

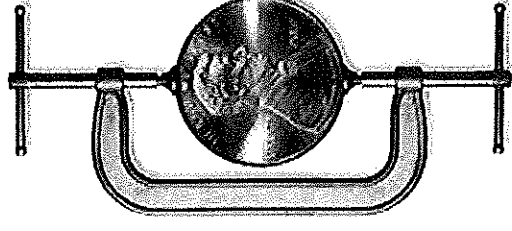
HOW TO BILL EFFECTIVELY

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THE PROBLEM

- You have a lot of demands on your time.
- Billing does not seem like “real” work but is absolutely vital to the business.
- Our jobs are dependent on the ability to sell our time.
- The people who pay are looking to squeeze every penny (and pay others to do so).



WHAT TIME IS BILLABLE?

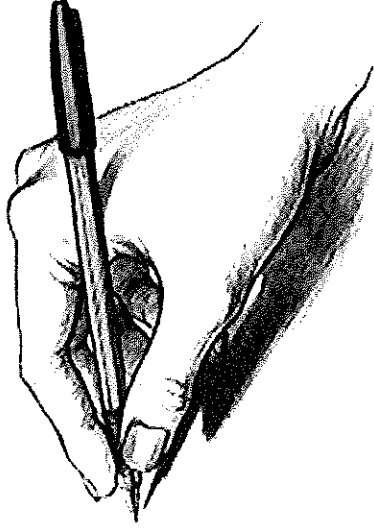
- You can bill for time that is “(1) ...substantive and not clerical in nature; and (2) consist of tasks and services which otherwise would be performed by an attorney.”

- **NFPA Informal Ethics and Disciplinary Opinion**

No. 95-4

THE SOLUTION

- Bill thoughtfully
- Follow guidelines
- Sell your work to the client
- Sell your work a person looking to cut your time



BUT PRACTICALLY, HOW DO YOU DO IT?

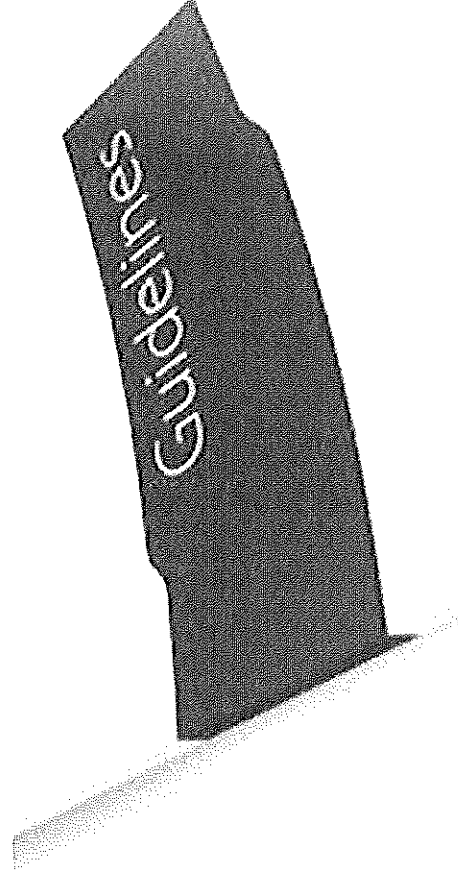
- Learn and adhere to your client's billing guidelines.
- Bill your time as you do your work.
- Tell the who, what, how, and why (When should be on your sheet). Identify the subject matter of your work.
- Add information until the reader understands what you did.

BUT PRACTICALLY, HOW DO YOU DO IT? (CON'T)

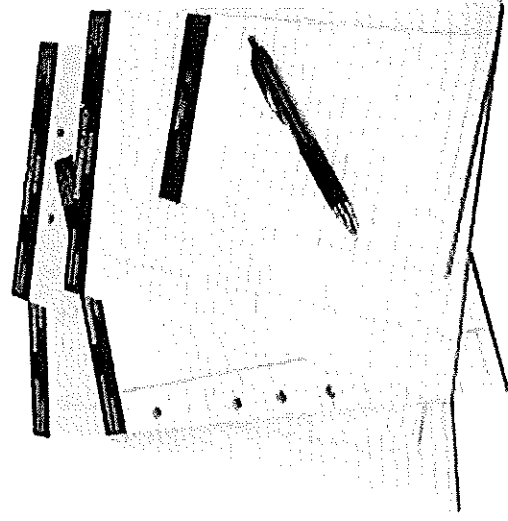
- Identify the utility of your work.
- Bill each task (no block billing).
- Don't bill for getting up to speed.
- Record "zero" entries.

