

The Future Of Global Spend Management



Brickell Global Legal, Founder & GOTO Foods, Legal Operations



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Harrison has:

- Over 25 years experience in Corporate Legal Operations and Legal Technology
- Over 241 Fortune 1000 Corporate Legal Department projects
- Over 10 years of working at ELM vendors
- 5 years managing Legal Operations at a Fortune 230 in-house corporate legal department
- Founder and CEO of Brickell Global Legal, a Legal Operations firm since 2015
- COO of a Legal IP technology company in Berlin Germany
- 169 countries implemented, most of anyone in the legal operations industry

Harrison, an avid industry writer and speaker, is considered THE industry expert in global ELM, Spend/ebilling, and international tax deployments, as well as a recognized leader in legal project management of large-scale ELM implementations. He is a certified expert in T360, Passport, Checkbox, Juralio, Knowliah, Dazychain, Brightflag, Xakia, Ironclad, Linksquares, Icetis, TeamConnect, LegalTracker, LawManager, eCounsel/Secetariat, Ringtail, Memotech and more... Including being the only remaining certified LawManager project manager.

[Harrison Underwood - LinkedIn](#) [Brickell Global Legal](#)

Industry Expertise

Harrison, a former Olympic trial fencer, is a legal business process and technology expert with 25 years vast knowledge of the corporate and law firm legal technology and operations landscape. He works with GC/CLO's and Heads of Legal Operations/IT implementing global legal strategies, transformation initiatives, and Enterprise Legal Management systems (IP, Document, Contract, Matter, eBilling, eDiscovery, Conflicts, and more). He also works with clients to improve and upgrade previously implemented systems and develop processes to drive efficiency of those systems. He has become a trusted advisor to many CLO's, on the use of these systems globally. Prior to founding Brickell Global Legal, he worked with newly formed Morae Legal as their go-to independent contractor for all their large international legal projects. He was also a Director at Wolters Kluwer ELM and FTI Consulting, as well as a Manager at ADP, Huron Legal and Mitrastech.



Harrison, has been published extensively in Inside Counsel and is a frequent industry speaker as he is considered an expert in legal KM, Spend, CLM, DM, and ELM process and technology internationally. Harrison is currently co-writing the book *Legal Operations: Spend Management*, an industry handbook and history to global legal finance and operational excellence.

8 Roadblocks to a New ELM Implementation (And How to Break Through Them)

"What are the roadblocks?"



Inside the Numbers

LEVERAGING BROAD DATA, NOT DROWNING IN BIG DATA

By Harrison Underwood,
Premier Implementations Center of
Excellence Manager, Bridgeway

In today's world, data is more available than ever before. In fact, so much data exists that legal department operations managers often struggle to corral all the data they receive and turn it into useful information.

Consider responses to this year's Law Department Operations survey. When asked to what extent they use data mining and analytics to predict case outcomes, more than half of respondents, nearly 56 percent, said they never do, and only one in four said they sometimes do. Another 52.5 percent said they never use data mining and analytics just to predict discovery costs. Why? Perhaps the answer lies in the data itself.

While many legal technology vendors have focused on Big Data, Broad Data is actually a more helpful tool. Broad Data



Harrison Underwood
Bridgeway

encompasses more than a single source of metrics such as invoice data. Broad data includes data pertaining to matter outcomes and timeframes as well. Some of the most useful information blends quantitative and qualitative data across a myriad of sources to drive strategic and operational decisions. Armed with this actionable information, legal departments can determine things like staffing levels and better predict outcomes, in addition to choosing the right law firms for specific matters. As a result, LDO managers can better help attorneys provide sound legal advice and move beyond the impossible goal of eliminating risk to the more practical work of managing risk.

For many years, lawyers were often considered some of the least tech-savvy people within organizations. That is changing as in-house counsel and LDO managers realize the full benefit of today's technology and how leveraging Broad Data enables them to deliver greater business value.

AGENDA

- 1 Our Past
- 2 The Present
- 3 Law Firm vs. Corporate Legal
- 4 Going Global
- 5 Taxonomy
- 6 The Future
- 7 Wrap-up





Legal Spend Management – What is it?

Our Past

The History of Spend Management

Global E-Billing

- E-Billing is a core component of legal spend management. It automates the submission, review, and approval of legal invoices, ensuring compliance with billing guidelines and reducing manual processing errors. **E-Billing systems also provide valuable data that can be analyzed to identify spending trends and opportunities for cost savings.**
- These tools help legal departments streamline their operations, improve financial transparency, and make more informed decisions about their legal expenditures

Law Firm vs. Corporate Legal Department

Outside Counsel Guidelines – detailed regulations that find savings

- **Expense Codes**
- **Activity Codes**
- **UTBMS Codes** <https://utbms.com/>
- **PDF vs LEDES** <https://ledes.org/>



Legal Billing Guidelines

These Legal Billing Guidelines offer a common, standardized set of terms for use with outside counsel. Standardization will benefit all. We encourage you to adopt or adapt these terms for your company's use with outside counsel. This work is licensed under the Creative Commons Attribution 4.0 International License. To view a copy of this license, visit <http://creativecommons.org/licenses/by/4.0/>. As part of the license, attribution is required. The attribution is "CLOC (Corporate Legal Operations Consortium) Legal Billing Guidelines" or "Based on CLOC (Corporate Legal Operations Consortium) Legal Billing Guidelines."

