

Unlock Insights into Outside Counsel Billing and Staffing Guidelines

Corporate legal departments and insurers are now more than ever looking for actionable insights into outside counsel management. While many have billing and staffing guidelines in place, there is an opportunity to add value to the organization by applying them strategically.



When it comes to effectively using guidelines, where do you stand? Gartner, in partnership with Wolters Kluwer ELM Solutions, created the Outside Counsel Billing and Staff Guidelines survey, focusing on three key areas: guidelines design, compliance and enforcement, and management and maintenance¹. Key highlights from the survey are outlined below.

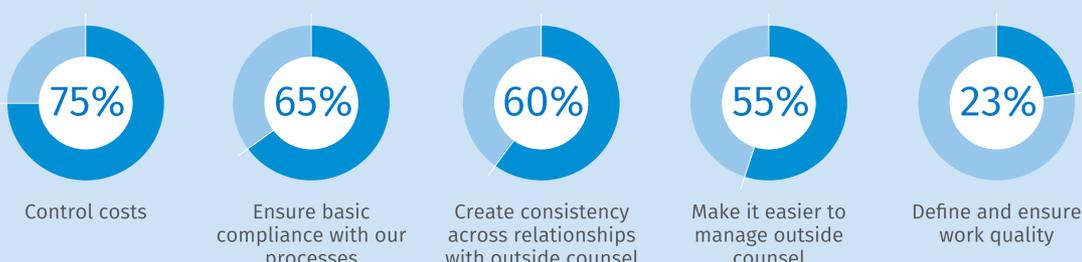
Guidelines Design



Over **3/4**

of respondents either already have guidelines or are developing them

Primary Objectives in Implementing Billing and Staffing Guidelines:



Nearly nine in ten respondents agree that guidelines should be detailed and specific.

Only 31% include formal requirements addressing diversity and inclusion, and data security, even though both topics are increasingly important to legal departments and companies alike.

Compliance and Enforcement

Only 6% of respondents indicated that their guidelines make outside counsel's invoices "very easy" to audit for compliance.

31% of respondents are satisfied with outside counsel's compliance with their guidelines.

0 Number of respondents that answered "completely satisfied"

60% also indicated experiencing at least some degree of **inconsistency in compliance among different firms.**

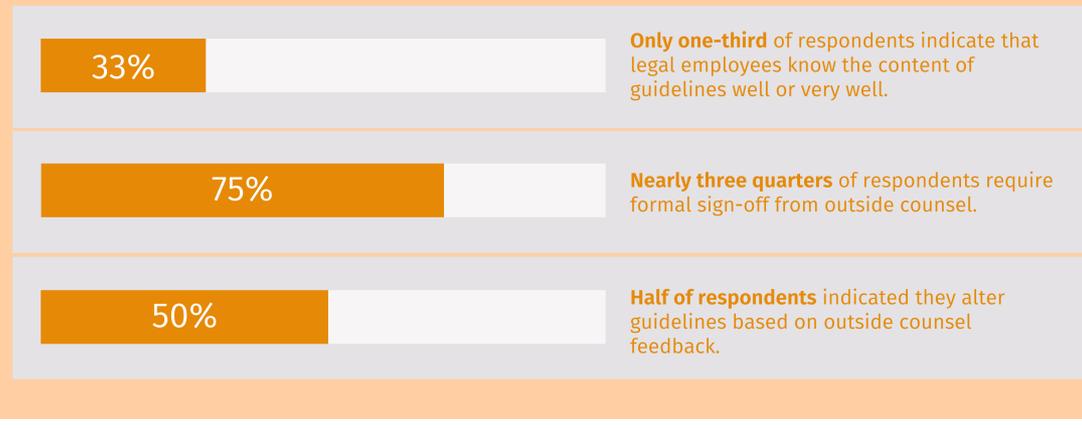
Less than one-third of respondents update guidelines annually, and guidelines rarely include emerging topics such as diversity and inclusion, or data security.

When responding to non-compliance...

- 38%** reduce payment
- 28%** send an automated notification to the law firm via e-billing for each violation
- 28%** raise their assessment of compliance in an annual review

Maintenance and Management

36% of respondents do not know who takes responsibility for overseeing compliance with their guidelines at each firm.



Bringing Findings into Focus

Few are successful in using guidelines strategically. Most surveyed have billing guidelines in place and yet no respondents are completely satisfied with outside counsel compliance.

Here's some ways to further the use of your guidelines:

- Continuously refine them with your objectives, quality, and outside counsel feedback in mind
- Offer internal and outsourced options for reviewing invoices.
- Let firms know why an adjustment was made and give the opportunity to correct the invoice
- Provide firms with compliance related metrics to improve performance
- Use prior approval provisions strategically to force communication at critical points in the development of the matter

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