



SEE LEGAL SPEND AHEAD OF THE INVOICE

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# Utilities and Infrastructure

Customer Story

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### The challenge

The legal team in a large UK utilities and infrastructure company wanted to improve the way external matters were being managed. They were on a mission to ensure they always had a current and comprehensive view of legal matters and understood their associated budgets.

Like many other infrastructure companies dealing with property transactions, it is necessary to use external land agents who have the authority to instruct law firms directly. However, this often resulted in law firms starting work without the immediate knowledge of the internal legal team.

“We needed a holistic view, not only of what our law firms were doing but how individual lawyers were managing our legal spend,” said a senior member of their legal team. “So, the challenge was finding a way to improve how we manage spend and budgets, while keeping an eye on the legal work being carried out.”

### The solution

The team deployed Apperio’s legal spend and matter management software to receive data on matters directly from law firms. This also meant that law firms could share letters of instruction, which include negotiated legal cost estimates, for matters originating from land agents.

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Apperio gave the legal team instant visibility of their legal matters, including status updates, work-in-progress (WIP) and accrued spend. "On a strategic level, it helps us manage our law firms and legal spend across the company."

This level of transparency not only benefits the in-house team, but also strengthens valuable relationships with their law firms. "Apperio provides real-time data with drill-down details available quickly, so there's no lag on status updates. In many cases this reduces the law firms' non-chargeable time, which is music to their ears."

## The results

For this team, Apperio offers far more than just a way to map out law firm billing and invoices. "Yes, it's invoices, but it also shows WIP, it shows how the cash flow burn rate is working, and it gives you visibility on overspend of matters."

Having insight on legal spend enables the customer to manage matters by exception. It alerts the team when work is approaching, or has crossed a budget threshold:

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"We can see the 'letter of instruction' directly in Apperio. When your law firm quotes for a piece of work, they can plug in the cost estimates, giving you full visibility on the progress towards budgets using Apperio. That is super helpful, particularly if it's going red", they commented, noting the colour-coded performance indicators on the team's dashboard view.

Apperio has helped this legal leadership team improve the visibility and management of all legal matters, including those previously outside the team's purview. Since inside and outside counsel are working from the same system of reference, spending is more accountable and controlled.

## Longer-term analysis and control

Once Apperio was implemented, the legal team were also able to analyse spending across the company's law firm panel. "Every legal team, whether infrastructure or otherwise, is under pressure to reduce costs. For example, using the analysis from Apperio I was able to say to our real estate team, 'You've got some big buckets of spend which are uncontrolled, but we can help you get that spend under control'."

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To find out more about how Apperio's legal spend management and matter tracking platform can help improve the transparency and accountability of your legal spend, visit [www.apperio.com](http://www.apperio.com) or please email [info@apperio.com](mailto:info@apperio.com).



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