

The original All-in-One®
Software Suite for
Case and Financial Management



Business Intelligence Viewer

Features

- **Real-Time KPI Monitoring:** Track financial and production Key Performance Indicators (KPIs) such as revenues, profits, expenses, billable hours, write-offs, and more.
- **Historical Data Access:** Analyze up to three+ years of transactions, aggregated and transformed into actionable insights.
- **Operational Optimization:** Identify inefficiencies, improve client service, reduce costs, and increase productivity.
- **Drill-Down Analytics:** Gain a firm-wide or granular view across metrics, by attorney, client, department, or time period.
- **Always Up-To-Date:** Say goodbye to printed reports; all data is updated and available online for immediate use.

Transforming Data into Actionable Insight

PerfectLaw's Business Intelligence (BI) Viewer allows law firms to convert raw data into meaningful, strategic insights. BI encompasses a range of tools and techniques designed to support better decision-making by presenting historical, current, and predictive views of business operations. By leveraging this technology, firms can address business challenges with data-backed solutions, enabling more effective and profitable decisions.

The BI Viewer works with your financial and practice management databases, allowing you to:

- Monitor key metrics for both production, and finance.
- Visualize patterns and trends through interactive charts and KPIs.
- Drill down to granular insights on timekeepers, clients, practice areas, and more.
- View financial reports, they are always online and up-to-date.

Who Uses the BI Viewer?

The BI Viewer supports multiple roles across the firm, each with tailored experiences based on their needs and technical skillsets:

1. Information Consumers

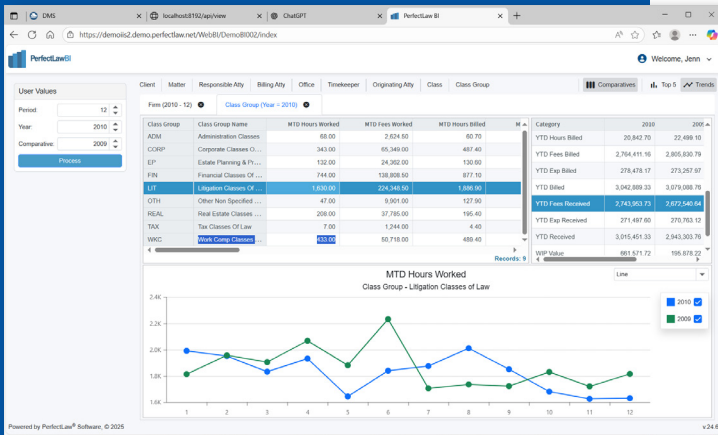
- **Typical Users:** Partners, senior executives, administrators.
- **Usage:** View pre-built dashboards and reports to inform decisions, set goals, and review performance metrics.

2. Middle Users

- **Typical Users:** Practice managers, accountants.
- **Usage:** Create custom reports using pre-configured tools and data models, no coding or SQL required.

PERFECTLAW®
ALL-IN-ONE® SOFTWARE

w w w . p e r f e c t l a w . c o m
1 . 8 0 0 . 7 4 9 . 6 2 0 0



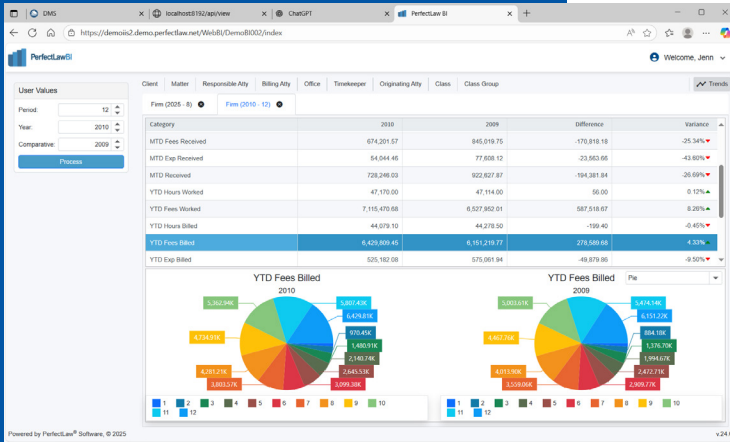
3. Power Users

- Typical Users: IT staff, developers, vendors.
- Usage: Build and maintain advanced reporting tools, manage access and distribution, and determine reporting scope for different users.

Primary Use Cases

- Strategic Planning: Set budgets, operational goals, and performance benchmarks.
- Performance Analysis: Evaluate compensation, promotions, and productivity.
- Operational Oversight: Schedule, track, and account for resources and workflows.
- Forecasting: Predict future performance and financial trends to guide decision-making.

The BI Viewer is more than a reporting tool, it's your firm's command center for insight-driven performance management. Empower every level of your organization with the tools to plan smarter, act faster, and achieve better outcome.



Functions

Interactive Performance Analysis

- Explore firm performance interactively with advanced drill-down, sort, and filter options.
- Navigate seamlessly between attorneys, clients, and practice areas in any order.
- Identify top-performing attorneys, clients, or practice areas based on selected metrics.

Benefits

Data-Driven Decision Making

- Support critical business decisions with accurate and actionable performance data.
- Quickly answer high-value questions:
 - o How are we performing as a firm?
 - o What are the receipts or profits for a given attorney, client, or practice area?
 - o Which billing or compensation rates should be adjusted?
 - o Should we expand or reduce capacity to improve profitability?

Operational Insight and Optimization

- Visualize and compare KPMs to gain deeper insights into operations.
- Detect and analyze performance trends, both positive and negative.
- Identify areas of inefficiency and take corrective action proactively.
- Operational Efficiency: Reduce report preparation time, identify inefficiencies, and align execution with firm-wide objectives.

Trend Visualization and Benchmarking

- Visualize year-over-year data with trend diagrams showing absolute variance and percentage change.
- Compare entities side-by-side for performance benchmarking.
- Toggle trend analysis features on/off and choose between standard or 12x12 (year vs prior year) comparison views.

Flexible Output and Report Generation

- Dashboards automatically refresh for real-time performance tracking.
- Share presentation-ready reports and charts.
- Export reports and dashboards to Excel.
- Publish and share information easily via email.

PERFECTLAW[®]
ALL-IN-ONE[®] SOFTWARE

Corporate Headquarters
PerfectLaw[®] Software
6100 Blue Lagoon Drive
Suite 350
Miami, Florida 33126

Phone: 800.749.6200
Email: info@perfectlaw.com
Web: www.perfectlaw.com