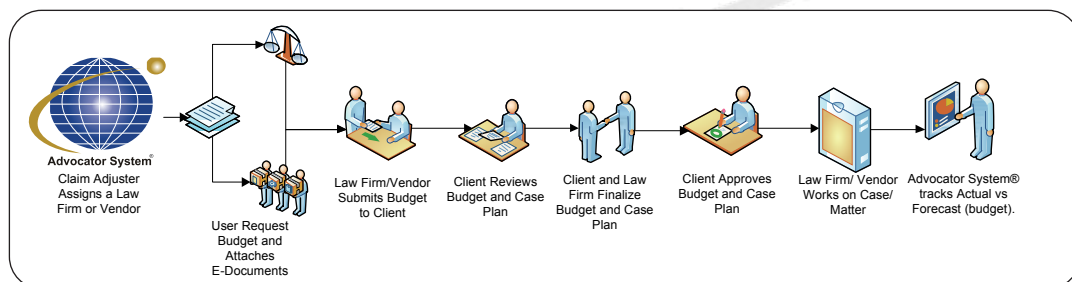




Budgeting and Case Planning

As part of the law firm or non-legal vendor Selection and Assignment workflow the ability to request a budget and case plan is provided within the Case Management component of the Advocator System®.



Budgets are defined at two levels of detail: “Life of Case” for smaller value cases/matters and “Phase Level” for more complex cases/matters. Life of Case budgets simply require fees and disbursements figures to be estimated. A Phase Level budget is based on the UTBMS (uniform task based management system) set of codes utilized in the e-billing process.

- Staffing and Case Plans:

Budgets may also include a “Staff Plan” which defines who will be working on the case/matter.

The Case Plan may be configured to suit the client requirements of initial case assessment and can be modified and updated throughout the life of the case/matter. The law firm or non-legal vendor inputs this directly into the Advocator System® as appropriate. Adopting a “project management” approach to budgeting and case planning can lead to significant improved bottom-line results.

- Tracking Budget Erosion and Being Notified:

Tracking budgets and measuring “Actual vs Forecast” is a very powerful feature of the Case Management component in the Advocator System®. Triggers may be set by the client users to ensure email notices are sent out when budgets are eroded to a certain point or “threshold”. Knowing when a budget has been exhausted to a certain percentage will facilitate further communication between the client and law firm to ensure the budget is effectively updated and expenses are incurred as expected, with no surprises.

The budgeting feature provides an interactive platform to facilitate the “matching of expectations” between the client and law firm or non-legal vendor.



About LSG

Legal Solutions Group (LSG) is a global leader in web-based software applications and outsourced supporting services. Our solutions provide electronic business process management tools that focus on litigation planning and performance measurement of the client's legal and non-legal professional service providers. We specialize in the general insurance, third party claims, loss adjusting and banking segments of the financial services industry. LSG also supports the corporate legal departments from a variety of other industries.

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