

LEDES Oversight Committee

Members Meeting

August 28, 2008



Agenda

- President's Report – Jane Bennitt
- Membership/Treasurer's Report – Cathy Reilly
- Subcommittee Reports

President's Report

Jane A. Bennitt, Baker Robbins & Company

jbennitt@brco.com



Executive Committee

- **President:** Jane Bennitt, Baker Robbins & Company
- **Vice President:** Patrick Hurley, Thomson Elite
- **Secretary:** Daniel Foster, Serengeti Law
- **Treasurer/Membership:** Catherine R. Reilly, Martin Clearwater & Bell LLP

2008 Board of Directors

Jane Bennett, Baker, Robbins & Company

Michael Boutot, Esquire Litigation Services

Cathi Collins, Bridgeway Software

Patrick Collins, Allen & Overy

Andrew Dawson, Aderant

Richard Doyle, Herbert Smith

Dan Foster, Serengeti Law

Patrick Harrington, Edwards Angel Palmer & Dodge

Patrick Hurley, Thomson Elite

Bill Mertes, Winston & Strawn

Bob Mullen, Bottomline Technologies

Alison Regan, Linklaters

Cathy Reilly, Martin, Clearwater & Bell

Nelson Ricardo, Skadden Arps

Bob Solofra, McDermott Will & Emery

Scott Wirtz, Loeb & Loeb

Jennifer Zimmerman, Husch Blackwell Sanders

Peggy Weschler, ILTA – Board Advisor



Subcommittee Heads

- **Budgeting** - Bob Mullen and Cathi Collins
- **E-Billing** - Bill Mertes
- **Law Firm E-Billing Best Practices** - Alison Regan and Jennifer Zimmerman
- **LOC Governance** - Patrick Hurley and Patrick Collins
- **Marketing** - Jennifer Zimmerman
- **Timekeeper Attributes** - Cathi Collins
- **UK/Europe** - Spencer Smith and Patrick Collins
- **UTBMS** - Mike Boutot and Joe Benson
- **Web Site** - Bob Solofra and Nelson Ricardo

Focus Group Heads

- **Australia** - Denis Henry
- **Canada** - Brian McCorry
- **Vendors/Consultants** – Cathi Collins and Jim Harris

2008 Issues

- LOC Governance
 - Purpose and direction
 - Sustainability of organization

Charter - Purpose

The LEDES™ (Legal Electronic Data Exchange Standard) Oversight Committee (“LOC”) is an international, voluntary, not-for-profit organization comprised of legal industry representatives and is **charged with creating and maintaining open standard formats for the electronic exchange of billing and other information between corporations and law firms.** The LOC is dedicated to using open standards which cater to no one organization or group of organizations to uniformly satisfy the complex needs of the legal industry based on 5 basic principles: keep it simple; make it unambiguous; diverge from existing formats as little as absolutely necessary; only ask for information the law firm is typically able to provide from their financial system; and meet the needs of corporations, law firms and legal industry software vendors to the maximum extent possible consistent with the first four criteria.



2008 Issues

- Our constituency
 - Competing agendas
 - Global differences
 - How we relate to each other
 - How we are regarded

Charter - Constituency

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2008 Issues

- Formats
 - Usage
 - Globalization
 - Taxes
 - Complexity

Charter - Formats

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Upcoming Conferences

- Mitrastech Interact, September 21-24, Marina del Rey, CA
- Legal Week Corporate Counsel Forum, September 23-24, Lausanne, Switzerland
- EXPP Summit, September 29-31, Frankfurt, Germany
- Lawtrac User's Conference, October 1-3, Ponte Vedra Beach, FL
- ACC Annual Conference, October 19-22, Seattle, WA
- Bridgeway Client Conference, October 27-30, Baltimore, MD
- Legal Tech NY, February 2-4 2009, New York, NY

