



## **Womble Bond Dickinson saves time and encourages a data-driven culture with Qlik.**

Womble Bond Dickinson (WBD) is a forward-thinking law firm with the energy, drive and determination to keep pace with its clients. From locations on both sides of the Atlantic, it provides a breadth of legal experience and services that meet its clients' needs without losing the intimacy of being connected to its local communities.

A shift in the legal marketplace in recent years has made the industry much more competitive as clients become more aware of where to seek legal advice. In addition to these market pressures and following a combination to create WBD in 2017, the firm recognised that in order to stay ahead of the game and be transparent for its clients it needed to boost results and utilise best-practice with the plethora of client data it had on file.

The core challenge for WBD was gaining accurate information and profitability from its data as staff were having to look in various systems and data sources for relevant information for each client record. To speed up information delivery and answer queries quickly and accurately the firm knew it needed one source for visual referencing across all its data.

WBD looked at several well-known BI vendors, including Qlik and Tableau. Qlik Sense stood out as it was very easy to combine visualisations and storyboarding - for example, staff could look at data before a meeting and pull together all the information needed for a client presentation. Once Qlik Sense was chosen Informance then delivered the solution which included best-practice advice and the design, delivery and deployment of the applications.

Julia Wark, Head of Financial Systems for Womble Bond Dickinson says: **“We went through a comprehensive tender process, looking at the key players in the BI market, before selecting Qlik Sense as our preferred solution. We were really attracted to Qlik Sense due to its flexibility and we were impressed with Informance’s knowledge of delivering Qlik solutions to the legal sector”.**

Informance really guided WBD with best practice in building apps and delivering training for a quick and easy use. The first app to go live was for profitability - looking at client matters with detailed information on key statistics, such as who’s been working on the file, how experienced they are and the associated costs. Also, looking at debtors and work-in-progress (WIP) to make sure everything is accurate and correct at any stage of each client case or file.

A team management app followed to help show what is happening in teams such as work-time allocations, performance and WIP building. WBD is committed to getting the best of both Qlik and its people and has improved data literacy by encouraging a data-driven culture organically and over time, rather than assuming instant adoption.

The third app delivered was for partner appraisals, looking at KPI metrics and using Qlik NPrinting as part of the process.

Julia says: **“We have a lot of financial KPIs and moved to automated reporting with NPrinting so that management accountants don’t have to spend around 3 days accessing data files from Excel. We use the time saved to add-value to the business through analysis in areas such as statistical information for unbilled accounts and team time.”**

Qlik Sense has enabled WBD to be able to really understand the needs of senior managers, partners and management accountants and apps can be tailored to focus on how and where each user needs to work with their data.

The most recent app delivered is for unbilled time, where users can register the amount of time for the work they are doing as its done and the business can see the timeline and the work and processes completed.

Julia says: **“What I especially like about Qlik Sense is its storyboarding, which enables us to get data quickly and collect insights and visualisations that tell a story, by highlighting key points in the data and removing information that’s not relevant. This information can then be presented on a tablet to our internal teams and clients, which enables quicker decision-making”.**

WBD can now develop and deliver its own Qlik apps to the business, but still works with Informance to review what is already in place, identify more efficient ways of working and make sure apps are performing at optimum levels. Informance is also helping WBD to develop a matter exposure app to help the risk team highlight potential scenarios and files at risk. For example, if there are too many matters outstanding, how does this fit in regards to compliance?

Julia says: **“We enjoy working in partnership with Informance because of the company’s experience, flexibility and knowledge. Informance really help make sure we are using our data in the most efficient way within an app, particularly in the areas of complexity and confidential legal matters. WIP timelines also need really close management to make sure we pull the right data and information”.** Julia concludes: **“Informance delivered Qlik Sense promptly and exactly as we expected which has impressed us and we have definitely benefited in time-saving, in particular, our management accountants can now use Qlik Sense to get accurate information very quickly”.**

### **About Informance**

Informance is a data expert who provides business intelligence and data management solutions, built using Qlik technology, to law firms who want to improve decision-making, operational efficiency and profitability through better data-driven reporting. Informance’s legal solutions include unique dashboards that manage financial performance, matter, client and fee-earner profitability, human resources, marketing and business development and market sector performance.

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