

## Autodesk improves real-time monitoring of legal spending and accuracy of budget forecasts

"Our improved processes put us in a better position to glean data insights that empower more strategic decision-making across our department."

Charles Wainwright, Outside Counsel and Financial Manager, Legal Operations Department, Autodesk

**The corporate law department at Autodesk, Inc., a global leader in providing software and services for the architecture, engineering, construction, media and entertainment, and manufacturing industries, used multiple information systems to track accruals, budget forecasts and actual legal spend.**

### Manual processes create inaccuracies

Unfortunately, these disparate systems were not integrated, so the department was forced to use an inefficient process to obtain the data insights it needed.

"Our process for aggregating key financial data was highly manual," explains Charles Wainwright, Outside Counsel and Financial Manager for Autodesk's Legal Operations Department. "We emailed each of our outside law firms every 90 days to ask them for a forward-looking billing forecast for the next quarter. It was not uncommon for some of these firms to miss the email or forget to provide the data we need, which required further follow-up."

Once the outside counsel forecast data was received, the Autodesk legal operations team would extract data from various other reports on accruals and actual spend, then assemble the combined data into a spreadsheet for review by the in-house attorneys.

"Meanwhile, we had a matter management tool that told us what invoices had been submitted by outside counsel, but we lacked a tool to pull our accruals and forecasts data into the same view," says Wainwright. "This informal process often led to inaccurate or incomplete budget forecasts that varied quite a bit from the actual spend."

The challenge Autodesk's law department sought to tackle was the difficulty of getting their hands around their actual legal spend and having an accurate forecast for future spending.

### Three key objectives

"Our goal was to improve our internal processes with the assistance of a legal analytics tool that would deliver a new structure for us to evaluate spend, accruals, and forecasts within the same view," says Nataly Kozanian, Project Manager for Autodesk's Legal Operations Department. "We were confident that obtaining clearer visibility into this data—and the ability to modify the data based on updated reports—would help us deliver richer financial insights for the department's management team."

The legal operations team also sought to improve the timeliness of the financial data they obtained and evaluated. For example, their goal was to produce "Forecast vs. Actual" reports for outside counsel spending



in real-time so the in-house attorneys could better manage that spend before any significant variances began to accelerate.

The final objective was to increase the budget forecast accuracy throughout the year. "Our CEO wanted all department budgets landing within two percent of their forecasts for the year," says Kozanian. "It was clear the legal team could benefit from the support of a legal analytics tool that would make their processes more efficient."

Autodesk's legal operations professionals already worked successfully with Harbor and went to them for a possible solution.

### A streamlined approach to data collection

Harbor's CounselCommand is an enterprise legal analytics solution developed by a team of Harbor experts with decades of experience working with corporate law departments and law firms on their most pressing operational challenges.

"It became clear to our legal ops team that CounselCommand could bring the various department budgeting data streams into a single view," says Wainwright.

The initial project for Autodesk was to create a new web form for collecting outside counsel billing forecasts. Autodesk legal operations team members helped create a simple online form that all of Autodesk's law firms must submit quarterly, providing billing forecasts for the quarter ahead.

CounselCommand then ingests that data and key department spending reports, creating a streamlined view for Autodesk professionals. The Autodesk legal

operations team then reviews, analyzes and cleans the submitted law firm data and follows up as necessary to clarify any missing details.

### Improved accuracy and more effective spending

Using CounselCommand, Autodesk's corporate law department has seen its forecast accuracy go from landing budget within 11 percent of actual spend to just under two percent, a dramatic improvement in a few years. "The ability to release previous period accruals, and match forecasts with actual spending and accruals, has been a huge improvement for our department," says Kozanian.

"Our new automated web form has made this workflow much more efficient to implement and manage," says Wainwright. This has created substantial time savings each quarter for Autodesk's financial analysts, with forecasting reduced from 16 to eight hours and accruals reduced from 69 to 22 hours.

"CounselCommand enables us to move quickly into the data analysis process to obtain greater visibility into spending in a shorter amount of time," says Kozanian.

"The platform lets us access 'moment in time' spend data," says Wainwright. "This increased timeliness means we have more accurate information to extrapolate budget trends and provide our law department management team with insights for strategic decision-making."

"I have worked at several large tech companies, and this is the first time that I've ever been able to deploy a legal analytics solution that pulls together all of the key data fields we need to forecast legal spending more accurately," says Kozanian.

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*This engagement was executed by HBR Consulting, one of the companies that merged to form Harbor.*

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