Membership/Treasurer's Report

Catherine Reilly, Martin Clearwater & Bell

reillc@mcblaw.com



MEMBERSHIP

- **12/2006** **68 member organizations**
- **1/2008** **85 member organizations**
- **8/2008** **98 member organizations**
 - Near 50% increase in membership in just over 18 months
 - *2 memberships are free
 - Advanced Legal Systems and ILTA

MEMBERSHIP

- **8/2008** **98 member organizations**
 - **51 Law Firms**
 - **34 Vendors**
 - **13 Law Departments**

MEMBERSHIP

- **8/2008** **98 member organizations**
 - 15 are new members
 - 25 members have until the end of
September to renew

MEMBERSHIP

- **8/2008** **98 member organizations**
Non US membership
 - **16 UK organizations**
 - **4 Canadian organizations**
 - **2 Australian organizations**
 - **1 European organization**

LOC Revenue

- **98 paying members will generate close to \$9,800 in revenue.**
 - Have achieved the goal of 10% membership increase since February 2008

Budgeting Subcommittee

Bob Mullen, Bottomline Technologies

rmullen@bottomline.com

and

Cathi Collins, Bridgeway Software

cathi.collins@bridge-way.com



Charter

- Maintain and promote the Budget Standard approved by the LOC
 - Reconciliation of documents – Excel and Word descriptions of the ratified standard have some inconsistencies
 - Submit format revision recommendations as appropriate
 - Respond to market inquiries on Standard as they arise
 - Review reasons for lack of market adoption

Status

- In process of reconciling documentation
- An informal survey was sent to the Vendor/Consultant Focus Group in an initial effort to estimate the rate of Standard adoption
 - Depending on survey response, next step will entail marketing efforts to increase Budget Standard awareness and market adoption
- Committee is open to membership and meets once per quarter
 - Next meeting to be held in September
 - Contact Cathi Collins (cathi.collins@bridge-way.com) or Bob Mullen (rmullen@bottomline.com)

E-Billing Subcommittee

Bill Mertes, Winston & Strawn

bmertes@winston.com

and

Jane Bennett, Baker Robbins & Company

jbennitt@brco.com



Charter

Maintain and promote the e-Billing standards approved by the LEDES Oversight Committee. This primarily consists of submitting format revision recommendations as appropriate and assisting marketing efforts for adoption.

Update

- XML E-Billing 2.1 White Paper has been finalized, will shortly be published on web site
- Sample file and XSD still to be developed
- Taking questions on format
- Is already required in 650 firm Canadian implementation

*Law Firm E-Billing Best Practices
Subcommittee*

Alison Regan, Linklaters

alison.regan@linklaters.com

and

Jennifer Zimmerman, Husch Blackwell Sanders,

Jennifer.Zimmerman@huschblackwell.com



Two Key Areas of Focus

- Process - what can we do to make e-billing less painful and less time consuming for law firms. What could brokers do to better support the law firms. What best practice points could be suggested.
- Regulatory - consolidation of global regulatory requirements and regulatory body listings – create webpage (link to region specific sub-committees).

Key Objectives

- Consult with a wide range of law firms to pull together a paper high-lighting the continuing challenges of e-billing for law firms and suggestions for improvements (link to Common Communication Approach Subcommittee 2006 Whitepaper).
- Document key best practices and improvements required to reduce the law firm burden.
- Create a law firm section on ledes.org including a discussion forum, FAQ's and best practice documentation.

What have we done so far?

- Surveyed law firm and vendor members
- Results to be shared in following session and best practice discussion to be held
- Paper will then be circulated to all members

LOC Governance Subcommittee

Patrick Hurley, Thomson Elite

patrick.hurley@thomson.com

and

Patrick Collins, Allen & Overy

patrick.collins@AllenOvery.com



Charter

- Research, analyze and propose recommendations to the LOC on the following three governance-related issues:
 - Should the annual membership dues be increased, and if so, by how much?
 - Should the LOC consider altering its structure to formally allow for, recognize and empower different types of operating organizations within it, like regions, special interest groups, etc.?
 - Should the LOC consider altering its charter and mission statement to more accurately reflect the work it is currently doing or wants to do in the future, and if so, what should the charter/mission statement be?