LEARN AND ADHERE TO YOUR CLIENT'S BILLING GUIDELINES

- Insurance Companies
- Clients
- Common Guidelines
 - No Conferences
 - No Filing
 - No block billing



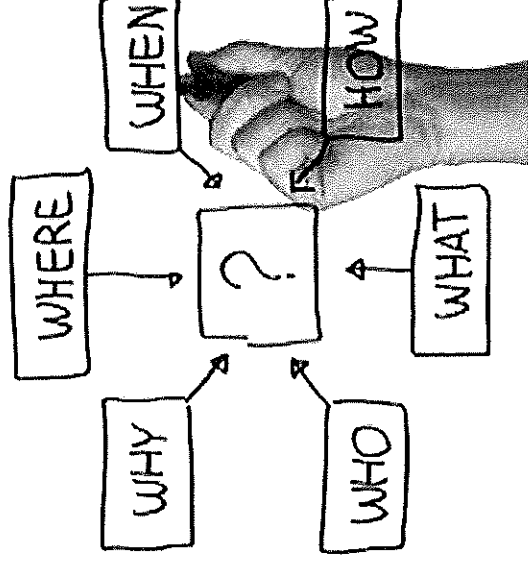
BILL YOUR TIME AS YOU DO YOUR WORK



- There is too much to remember if you don't - Emails, Letters, Pleadings, Briefs, Documents, Research, Calls, Meetings
- Double-benefit: (i) capture more of your time and (ii) use less of your time to do so

TELL THE WHO, WHAT, HOW, AND WHY (WHEN SHOULD BE ON YOUR SHEET)

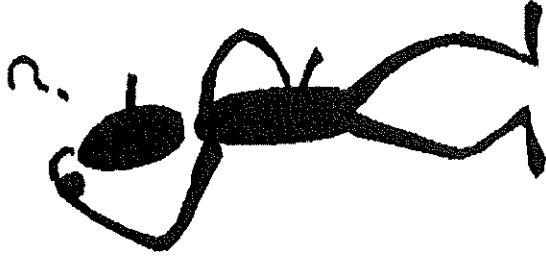
- The people reading your bills do not know the context of your work when you did it.
- Second double-benefit: (i) justifies the work and (ii) makes a record of the fact that you did the work (trial example)



ADD INFORMATION UNTIL THE READER UNDERSTANDS WHAT YOU DID

- The proportionality of time
- Which of these seems most legitimate?
 - Reviewed documents received from Plaintiff
 - Rev'd medical records produced by Plaintiff
 - Rev'd medical records produced by Plaintiff in response to RFPs from co-defendant
 - Rev'd 1,000 medical records from Acme Hospital produced by Plaintiff John Doe in response to co-defendant's RFPs

IDENTIFY THE UTILITY OF YOUR WORK



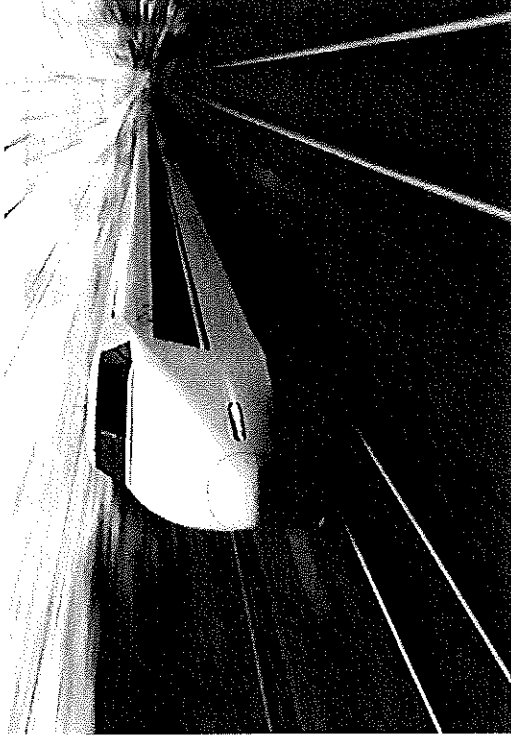
- Rev'd 1,000 medical records from Acme Hospital produced by Plaintiff John Doe in response to co-defendant's RFPs
- *Analyzed 1,000 pages of medical records from Acme Hospital produced by Plaintiff John Doe in response to co-defendant's RFPs for possible use in motion for summary judgment on liability*

BILL EACH TASK (NO BLOCK BILLING)

- Block billing is the practice of including multiple tasks in one time entry.
- Most companies will not accept block billing.
- Block billing is less clear than billing for each individual tasks.
- Block billing risks having whole blocks, and not just entries, cut.
- Block billing may reduce your billable time.



DON'T BILL FOR GETTING UP TO SPEED



- Fair or not, clients do not want to pay for you to get up to speed on files
- Entries that merely indicate that you are learning the file are easy to cut. Instead, identify the purpose of your work and apply the time to that task (e.g., Are you reviewing the file or drafting discovery requests?) .

RECORD “ZERO” ENTRIES

- Everybody likes something for free.
- “Free” entries help to justify the work that you do for pay.



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- **10 Billing Mistakes, Will Your Legal Bills Withstand Client Scrutiny?, Sally Kane, <http://legalcareers.about.com/od/practicetips/tp/10-Billing-Mistakes.htm>**
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WRAP UP

- The unifying concept – We all sell our time. Bill your work to be read and understood by the client, keeping in mind that the party paying the bill will scrutinize your bills carefully.
- Effective billing helps you, the people with whom you work, and your firm.