ACH, eliminating that expense.

In Their Words:

"Expert Expenses has totally revolutionized the way we reimburse our staff. Now, we have an employee who's the final step, looking at the entire process and finding where things may have been miscoded in the past. For example, expenses that didn't qualify for reimbursement under the client guidelines. We've also seen an increase in employees turning in their expenses on time. Expert Expenses has been really helpful in pinpointing instances that were previously a real problem, which now allows us to focus on the expenditure itself as opposed to just rushing to key it in in order to get the employee paid quickly."

— Jay Cavarello, Controller at Phillips Lytle

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