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## LEGAL CASE STUDY



Revenue: \$140 million

Locations: 30

Employees: 780

Users: 30

Administrative Office: Greenville, South Carolina

## Ogletree Deakins

### Situation Analysis

The 21st century workplace demands strict compliance with a wide range of state and federal employment laws and regulations. Ogletree Deakins has earned a national reputation for excellence and responsiveness to meeting the legal needs of employers. As one of the largest labor and employment law firms in America, Ogletree Deakins is dedicated to providing clients with strategic resources to solve today’s business challenges. With 30 offices throughout the country, the firm was faced with a business challenge of their own – creating the yearly budget. Beth Smith, Financial Reporting Manager at Ogletree Deakins, started at the firm a few months before they began their yearly budget. After reviewing their last budget, she noticed that numerous Excel spreadsheets, containing many linked formulas, were used which made it difficult to isolate errors. At this point, she realized the challenge that lay ahead.

“The finance department would send out Excel spreadsheets to the offices, to project marketing, supplies, and other expenses, and the payroll department to contribute the salary portion,” says Smith. “The team would get all this information back and consolidate it into one big spreadsheet that became their budget. They had to work long hours and on the weekends to get the budget done within a reasonable time frame. It was a very unproductive budgeting process that I wasn’t looking forward to.”



## Solution

Smith had used budgeting software packages at other companies to create a yearly budget with successful results. She believed Ogletree Deakins could achieve the same success without relying on Excel, so she began searching for a software solution.

"I wanted a solution that would not only simplify the budgeting process but also dig deeper into our data to provide valuable insight about our performance," says Smith. "Monthly variance, headcount and timekeeper reports from a system that would allow us to load actual data and compare it to the budget would provide very beneficial information to the firm as to where they stand from a financial perspective."

Finding a budgeting and reporting solution that was Excel based was an important requirement as Ogletree Deakins employees were familiar with its functionality. With 30 offices around the United States, finding a web based solution was also crucial. They wanted to simply rollout the software through the web instead of install software on each user's machine. Their objective was to maintain control of the solution in the finance department without constantly relying on IT for support.

Smith came across Clarity 6 Legal Edition software on an industry website. After viewing a demo of the product, she and her colleagues were impressed by how the system was extremely easy to use and could adapt to the

firm's business structure. She spoke to other Clarity Systems' legal customers who raved about the product and the customer service. They explained how helpful the services team at Clarity was and how smooth the implementation would go. "The fact that I would have a service representative that I could call and get immediate support was nice to hear," says Smith. Out of the five vendors Smith and her team evaluated, Clarity 6 was the only solution that could fully meet their budgeting and reporting needs.

## Results

Clarity 6 Legal Edition has substantially reduced the amount of time Ogletree Deakins would allocate to their budget. Overtime hours and weekends spent consolidating spreadsheets are no longer required. They have eliminated manual consolidation of spreadsheets and numerical errors caused by faulty formulas. Smith says, "Our involvement in putting the numbers together for the budget cycle has been significantly reduced by using Clarity." At month-end and year-end, Smith can produce income statements quickly and easily for the executive team. In the end, Smith and her team have reduced their budgeting cycle by approximately four weeks (a 25 per cent decrease) with Clarity.

"Management has noticed the changes we've made because we are providing them with information they need much faster," says Smith. "If they ask us to change a salary increase from four to five per cent it would

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Financial Reporting Manager - Ogletree Deakins

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normally take a day and now I can make the change and turn it around to them in under 10 minutes. Our income statements have more detail and offer more answers. They can see the change in a number from year to year, look at budget versus actuals, and quickly isolate where the variance came from."

The firm has created reports for the executive level that provide an overall picture of the company as well as individual reports for each of their 30 offices. Each report allows the user access to relevant expense and revenue categories. Revenue variance reports were designed so users and executives can track revenue by person or hour and isolate the budget versus actual variance for a timekeeper at a particular office.

"Our analytical capabilities have definitely increased," says Smith. "We can analyze budget versus actual variances and trends in actuals from month to month. We have all the information we need to answer any questions about the monthly actuals that are presented to us. Before we were in a hurry to get the statements put together so we could publish them. When the questions started coming in, we would figure out what variances or increases were occurring. With Clarity we can do this as we go along."

The personnel expense section has shown the greatest improvement as they no longer use a manual spreadsheet to calculate the largest portion of the budget. Salary, benefits and tax information is loaded directly into Clarity 6. The solution is equipped with HR application integration which allows data to be transferred into Clarity from their payroll system without difficulty. Salary adjustments and variances can be calculated instantly so the firm takes 50 per cent less time to complete the personnel side of the budget.

Once Ogletree Deakins implemented Clarity, Smith and her team could see that the reviews they received from other Clarity customers they spoke to were right on track. The implementation was extremely smooth and

fast. The software installation consisted of a link that was sent out to users across the U.S. so they could access the system from their desktops and begin entering their data. Including training, it took Ogletree Deakins less than six weeks to implement the system.

"The Clarity services team was excellent during the implementation process," says Smith. "When we made a request we were never kept waiting. I could show them the spreadsheets we had and they would help us build and structure similar reports in Clarity with the modifications or enhancements we requested or they suggested. To this day, the support we receive is first-class."

Smith and her team have received great feedback on the system from users who are mostly office administrators and not finance experts. The team appreciates the Excel based system because of the experience they have using the program. Users can easily input notes and line item detail, which they are encouraged to do by the finance team, so they can understand each office's assumptions for budgeting. As Smith and her team continue to rollout more reports, users will experience all the benefits of a unified performance management solution. The next step for Ogletree Deakins is to build reports that allow users to drill through accounts to see the actual transaction and explain certain variances or increase in numbers. They also plan to use Clarity Visualizer to create graphical representations and performance dashboards of the firm's financial performance for users at an executive level.

"I've used four or five budgeting packages in my career," says Smith. "For the most part the packages are the same - you can do expenses and personnel planning and so on. The major difference is that I haven't run into any obstacles with Clarity like I have with other packages I've used in the past. It's really easy to use and to build your own reports. I've never experienced such a smooth budgeting cycle."

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