

Overview

HBR Consulting's CounselGuide is an innovative workflow platform that helps law firms comply with each of their client's individual set of business requirements. This ensures a smooth invoicing process, increases operational efficiency, enhances collaboration, and thereby improves client satisfaction.

The Need

As a law firm's roster of clients grows, it becomes more onerous to track and manage its various **outside counsel guidelines**, pricing arrangements, diversity requirements and other engagement documents. This makes it difficult for law firms to fully comply with the wide range of unique client requirements that seem to increase every year. Law firms have been trying to solve this challenge using internal systems, email and document repositories, but they have been telling us that these strategies are time-consuming and cumbersome. Worse yet, these homegrown solutions are prone to errors or process failures, which cost their firms money and cause client frustration.

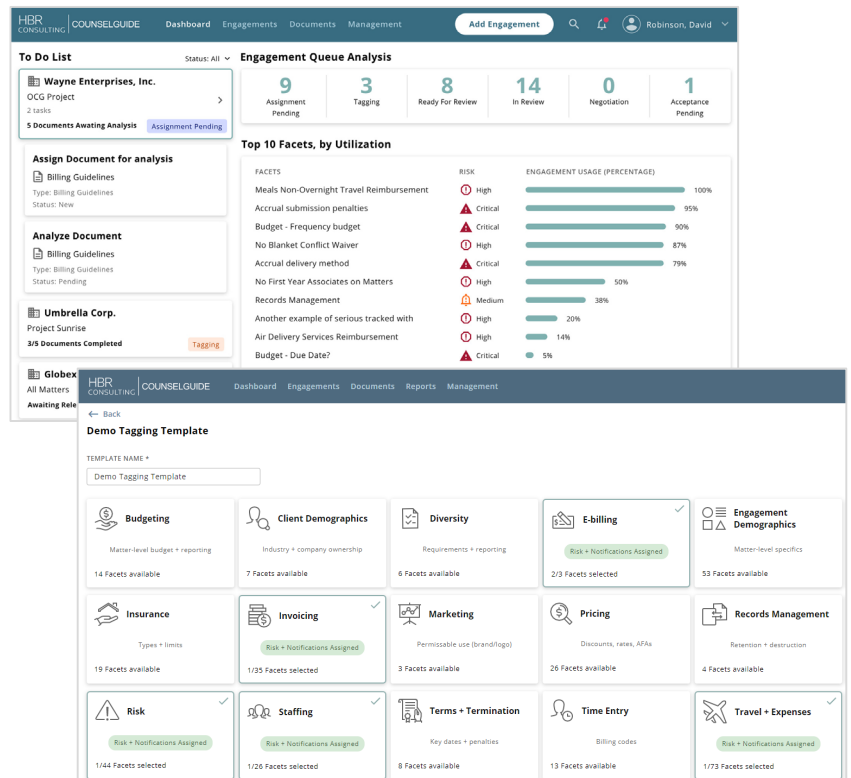
The Solution

CounselGuide was developed based on client feedback and is built on HBR's decades of expertise in contract management and law firm new business acceptance processes. The platform delivers best-in-class tools that facilitate the acceptance of new business and document management. This provides streamlined workflows that help law firms reduce invoicing errors, compliance oversights and process breakdowns.

The Benefits

- 1. Service focus.** The platform was built with a "services-first" approach that considers the unique processes of law firms alongside the technology that powers the platform. It is not another document repository; it is a custom-designed platform for law firms.
- 2. Flexible design.** CounselGuide is highly configurable but also includes out of the box best practice templates, enabling law firms of all sizes to use the role groups and facet tracking in a way that best aligns with their own workflow.
- 3. Proven technology.** The platform leverages the same proven technology behind HBR's [SpendConnect](#) and [CounselCommand](#) solutions, which provide software-enabled services and analytics to both law firms and corporate law departments.
- 4. Extraction-as-a-Service option.** HBR offers a combination of onshore and offshore resources that are trained and available to assist with document tagging and extraction, ensuring that CounselGuide contains the most accurate information possible.

Dynamic dashboards



Facet tagging

The screenshot displays the HBR Consulting CounselGuide interface. At the top, there is a navigation bar with 'Dashboard', 'Engagements', 'Documents', and 'Management'. A search bar and a '+Add an Engagement' button are also present. The main content area is divided into two columns. The left column, titled 'Engagement Details', shows 'Facet Review' for 'Mandatory Rate Freeze long long name'. It includes a category of 'Engagement Demographics', a status of 'Pending', and labels for 'policy exception' and 'client exception'. There are five circular progress indicators (1-10) and a 'Summary: 8 Aug 2020'. Below this, a 'Firm position' section states that rate freezes are unacceptable and require Department Head and Managing Partner approval. There are 'Counter' and 'Approve' buttons. A 'Comments' section shows a comment from 'Username' dated 1:30 AM, 31 Jul 2020. The right column shows the document content, starting with 'I. INTRODUCTION' and text regarding the Attorney General of New Jersey's role and the purpose of the guidelines.

Document tagging capabilities make it easy to capture important information, compare it to the firm's standard position, add smart tags, and create message board threads on the relevant review.

Connect with Our Experts

Connect with our experts today to request a demo and learn more about how law firms are using CounselGuide to solve their client compliance challenges. For more information, please visit counselguide.com.



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