The Present

Living in a world of changing priorities

Corporate Legal Spend Management and E-Billing are essential tools for modern legal departments to manage and optimize their legal expenses efficiently.

Corporate Legal Spend Management

- This involves the process of reviewing, tracking, analyzing, and reporting on both in-house and outside legal costs. The main goals are to increase efficiency, transparency, and cost control within the legal department. Key components include:
 1. **Legal E-Billing Software:** Automates the invoicing process, replacing paper billing with electronic invoices. This can range from simple PDF uploads to sophisticated AI-assisted reviews that ensure compliance with billing guidelines¹.
 2. **Law Firm Management and Preferred Provider Programs:** Supports the onboarding and management of law firms, including aspects like firm selection, diversity, and alternative fee arrangements¹.
 3. **Timekeeper Rate Management:** Tracks and reviews the rates of legal practitioners, comparing them with industry benchmarks to ensure cost-effectiveness¹.
 4. **Legal Spend Reporting and Analytics:** Provides insights into spending patterns, helping to build dashboards and support data driven decision making



AI can increasingly help you deal with lots of the administrative detail about what's been done in a matter. You won't need to spend so much time on that in future. You can then focus your time on articulating what you really want done in advance, agreeing what's a reasonable way to do it and a reasonable level of resource and pricing to apply. And in seeing when changes are required. That future of increased collaboration and communication is a real positive potential of AI.

Graeme Johnson, Juralio
www.juralio.com

Taxonomy

Data Privacy noslegal, SALI, SOLI

Data Privacy: This includes GDPR, UK regulations post-Brexit, the EU and USA data sharing policy framework agreement of 2023, and the UK-USA data bridge. <https://gdpr.eu/>

- noslegal: Focus on consistently describing your work in simple terms, with an emphasis on financial aspects. This includes firms like A&O Sherman and other UK firms with an international focus. Notably, 24 firms will be meeting in London on October 2nd. <https://www.noslegal.org/>
- SALI: Contributing thoughts and details on American law to the basic classifications of UTBMS/LEDES in the USA. <https://sali.org/>
- SOLI: Initiated in August 2024 in the USA. <https://openlegalstandard.org/>

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"If we want things
to stay as they
are, things will
have to change"

"The Leopard" Di Lampedusa

Future Predictions

In the Weeds vs. In the Data

- Collaboration vs. Antagonism – creating better productive relationships with OC.
 - The end of OC Guidelines as we know it today. They have reached their limits and usefulness.
 - Inhouse and OC will talk about what we need and agree on a reasonable fee up front.
 - Lawyers will have to get comfortable with these relationships. No guidelines can do this kind of work.
- AFA good-bye!
 - What's most important to that matter?
 - Time based hourly rates vs. true stage by stage billing
 - Individual metrics billing by milestone
- What are we using AI for? To find more “savings” in a legal invoice?
 - Ai will do the in the weeds work
 - Pricing the “work” based on scope and assumptions.
 - AI + Common Sense
- AI big data – analyze your numbers
 - Better data based on what you are actually doing

Going Global

Checklist for global spend management and e-billing systems to ensure a modern and efficient process

1. Required Data Capture

- Ensure all necessary data fields are captured for compliance and reporting.
- Include details such as vendor information, invoice date, amount, and description of services.

2. Allowable Forms of Invoice

- Define acceptable invoice formats (e.g., PDF, EDI, XML).
- Ensure compatibility with your e-billing system to streamline processing.

3. Tax Movement & Compliance

- Track and report tax movements accurately.
- Ensure compliance with local and international tax regulations.

4. Regional EDI Guidelines

- Adhere to Electronic Data Interchange (EDI) standards specific to each region.
- Ensure seamless integration with regional partners and systems.

5. Storage and Archiving

- Implement secure storage solutions for invoices and related documents.
- Ensure compliance with data retention policies and legal requirements.

Going Global

Checklist for global spend management and e-billing systems to ensure a modern and efficient process

6. Proof of Origination

- Maintain records that verify the origin of invoices.
- Ensure authenticity and prevent fraud.

7. Acceptance of Service

- Establish protocols for service acceptance and verification.
- Ensure services are delivered as per the agreement before processing payments.

8. Special VAT Handling

- Manage Value Added Tax (VAT) requirements specific to different regions.
- Ensure accurate VAT calculations and reporting.

9. Data Privacy

- Protect sensitive information in compliance with data privacy laws (e.g., GDPR).
- Implement robust security measures to safeguard data.

10. Data Integrity

- Ensure the accuracy and consistency of data throughout the billing process.
- Implement checks and validations to prevent errors and discrepancies.

By addressing these key areas, you can create a robust and compliant global spend management and e-billing system that enhances efficiency and reduces risks.



Questions?

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QUESTIONS?



DATE GOES HERE

THANK YOU!