



Transferring Billing Data to Elite 3E Seamlessly and Error-Free for a Premier US-Based Law Firm

CASE STUDY

Law firm billing software can be a unique beast, especially when changing providers. Although these systems often contain the same data — including client information, attorney timekeeper statistics and task codes — they usually categorize it differently based on a developer’s coding approaches and peculiarities. Naturally, firms must ensure their old and new billing systems “speak the same language” to avoid any loss or corruption of data.

It’s an issue that our client, a U.S. boutique known for its class action, antitrust and securities litigation practices, faced when it tried moving off its longtime billing system to Elite 3E. The firm turned to Helm360, which Elite recently named as one of its two first Premier Delivery partners, to simplify its software transition.

Not only did our experienced team successfully pilot the firm’s move to 3E, but we were on budget and met the client’s expectation benchmarks. We also finished the project on an aggressive timeline established by the client, completing the initial transfer in three weeks through a “dirty conversion” when similar projects would have taken six weeks or more. Our phased, collaborative approach allowed us to address the client’s questions and troubleshoot transfer issues on staging test servers without disrupting the firm’s billing workflow.

The firm’s assistant controller said: “Migrating accounting systems within the firm has been a smooth and seamless process working with Helm360. Their team is professional, courteous, and highly experienced. They are with you every step of the way and promptly answer any questions we have. We are well within pace and within budget to meet our aggressive new system conversion and implementation timelines. We are in great hands with Helm360 and highly recommend them for all migration services. Thank you, Helm360, for the amazing partnership!”

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The Starting Point

Our client is a nationally recognized law firm. The firm boasts over 90 lawyers covering 16 distinct practice areas. It is a premier litigation law firm that specializes in class action and complex civil litigation. The firm has offices in multiple cities.



The Challenge

The firm approached Helm360 for assistance migrating roughly 25 years of billing data and seven years of general ledger data from a legacy platform to Elite 3E. The firm felt that Elite 3E would bring improved functionality, speed and efficiency to its billing processes.

However, when the firm initially planned out its migration, it realized the way its legacy platform categorized important client and billing data would cause transfer and account reconciliation issues during the export process. They also needed to complete the transition and account reconciliation within one month in order to maintain its invoicing schedule. Complicating matters was that the firm wanted a “dirty conversion,” which involved manually assigning data from the legacy system into 3E’s classification buckets.

Firm leaders worried that because of the system differences involved, important client information and invoices would get lost in the shuffle, and the migration would prove too costly. Therefore, the firm sought a technology partner to assist with the migration that was well-versed in both Elite 3E and its legacy platform software.



Our Solution

Helm360 conducted meticulous planning to ensure that all client data, billing codes and metadata seamlessly moved from the firm’s old platform to Elite 3E. We developed a phased mapping and migration strategy that helped the firm’s former and new programs “talk well together” during the transfer process. Helm360’s team transferred existing billing data into the appropriate 3E classification buckets. We also took proactive measures to avoid data losses or corrupted files, all within the client’s budget. That included routine validation measures and client-first project management to ensure a successful, transparent and timely conversion.



Our Process

Our team guided the firm through a multi-phase transition journey that accounted for the unique issues that could arise from legacy billing software migrations. The main steps Helm360 pursued included:

- **Data mapping and review:** After thoroughly analyzing the firm's data, we conducted stock data mapping and multiple reviews to ensure all client and billing information was uncorrupted.
- **Regular calls:** Our team set up client calls to review data map setups, master files and transactional files. We also walked the firm's lawyers through core 3E concepts to help them make informed data transfer decisions.
- **Staging:** We utilized a hybrid staging model and followed the usual staging schema to manage setups and master files. Helm360 also mimicked 3E tables for transactional modules in the staging phase to help avoid reconciliation and data field transfer issues.
- **Balancing and validations:** We balanced the firm's transaction data to ensure all entries and retainer amounts carried over into 3E. In addition, we tested data using a staging server to check for accuracy before going live so that our work did not interfere with the firm's regular billing processes.
- **Addressing hiccups in the sandbox:** Whenever errors or anomalies arose, we addressed them in our software test environment. In doing so, we developed strategies to address potential issues without disrupting the firm's day-to-day operations.
- **Conversion and account validations:** Our application and automated testing personnel reviewed and validated the firm's billing data and categories. Doing so helped us ensure the accuracy of transferred information and avoid backtracking migration steps and restarting the process.
- **Project management:** Our project timelines and weekly client status calls helped them see our progress while providing the firm ample opportunities to ask questions. Helm360's project manager and technical team immediately fielded the firm's inquiries and ensured our team met the firm's budget requirements.



The Results

Helm360's team completed the firm's first billing data conversion in three weeks — including extraction, transformation and loading. This timeframe is notable as it was a “dirty conversion,” which required our personnel to manually assign data from the legacy system into 3E's classification buckets. Dirty conversions usually take at least six weeks, if not more, to complete.

Our support team successfully moved master data, client information and transactional ledgers into the firm's Elite 3E software without a hitch, allowing them to move forward seamlessly. We resolved the firm's reported issues within 48 hours and helped the firm acclimate to its new billing system.

A satisfied client, the firm reported that the conversion process met their budgetary requirements and “aggressive” timeline. Its attorneys were also pleased with Helm360's responsiveness and thorough project management capabilities.

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The Firm's Assistant Controller and IT manager



Why They Hired Us

With more than 20 years of proven expertise on similar projects, Helm360's team has deep experience working with older and newer billing software, along with the nuances associated with legacy platforms and Elite's suite of products. We understand data and the details of all kinds of systems to help ensure seamless transitions to 3E. The fact that one vendor would have this multi-platform expertise was especially important because of the firm's tight timeframe. It would mean fewer vendors involved, streamlined project management and more agile deployment plans.

Elite product support is also at the core of our service offerings. In fact, we were named one of the two first Elite Premier Delivery partners based on our strong command of Elite's product suite and close partnership ties with Elite's stakeholders.

We also take pride in our client-first approach to service, which particularly resonated with the firm's team. Our stance? Simply do whatever it takes to mitigate downtime issues and address other crises. Our team has the work ethic and desire to help fully address a client's questions and concerns regardless of time or inconvenience.

**Need to migrate your
billing data ?**

Book a demo today to see how Helm360 can help.