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User Meeting Notes:

6/25/2019 - w/ Nate Hong

- John Reynolds - Web Development, Premier.
- Main on the attorney side, legal services they provide.
- All types of legal services out there.
- Attorneys specialized in one or two types of work (e.g. contracts, or business formation: LLCs, corporations) > specialized knowledge. Nate > Immigration attorneys, labor and employment law.
- All attorneys can all functions, but they are only specialized in one.
- Our tool probably more useful for some attorneys vs. other types of attorneys.
- More relevant to bigger firms and medium-sized firms, compare attorneys effectiveness/stats > smaller/solo not so relevant.
- How attorneys get paid: Hourly (e.g. making a handbook > e.g. $350/hr for 4-5pm, using a template), Flat Fee: $2500 for a handbook (some firms (attorneys in labor employment) are really good at handbooks), or Contingency (they'll take your case, you don't have to pay them unless they win. If they win you money, they get a cut of the money).
- Q: What's gonna be most profitable?
- Tool geared towards bigger firms, billing hourly > can track your time (data stored differently). Have to record your time > how much time billed, what happened included on invoice. More data involved > can be used for analytics. *Flat fees, maybe if we record time.
- *Billing practices: > Billing Software.
- Bigger firms use larger in-house platforms, Clio is a cloud-based platform.
- Client > Matter > Fee Structure (All Saved).
- Can open up matter again, with tasks.
- UTBMS - Uniform Task-Based Management System > big firms use these task codes (UTBMS.com > American Bar Association).
- Task codes used for analytics > gain insights into attorney work and effectiveness.
- Law firms will send us .txt files > LEDES 1998B files, we can use the data from the txt file.
- LEDES Data > Data Warehouse > Data Analytics + Reports (Monthly, Bi-Monthly, per attorney etc.)
- More complicated analytics: matters, time spent on each matter, + number of other attorneys that worked on that matter.
- Focus: Data displayed nicely to present the data in a user-interface.
- Clio does basic reports > we want more advanced reports, helpful + meaningful reports
- Data insights > more detailed, graphic support for graphs, more resolution for hours and who was working what.

- See how people are doing on matters, who is active, productivity, who is minimally active.
- Allow people more tools to see what is happening in their practice, and power to change things.
- More in-depth versatile reporting.
- * Pick a proof-of-concept report, what a great report could look like. What dimensions are most valuable to the client, and a report that could meet or exceed expectations.
- **Review: just billable hours for an attorney > expected to meet 1800-2000 billable hours a year. If attorneys aren't billing, the firm isn't making money. (to meet that, an attorney has to work 10-12 hour days all year) - accounts for write-offs too - lowers billable hours for the year.
- Exceeded > promoted + bonus, not met > might need to let go, no bonus.
- How much time I am working? Am I on track for meeting billable hours.
- **Rain-making-bring in clients, client data per attorney (new vs. old), how many does this attorney bring in? Compared to others?
- Budget to drum-up business, rain making.
- **Pro-bono work, good publicity > gives insight, charity, good advertisement etc.
- Concerns for work-life balance for keeping attorneys healthy and happy > stay with firm, supports good firm culture, more efficient work > spend time out of the office.
- Billable > Rainmaking > Efficiency > Work-life balance.
- Create reports in a nice, meaningful way. > Tracked by UTBMS task codes > Help attorneys and partners to run effective law practices.
- Firm run by people who may or may not know how to run a business.
- Revenue + Culture > Attorneys (Annual Reviews - *Billable really the only thing stressed or looked at) > More insights into attorney practices.
- Keeping costs low for clients.
- Focus: Individual Attorney reports.

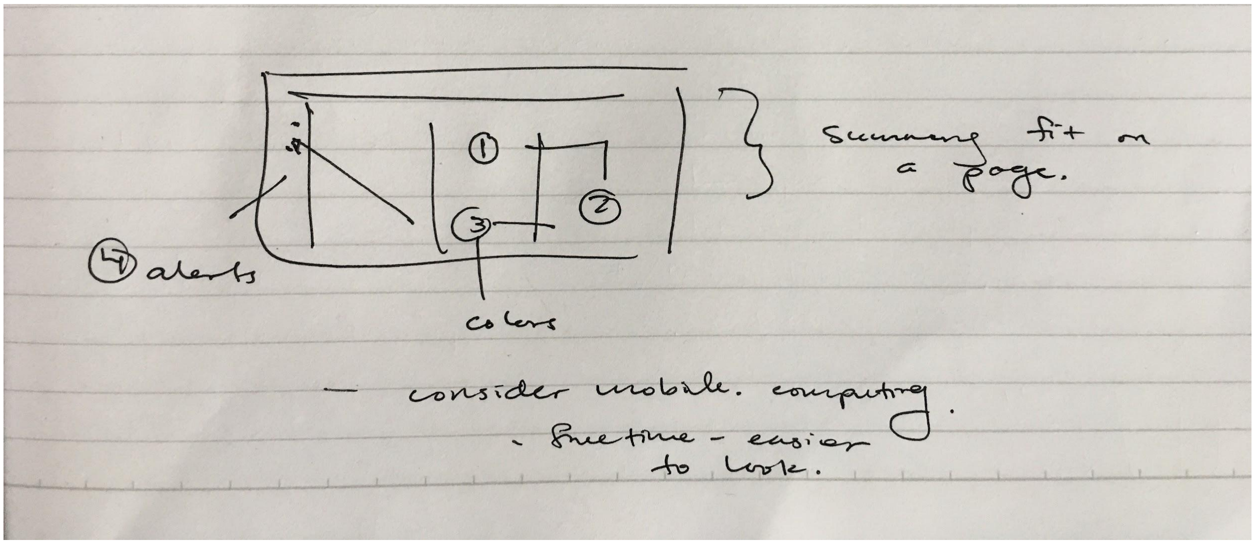
<u>7/6/2019 - w/ Nate Hong and Rick Abelmann</u>

