



# Case study: PNC Bank sees quick cost savings and efficiencies with LegalVIEW® BillAnalyzer for better bill review

## SUMMARY

The 250-person legal operations team at PNC Financial Services Group, Inc., one of the largest diversified financial services institutions in the US, were long-time users of TyMetrix 360° from Wolters Kluwer ELM Solutions. They leveraged the spend and matter management platform to establish workflows and automated rules to gain efficiencies throughout their attorney-led bill review processes. The team recognized the opportunity to further improve billing guideline compliance to drive cost savings and sought to address the opportunity through the use of AI-led legal technologies.

## CHALLENGE

- Generate workflow efficiencies through the reduction of attorney-led, manual bill review processes
- Leverage AI and machine learning to increase billing guideline compliance and recognize cost savings
- Enhance data quality to surface additional trends and insights for improved decision-making

## SOLUTION

The introduction of LegalVIEW BillAnalyzer presented the opportunity to grow PNC's investment in e-billing and advance their technological maturity. The solution's AI engine automates the time-consuming process of identifying likely violations. Flagged line items are further analyzed by a team of experienced legal professionals who also handle the appeals process. Feeding results back into the system supports ongoing refinements that allow PNC's AI engine to get smarter over time. The availability of KPIs and dashboards supported strong stakeholder communication to convey the program's success and identify opportunities for continued optimization.



“Measuring key metrics has allowed us to maintain clear, easy-to-read reporting to our key stakeholders to communicate program benefits, outcomes, and greatest points of success.”

## BENEFIT

### 1. Improved billing guideline compliance and immediate cost savings

The team of legal, financial, and technical stakeholders at PNC reviewed the cost-saving promises of LegalVIEW BillAnalyzer weighed against the technical demands of implementation. Development of a clear project plan alongside a sound financial projection spurred the team into action. Following an implementation with a strong focus on internal and external communication, attorney-led bill review was replaced with automated validation of invoice format and compliance with rates, fees, and other billing items. Savings were generated in the first month, with promising expectations for ongoing results.

### 2. Data-driven internal stakeholder engagement and external vendor collaboration

Clean invoice line items established the foundation necessary for improved forecasting, identification of alternative fee arrangements (AFAs), and proactive tracking of program metrics. Insights into net savings, total appeals, adjustment reason by firm, and invoice cycle time allowed stakeholder clarity from all angles. These internal improvements, combined with the power of Wolters Kluwer ELM Solutions' LegalVIEW® data warehouse of \$150+ billion in anonymized legal data, provided the backing for a focus on vendor collaboration. Annual meetings with key firms saw more comprehensive, data-driven feedback to identify opportunities for strengthened relationships and continued program improvements.

### 3. Alignment with broader legal operations and business objectives

With the initial focus areas of efficiency, cost savings, and billing guideline compliance well established, the team has begun to identify further ways in which LegalVIEW BillAnalyzer can positively impact the legal operations and business objectives of PNC. Greater data transparency relative to timekeeper diversity and firm performance has allowed for progress on these key initiatives. Again, data quality represents the opportunity to draw more accurate and fair comparisons to meet program objectives that extend beyond legal bill review.



“We were successful in meeting first-year cost-saving expectations.”

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