

Key criteria for a claims litigation management solution

The right technology is essential to managing claims defense so P&C insurers can provide their policyholders with the best service while managing legal and indemnity costs. But what functionality should your litigation management solution provide? Here are some important requirements your solution should meet:

Provides advanced decision-support technology:

- Predictive analytics** – Rank law firms using predictive budget and cycle time data
- AI-enhanced bill review** – Advanced bill review utilizing machine learning to save money and enforce billing guideline compliance
- Firm assignment workflow** – Displays firm performance data to facilitate finding the right firm at the right cost for each claim
Stack ranked law firms and timekeeper noncompliance and compliance



Streamlines day-to-day tasks:

- Role-based homepage** – Delivers relevant, custom information, tasks, reminders, and reports to each user
- Intuitive navigation and role-based, configurable user interface** – Provides ease-of-use for staff and encourages broad user adoption
- Matter creation, counsel assignment, and matter close wizards** – Streamlines data entry, workflows and common processes
- Microsoft Outlook® integration** – Enables claims professionals to work directly in Outlook and other Office solutions for day-to-day claims litigation tasks
- Calendaring/event management** – Enables easy identification of key dates and tasks to better manage deadlines
- Notifications** – Proactively alerts staff to the latest priorities and developments relative to their matters
- Document assembly** – Supports quick generation of routine/required documents

Supports collaboration with outside counsel and firm performance measurement:

- Collaboration tools** – Streamline the request and capture of matter, budgets, matter narratives, accruals, and timekeeper rates from outside counsel
- Law firm performance tracking** – Scorecard firms at matter closure
- Diversity tracking** – Tracks organization and timekeeper diversity data
- Panel management** – Create and manage panel criteria and member law firms, assign panels to matter type

Meet current and long-term business needs

- **Flexible, scalable, and configurable** – Can be configured to meet current and future business needs
- **Built for claims litigation market** – Supports needs unique to each claims organization
- **Integration with claims management systems** – Integrates with current technology investments
- **Integration with other business systems, including Accounts Payable** – Streamlines business processes and enables exchange of relevant data/metrics
- **Strong product roadmap and investment in research and development** – Creates a sustainable solution that addresses new customer requirements, as well as technological advance

Provides comprehensive spend management to reduce legal spend and improve indemnity results

- **AFA management tools** – Support negotiation, enforcement, and evaluation of alternative fee arrangements
- **Paperless invoicing** – Converts “paper” invoices (e.g. PDFs) to LEDES files for e-billing submission and billing rules enforcement
- **Invoice review and approval workflow** – Streamlines reviewing and adjusting legal invoices

Increases visibility into legal spend to with reporting, dashboards, and analytics

- **Legal spend insight reports** – Provides detailed legal spend and analysis to identify cost saving opportunities
- **Management dashboard reports** – Communicates key performance indicators to help spot trends and identify potential risks
- **Business intelligence tools** – Enables in-depth measurement and analysis of legal spend and trends across a matter portfolio to uncover cost savings opportunities and improve forecasting
- **Scheduled/event-driven reporting** – Automates distribution of critical metrics to key stakeholders

- **Analytics capabilities** – Enables trend analysis to identify potential areas for cost savings, efficiency improvements, budget predictability, and panel management

Delivered by a vendor with a proven track record, global expertise, and world-class services

- **Demonstrated commitment to e-billing and matter management technology and the enterprise legal management market** – Provides assurance of reliable, long-term vendor-client partnership
- **Financial stability** – Established brands with extensive networks provide more stability and peace of mind than private equity market entrants
- **Documented experience with global e-billing and matter management deployments** – Ensures solution is designed to meet requirements unique to each region, including tax compliance
- **Experienced, multilingual, in-market staff** – Provides local consultation, system implementation, and support
- **In-house law firm support team** – Manages onboarding, training, and communication of system changes to law firms and provides them 24/7 technical support
- **Broad range of training services** – Supports successful deployment and user adoption to maximize solution ROI

Protects sensitive information

- **Role-based security** – Limits what different groups of users can see, protecting sensitive information
- **Hosting** – Flexible hosting options that comply with your company security requirements: private cloud-based SaaS, dedicated hosted, or behind the firewall
- **International hosting options** – Meets local data protection requirements with EU or other in-market hosting
- **ISO, HiTrust (US), SOC, AICPA, FISMA hosting** – Peace of mind that secure hosted environments meet rigorous external security audit and testing criteria

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