- Each piece has a time component.
    a. Linking pieces of a project to a person (e.g. why a book is so expensive, because so many people put work into it).
- Accurately account for.
- Individual billing time - need to be working.
    a. People who screw around vs. those billing hours.
- Firm target (grade = billable hours).
    a. Quality work + billable hours.
    b. No low quality work (look at work + write-off factor).
    c. Write-off factor: 20 hours w/ 1 hour written off = more effective vs. 40 hours w/ 20 hours written off.
- Don’t always know what/how I’m doing.
- Experience vs. quality work > higher pay.
- Seasonal - busy cycles (e.g. cycles 3-month).

- Weekday productivity levels - lead to work schedule change.
- Know where you stand at all times:
    a. Work? Tracking? Working hard enough or well enough? Pleasing people upstairs?
    b. E.g. law school rankings, and grades not released until after first year, delayed.
- Tasks + time > managing people > developing clients > rain-making/networking > # + $ tracked > grow more business
- ^^ All the foundational things, then on top of that you have inner/inter firm politics to worry about.
- Annual reviews: lack meat/proof, only 3 #s, raises and promotions based on what? > insights for individual attorneys.
    a. Incentivize individual attorneys to log their events and also for administrators to use this software. Win - win situation.
    b. Clients as leverage for negotiating pay etc. when meeting with administrators
    c. What am I worth? Here is what I am worth. What will you pay me?
- Clock it in to numbers > develop habits > know where you are at.
- Firm goals streamlined: competitiveness, gamification, see what others are doing (but also keep personal data private, data privacy. Others should not be able to identify a single person based off of the data they see.)
- Summary dashboard (maybe weekly dashboard) > once a month, comparative time periods. Am I getting better?
- Be able to see yourself vs. other people like you (compared to others - ones the user is interested in).
- Conflicts of what attorneys see vs. what administrators see.
- Interpretation:
    a. 23 practice areas - leads to x amount of income vs.
    b. 10 practice areas - leads to twice the amount of income.
        ■ Suggestion: Perhaps you want to focus on less practice areas.
        ■ Draw correlations > show sweet spots of effort vs. revenue.
- Ideas for graphs:
    a. Hours per matter.
    b. Clients generating most revenue.
    c. Total hours vs. billable hours.
    d. Billed hours vs. approved billed hours > how to track.
    e. % of time in each practice area.
    f. Effective billing rate - after you write-offs (e.g. $350 - $50 written off = $300/hr).
- ^^Features to include:
    a. Toggle views: compared to everyone.
    b. Details: click for more detail.
    c. Dashboard has just a few things up front, and then able to click in for more info.
    d. Content has to be easily/readily readable and digestible.
- Dashboard Feedback:
    a. Billing information - attorneys don't care for that
        ■ Operations team does billing, they are a separate team.
    b. No daily tasks (month to month is what we are going for.
    c. + Easily readable

    d. Performance can be viewable month to month, e.g. In June you accumulated extra billable hours than you needed.

- Eye traffic looked like this:



<u>7/12/2019 - w/ Nate Hong and John Reynolds</u>

- Administrator:
    a. Can be an attorney - high level attorney
    b. Also, can be an administrator, people who are not attorneys.
- Take out timekeeping
- 5 Categories or ‘tabs’ for the interface:
    a. Summary dashboard
    b. Analytics - detailed reports
    c. Settings
    d. Targets - goals
    e. Reports - Excel datasheet format vs. visual communication
        - Does not imply any sort of format: Excel? Regular graph?
        - People can use to combine with other things or use on their own
- Individual provider summary:
    a. Move dashboard menu to the top of the interface
    b. When a graph is clicked > drill into more detailed charts, different sections of reporting > have e.g. ~12 different charts + benchmarks to see how this graph adds up to that > streamlined for the backend: present less, smaller sets of data (when needed)
    c. Make the interface able to adjust to portrait and landscape screens on laptop, iPad, and mobile
        - Utilize break points to allow for the interface to react in different ways for different displays (laptop, iPad, mobile etc.)
- Billable Hours:
    a. Add actual values for date/month on the x-axis

b. + Like the presentation
c. Click interaction for monthly > annually; to change the timescale of the graphs
d. Another entry - average daily hours to make annual goal > drill down deeper

- Premier:
  a. Reports: too much data, too hard to consume
- Like the 'Top 3' for the month > maybe year?
- Data pull > monthly, invoiced data: reliable, vetted, final, no changing
  a. Once a month. No daily, weekly - just monthly
  b. .txt LEDES file (pipe delimited) - all records together in one
  c. No client geography
- Categories for dashboard:
  a. Matters: one company may have multiple matters
  b. Billable hours
  c. Clients
  d. Revenue: payments received, what's leftover, expected time for payment, money to collect on.
- Interface notes:
  a. Menu across the top of the interface
  b. 4 categories > 'see full detail' button for full ~20 page report.
  c. 'Expand Icon' to expand the view of a graph. More detail included, yet not full report.
- Fact table: #s you can add/do calculations on
- No:
  a. Time keeper
  b. 'Create new' button
  c. Search bar
  d. *Might fill top bar with other things
- Yes:
  a. Toggle time scale individually, maybe all together. Test and see what feels best.
- Goals:
  a. Flesh out draft of full detailed report of graph section on the dashboard
  b. Nate is going to give more info on the details of that draft in future emails.