

# Beyond E-billing: Automation and matter management transforms carrier's legal department

## Overview

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A large multi-state insurance carrier had no established processes for invoice management. Law firms submitted their invoices to the carrier as an individual email attachment, and the carrier's litigation adjusters manually reviewed and approved.

In November of 2020, a new litigation executive was hired to lead the claims department with the priority of curtailing legal spend.

## Challenge

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Tracking and processing the thousands of invoices they received annually was no small feat. The claims department was suffering from lost productivity to the highly manual invoicing process. Invoices were either being incorrectly tracked, or not being tracked at all. This forced claims leadership to find a solution that would ensure all invoices would be tracked, meet company billing guidelines, and lessen the hands-on approach that was killing department efficiency.

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## Solution

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The newly hired executive wasted no time in facilitating a new strategy for the legal department, which was an important first step in transforming the team.

“We were all in agreement that things needed to change, and we knew that we couldn’t do it alone,” the claims executive explained. “We needed to transform the way we handled invoicing and make better use of technology to streamline processes. This new mindset got us all on the same page about what we needed to accomplish. Once we identified where the problems lay, we were ruthless in our approach to solving them.”

Like any transformation, choosing the right partner is key to ensuring success. The claims executive undertook an extensive journey to find the right vendor, interviewing a number of e-billing and legal bill review companies. He asked not only about the features and functionality but about each company’s product roadmap and their vision for the future of legal invoicing services.

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The executive knew soon after the first meeting with CaseGlide that he had found the provider he needed. “We knew from the start that CaseGlide was not just a vendor, but a partner who would be as committed to our success as we were. We were impressed with the CaseGlide team’s effort to understand our problems and work to deliver a solution that would fit with our strategy.”

He determined that to be successful, the chosen e-billing solution must reduce manual effort, increase visibility into legal spend, and provide detailed reporting. “CaseGlide’s e-billing solution provided us with a simple and intuitive process for reviewing, adjusting, and approving invoices. As an added bonus, we avoided more confrontational bill review tactics to improve our relationships with our outside defense firms,” the executive said.

Legal spend experts from CaseGlide set up a system to help screen invoices using a custom rules engine to ensure outside defense counsel were following the company's billing guidelines. If they did not meet the specified criteria, those invoices were flagged for litigation adjuster review. Invoices that did not contain guideline errors were passed directly to accounts payable via an integration. By streamlining the invoice submission and review process, CaseGlide's e-billing solution freed the litigation adjusters from hours spent reviewing invoices.

Along with process efficiencies, CaseGlide gave the organization total visibility of their legal spend, vendors, and budgets for the first time. With electronic invoices and a system of record specifically set up for the legal department, they now have:

- A record of what is paid and when
- Ability to view invoices next to the work product
- Visibility into outside counsel rates
- Reports to track spend

## Results

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By utilizing CaseGlide's e-billing platform, the executive was able to implement an efficient spend management process and provide transparency into legal spend for the organization.

"Our legal department can now see where every dollar is being spent and proactively manage our outside law firms, ensuring work is given to the most efficient firms," said the executive. "The combination of CaseGlide's e-billing and matter management solution in an integrated platform has helped us transform our legal department and achieve a ROI we never thought possible."

With CaseGlide, the organization eliminated many of their manual processes with automation. Enhanced reporting provided the organization insight into spend data, allowing executives to make better strategic decisions for the business.

## About

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As the industry's leading claims litigation management solution, CaseGlide provides an integrated software platform that drives efficiency, delivers insight and reduces costs. The system transforms how claims departments and their defense counsel work together and increases visibility into critical claims data, allowing claims leaders to make better and more informed program decisions.

