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# SYMPOSIUM 2025

## Metrics, Reporting, and Maturity Models

Measuring What Matters



# Why?

## Knowledge is Power

Identifying and utilizing the **right data points** allows us to increase efficiencies and build strategy for growth.

Ultimately, the more we **know**, the more we can **achieve**.

**Monthly & Yearly Trends**  
*Consistent and structured reporting ensures accuracy in trend reporting.*

**Budgeting**  
*People & Systems  
ROI Across Vendors*

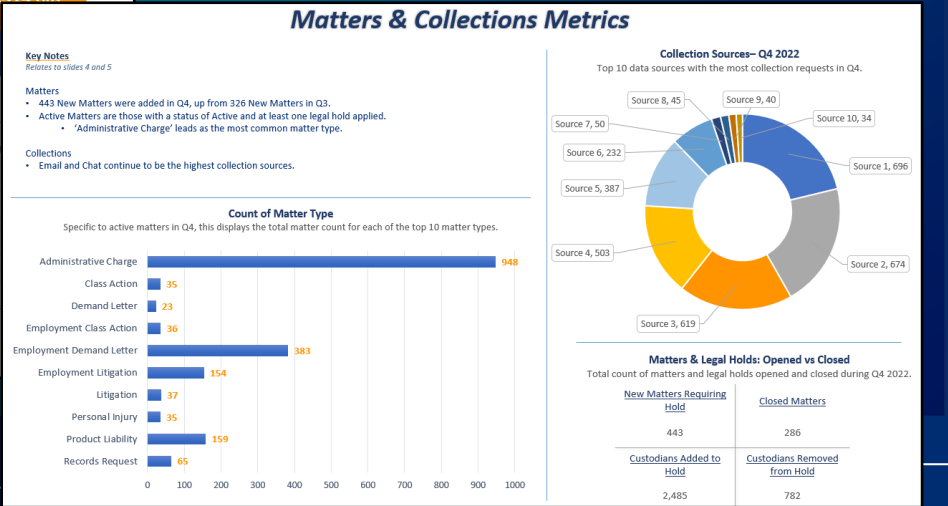
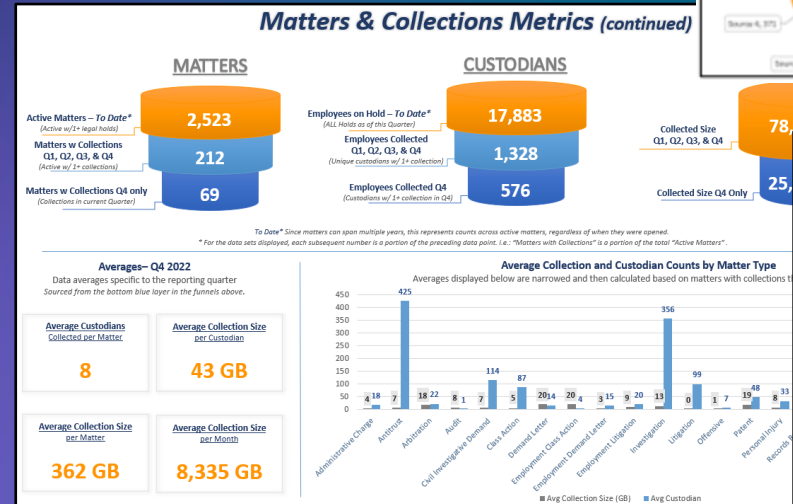
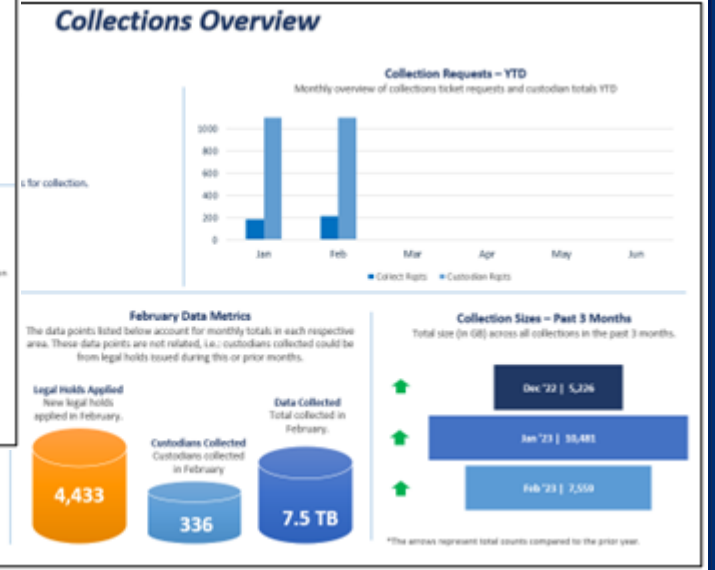
**Team Insights**  
*Identify: top service needs, gaps in staff, high/low performers, untapped skills, etc.*

**Team Growth & Planning**  
*Identify and set goals for professional developmental growth, as well as by service and/or teams.*

**Communication & Knowledge Sharing**  
*Consistent and measurable supports dashboards and reporting that align teams or cross functional partners.*

# What?

- Time/Utilization
- Metrics across matters
- Legal Hold
- Collections – Volume and number
- Data specific to practice area:
  - Claims,
  - IP docketing
  - Contracts, etc.



# How?

## Time Entry



### Consistent Time Entry

Detailed to Service & Task where possible.

Utilization Trends by Team & Service

## Reporting



### Monthly & Quarterly Reporting

Year End Reporting

YOY Analysis

## Strategy & Growth



Periodic Use Case reporting:  
*Deeper analysis into time/cost factors with process.*

Strategic Planning & Continuous Improvement Plans.

## Maturity Models



Baselines & Goals  
*Once you have baselines set and can develop incremental improvement goals*

## Legal Applications



What's Working? What's Not?

Full Functionality?

Manual vs Automation

Speed Issues?

Cost Comparison

# Final Thoughts

Metrics, Reporting, and Maturity Models: Measuring What Matters

# Questions

Metrics, Reporting, and Maturity Models: Measuring What Matters