Intellistat and Steere Product-Oriented Sessions

Automating the Partner Performance, Compensation and Review Process
Presented by David Hang
Do you find yourself starting the review process weeks or months in advance by preparing binders or elaborate spreadsheets of current and past partner performance, and struggle to keep the data in them updated and accurate? This session will illustrate how you can alleviate that burden by eliminating the paper trail altogether. We will demonstrate historical trending analysis that the partners themselves can view, qualitative assessments that can be completed online and a highly comparative tool for firm management and the compensation committee to leverage.

Unique Ways Firms Use PrebillManager
Presented by Lynne Saffa
We will highlight the many bells and whistles of PrebillManager that firms use to help their attorneys, assistants, and billers streamline the prebill process. Streamlining the process means bills are out the door faster and money is in the door sooner. The opportunities are almost endless.

Best Practices and Cool Client Use Cases for AlertManager
Presented by Don Rice
In this session we will walk through the key functionality of AlertManager, featuring its capabilities in supporting the firm's financial management, data distribution and risk management strategies. We will also share success stories and highlight advanced AlertManager features that Firms have deployed, including integrations with intranet, SSRS, Intellistat, executables and external databases.

Data Mining with Intellistat Reporting and AlertManager
Presented by Ray Conti and Bernie Hui
Learn how easy it is to create reports and inquiries without needing the special report-writing skills normally attributed to traditional reporting applications. Select multiple data types, apply data filters, create shortcuts and alerts for firm-wide data distribution with IS Reporting and AlertManager.

Financial Report Creation and Distribution (*Hands-On*)
Presented by Jim Hearn
Learn how to easily create financial reports using Intellistat Financial Reporting. This hands-on session will focus on leveraging shared components (row sets, column sets and tree sets) as a means to streamlining report creation and distribution.

Focusing on Forecasting (Hands-on)
Presented by Emily Hartwig
This hands-on session will teach you the basics of creating a forecast and importing general ledger revenue and expenses. We will dive into the details of how to import and update employee metrics and how they will (or could) affect the open periods of the budget. Best practices for keeping the process clean (and simple!) will be discussed.

Deployment Strategies and Best Practices for Intellistat Budgeting & Forecasting
Presented by Allen McPheeters
What are other firms doing with Intellistat Budgeting & Forecasting? How does Data Fusion recommend using this module? We will review strategies around deployment, delegation of budgeting authority, employee compensation and revenue modeling, variance analysis and reporting and starting a new budget season.

Introduction to Designing Financial Reports
Presented by Jim Hearn
Navigate, create and edit presentation quality financial reports in Intellistat Financial Reporting. Create reports for multiple reporting units and in various formats and simplify the distribution of reports using reporting queues.

Refresher Training for Intellistat Analytics Administration
Presented by Phil Dearmore and Lisa Tauchi
This session will give a high-level overview of Intellistat Analytics administration, covering topics such as user and group security maintenance, changing the navigation menu and creating different views for different users/roles. We will also provide a preview of the NEW Intellistat Application Portal (which can also be seen in the Meet the Experts room).

Matter Pricing, Budgeting and LPM: Different Approaches for Different Audiences
Presented by Lynne Saffa and Tracey Sherwood
The pricing and legal project management world is still evolving. Some firms are refining their processes, while others are in the early stages of determining what approach is best for them. In this session, we will take a look at how different firms and different consumers of matter pricing and profitability data impact the type of technology firms ultimately select to communicate the right data to the right people.

Refresher Training for Intellistat Budgeting & Forecasting Administration
Presented by Emily Hartwig
This session will cover several administrative features of the Budgeting & Forecasting module starting with the proper security setup for different users and roles. We will discuss how to implement Virtual segments for the aggregation of business units and walk through proven methods for managing end-user variance reporting.   We will also review utilities used to generate various expense and revenue budget records, and methods for researching how employee budgets are generated, where they post to the General Ledger, and handy tips to search for invalid postings. The session will wrap up with a discussion on using custom procedures for "sky is the limit" functionality.

Integrated Rules in PrebillManager for Cleaner Bills
Presented by Lynne Saffa
Learn about the different types of rules that can be set up in PrebillManager and why they might be beneficial.   We will also discuss how rules can help the firm comply with Outside Counsel Guidelines, deliver a cleaner bill to the client and prevent rejections from e-billing vendors.

Report Creation and Distribution Strategies with EIS and ReportManager
Presented by Don Rice
In this session we will demonstrate how to create and distribute custom reports utilizing EIS BI and ReportManager. The session will include overviews of EIS BI and the distribution capabilities of ReportManager.

Revenue and Expense Modeling Mechanics
Presented by Allen McPheeters and Jeff Suhr
The Expense and Revenue modeling features of Intellistat Budgeting and Forecasting allow you to quickly see the impact of adding, removing, or modifying employees on your annual budget. This session discusses and demonstrates how to manage and modify these models.

Intro to Intellistat Ad Hoc Reporting (Hands-On)
Presented by Ray Conti
Learn new ways to use IS Reporting to meet the unique reporting needs of your firm. This hands-on session will illustrate the ease of use of the Intellistat Report Writer. Additional topics will include adding external tables, incorporating transaction level detail, adding/concatenating fields, report sorting and formatting and report distribution.