Status

- Membership Dues:
 - Recommended (and Board approved) an increase to \$200 in 2009
- Structure
 - Activity planned for Q4
- Charter
 - Proposal to be presented to LOC Board at next board meeting. If approved, will be presented to General Membership

Marketing Subcommittee

Jennifer Zimmerman, Husch Blackwell Sanders

Jennifer.Zimmerman@huschblackwell.com



Marketing Subcommittee Update

- ILTA Conference Materials - Welcome Feedback
- Future Conference Needs
- Items in the Works:
 - Article for Peer To Peer Magazine
 - Article for ETech News
 - Contacting Other Publications for possible article submission: ALA, Corp Counsel, ACCA
 - Linked-In Group
 - New Member Packets
- Suggestions or be a part of Marketing - contact Jennifer Zimmerman

Timekeeper Attributes Subcommittee

Cathi Collins, Bridgeway Software

cathi.collins@bridge-way.com



Charter

- Maintain and promote the Timekeeper Attributes Standard approved by the LOC. Primarily:
 - submitting format revision recommendations as appropriate,
 - responding to specific questions regarding the standard, and
 - assisting marketing efforts for adoption of the standard.

Status

- To date we have fielded several questions concerning use by International timekeepers.
 - Amendments may be warranted – too early to tell. We will continue to monitor for feedback.
- An informal survey was sent to the Vendor/Consultant Focus Group in an initial effort to estimate the rate of Standard adoption.
 - Depending on survey response, next step will entail marketing efforts to increase Timekeeper Attributes Standard awareness.
- Committee is open to membership.
 - Contact Cathi Collins (cathi.collins@bridge-way.com)



UK/European Subcommittee

Spencer Smith, Tata Consulting
spencer.creminsmith@tcs.com

and

Patrick Collins, Allen & Overy
patrick.collins@AllenOvery.com



Who are we ?

- Co-chaired by Patrick Collins (Allen & Overy) and Spencer Smith (Tata Consulting, ex. Linklaters).
- Made up of law firms, vendors and certain clients that are currently experiencing e-billing in the UK or EU market.

Charter

- *Research, analyze and provide information on UK / EU e-billing regulations. Gain buy in to global standards from all parties involved in e-billing. Lead the way on influencing these standards by feeding back concerns from all UK / EU parties to ensure that e-billing becomes an easier process for everyone.*

Challenges / Opportunities

- E-billing has matured in the US and all players are seeking new opportunities.
- Most have decided to expand east to Europe / UK and found MANY obstacles
- Raising awareness of regulatory issues (VAT)
- We have an opportunity to influence the decisions of clients and ultimately make e-billing easier.

What does this mean for you ?

- If your law firm / corporate has EU operations / interest in e-billing, GET IN TOUCH
- We might be able to influence behaviour in the US through best practice in the UK / EU.
- Contact:
- Patrick.collins@allenoverly.com
- spencer.creminsmith@tcs.com

UTBMS Subcommittee

Michael Boutot, Esquire Litigation Solutions

mboutot@esquirecom.com

and

Joe Benson, CSC

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UTBMS Subcommittee Update

- Continued work on International Code Set issues
- Developing litigation support code set

Web Site Subcommittee

Bob Solofra, McDermott Will & Emery

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and

Nelson Ricardo, Skadden Arps

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LOC WEBSITE

Editing Member Profile

- Must be the voting member
- Changes verified

Closing Meeting

Any questions or issues?

Acknowledgements

ILTA – Providing meeting space during conference

Baker Robbins & Company – Hosting conference call
and webinar for this meeting

Advanced Legal Systems – Hosts/maintains web sites

ILTA – Host/maintains list serv

Thomson – Hosts monthly Executive Committee
conference calls

Join us at 10:30 in this room for the Law Firm
E-billing Best Practices Subcommittee
discussion of Law Firm E-billing Best Practices