Functional Sessions

Change Management Challenges and Solutions
Presented by Randy Steere
Practically everything we do these days involves change and many become stressed out over it. This session will identify different approaches to change management and help identify ways to tailor your approach to the situation at hand. Arguably, the firm that can manage change most effectively is the one that will survive into the future and get the most ROI from its investments.

Presented in conjunction with

Keys to Successful Software Implementations
Presented by Don Rice
The session will address important factors for a successful software implementation. We will cover the fundamentals and best practices (and some lessons learned) we see successful firms follow from getting the project approved, defining requirements, implementation, testing, pilot and final deployment.

Best Practices, Tips and Gotchas for your Financial System Conversion
Presented by Randy Steere
Implementing a new Practice Management System is the largest, most complicated project the firm will undertake. Unfortunately (or fortunately from some perspectives), most firms and staff get to do it only once. Many people will say that they wish they could start over again with the knowledge they now have on go-live. This session will begin to tell you what you need to know to avoid the pitfalls and keep you out of trouble!

Best Practices for Profitability Strategies and Cost Allocations
Presented by Jeff Suhr
In this session you will learn "Best Practices" in use today to analyze and apply profitability analysis across the business units of your firm. You will explore different Cost allocation strategies and how they can be tailored to help promote positive behavioral change within your firm's financial management function. In addition, you will see how Intellistat can now be leveraged to not only measure specific revenue metrics, but also to allocate costs throughout the firm by integrating Billing, GL, Payroll, Budgeting, Partner Compensation and HR systems.

Data Management: The Good, the Bad and the Ugly
Presented by Don Rice
The session will review best practices in data management to improve overall quality. In addition to covering key topics we will demonstrate AlertManager showing how easy it is to use to support data management activities. Topics include: what is data management, the good, bad and ugly from experiences with working with firms, defining scope, identifying your critical data, and monitoring your data.

Driving Data to Decisions: Managing the Firm Through Data Analytics (Panel)
Moderated by Jeff Suhr
As many Intellistat and Steere clients have come to realize, measuring the performance of your firm through the use of Business Intelligence and Analytics has become a primary benefit of both Intellistat and EIS-BI. This client-focused panel will highlight how firms have chosen to use this information as a part of their core management strategies.

Defining the Best Partner Comp Cost Allocation Method for *Your* Firm
Presented by Emily Hartwig and Jeff Suhr
Learn about the various methods of allocating Partner compensation for purposes of assigning direct costs within a profitability model. Delve into various Partner compensation factors to answer the question of "What's the right way?" to fully load Partner comp, while still generating useable cost rates for client and matter analysis. Discuss potential factors that could affect direct cost rates such as management & leadership responsibility, origination credit and retired Partner status.

Solving Business Challenges with Custom Applications and Programs
Presented by Bill Marquino and Bernie Hui
This session will focus on how to approach the creation of custom reports and programs. Some of the points discussed will be (a) when a custom report is appropriate; (b) how to keep the parameters as simple and intuitive as possible while still doing the job; (c) validation to catch potential user errors or issues; and (d) show all parameters on the report itself so users know exactly what they are looking at when the report is produced.

Technical Sessions

Introduction to SQL (*Hands-On*)
Presented by Allen McPheeters
SQL – Structured Query Language – is your key to retrieving data from your financial system's database. This hands-on class will teach you to write simple SQL queries using SELECT, FROM, and WHERE, as well as the SUM function and GROUP BY. It also serves as mini-seminar in Intellistat database structure.

Additional Topics in SQL: Joins and Subqueries (*Hands-On*)
Presented by Allen McPheeters
The power of a relational database only comes into focus when you can get data from more than one table at a time. This session reveals how to do just that, using inner joins, subqueries and outer joins to get useful data from a variety of tables in the Elite, Aderant, 3e, Intellistat and/or EIS databases.

System Selection Decision-Making: Comparing Aderant and 3e Data Structures
Presented by Randy Steere
Between Elite Enterprise firms being *encouraged* to move to a new system and many of the smaller accounting packages being phased out, there are more firms needing to decide on a new financial management system than ever before. If you just talk to each vendor you will end up more confused than ever! This session will help you start to compare systems on an apples-to-apples basis and offer suggestions for an approach to comparison.

Understanding Aderant Table Structures (*Hands-On*)
Presented by Randy Steere and Don Rice
As with any large, well-thought-out database, the key to understanding it is to understand the concepts and design approach that created it. This session will mine the best design concepts that are found throughout the database to help the user understand the beauty of the structure.

Writing Reports with SSRS (Hands-On)
Presented by Lynne Saffa and Allen McPheeters
Designed for the new user of SQL Server Reporting Services, this class will introduce the attendee to SSRS and teach how to create and publish basic reports using the Report Builder feature in SSRS.

Ways to Integrate Your Financial Systems with SSRS
Presented by Bernie Hui
Learn how to make delivery and access of SSRS reports easier for your users. We will provide an overview of the SSRS Web Service and show examples of how to embed it within intranet web pages, email alerts and financial applications. We will discuss how to prepopulate report parameters in the SSRS Web Service for targeted users while also reviewing SSRS security features.

Advanced Excel (*Hands-On*)
Presented by Keith Lent
This will be an interactive session to illustrate how Excel is used to provide meaningful reporting to firm management, as well as provide techniques to manipulate data using formulas and simple macros.

Note that individual sessions may be added, combined or omitted.
Additional sessions not listed will be available on a 1:1 basis in our Meet the Experts room.
Presenters are also subject to change.