
An introduction to *StaffingMatters*

Silver Bullet

Soundience

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StaffingMatters in context

- Think for a moment about the information systems you use most. You probably bring to mind the billing system, the system that monitors utilisation, the management accounts that measure profit. These systems are important, and you couldn't run the business without them. But they each have an important characteristic: they all measure the past - time sheets entered, and bills sent to clients, last week. Certainly, you need to track important performance measures such as utilisation and client billings. But you can't manage the business successfully just by looking backwards. Yes, last week's utilisation is important to know, but the business challenge is actively to manage next week's; yes, you must track the bills sent to clients last month, and those write-offs that will inevitably find their way into the P&L account, but the business challenge is actively to maximise billings, and minimise the write-offs, next week.
- So we trust that you will find this brief document not only interesting but important, for *StaffingMatters* is an information system that looks **forward** not backward, an information system that helps you **actively manage the future**, rather than just track the past.
- As explained on the following pages, *StaffingMatters* is a web-based system which captures the most important operational aspect of your business - how everyone in the firm is likely to be spending their time. *StaffingMatters* therefore provides you with the key information to enable you to manage:
 - how individual matters are staffed, so that clients receive the very best service...
 - ...at the right price to the client...
 - ...and the right profit to the firm...
 - ...whilst giving your staff the career development opportunities they seek...
 - ...respecting their work-life balance...
 - ...in the context of the needs of both the firm and the client...
 - ...so optimising, overall, the total capacity of the firm, thereby maximising utilisation - and profit.

StaffingMatters - an overview

- The centre-piece of *StaffingMatters* is the **Availability Timeline**, which - as illustrated on page 3 - shows a visual representation of the future workload of each individual in a community - typically a 'Group' or 'Department' comprising, say, 10 partners and the corresponding fee-earning and support staff.
- Different categories of activity are displayed in different colours: definite client-chargeable work (red), contingent client chargeable work (red-and-white stripes), administration and business development (dark blue), training (pale blue) and holiday (pale green).
- A quick glance at the **Availability Timeline** therefore provides an up-to-the-minute view of what everyone in the community expects to be doing over the next few weeks. It therefore provides essential information relating to the optimisation of capacity (and hence utilisation) for the currently known workload, and also on who is available to work on any new matters for which the partners receive instructions.
- The information from which the **Availability Timeline** is compiled comes from two sources. Firstly, information personal to any individual - such as that relating to, say, training and holidays - is entered and kept up-to-date by the appropriate individual. Secondly, information relating to client chargeable work originates from the corresponding **matter plan**, a form of bar-chart which specifies the tasks to be carried out and who has been allocated to each task. Some examples of **matter plans** are shown on pages 6, 7 and 8.
- Also shown on the **Availability Timeline** - towards the left-hand side of the illustration on page 3 - are three columns of 'traffic lights'. These are used to indicate short-term availability for the rest of 'today' and the following two working days. This allows *StaffingMatters* to be used as a powerful way of communicating short-term availability around the community.
- Using *StaffingMatters* therefore provides the partner team with all the right information to manage the future. But that's not all. *StaffingMatters* also encourages best-practice project management and project planning, as evidenced by each matter plan. Not only is this critical in the context of delivering the very best client service, but it is also the key to pricing, margin control, teamwork and the avoidance of write-offs.



Staffing Matters

Group Availability Messages About Me My Availability Clients Matters Colleagues

Availability Timeline

>> << [Icons] Department: [SB] ?

This screen, the *Availability Timeline*, provides an overview of what people are likely to be doing over the next few weeks. Different types of activity are indicated by different colours...

Name	August																															Util
	Tod	Ton	Nxt	04	05	06	07	08	09	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24	25	26	27	28	29	30	31	
Wilson, Richard P (SB, London)	●	●	●	█	█	█	█	█	█	█	█	█	█	█	█	█	█	█	█	█	█	█	█	█	█	█	█	█	█	█	█	90%
Frost, Edward SA (SB, Calgary)	🏠	🏠	🏠	█	█	█	█	█	█	█	█	█	█	█	█	█	█	█	█	█	█	█	█	█	█	█	█	█	█	█	█	53%
Miller, Nicola SA (SB, Calgary)	●	●	●	█	█	█	█	█	█	█	█	█	█	█	█	█	█	█	█	█	█	█	█	█	█	█	█	█	█	█	█	0%
Welsh, Alison SA (SB, London)	●	●	🏠	█	█	█	█	█	█	█	█	█	█	█	█	█	█	█	█	█	█	█	█	█	█	█	█	█	█	█	█	99%
Bicket, Henry A (SB, London)	●	●	●	█	█	█	█	█	█	█	█	█	█	█	█	█	█	█	█	█	█	█	█	█	█	█	█	█	█	█	█	106%
Henderson, Alex A (SB, London)	●	●	●	█	█	█	█	█	█	█	█	█	█	█	█	█	█	█	█	█	█	█	█	█	█	█	█	█	█	█	█	95%
Jack, Daniel A (SB, Calgary)	●	●	●	█	█	█	█	█	█	█	█	█	█	█	█	█	█	█	█	█	█	█	█	█	█	█	█	█	█	█	█	14%
Plender, George A (SB, London)	●	●	●	█	█	█	█	█	█	█	█	█	█	█	█	█	█	█	█	█	█	█	█	█	█	█	█	█	█	█	█	42%

Chargeable time on matters (red)

Training, study leave... (pale blue)

Contingent chargeable time on matters (red-and-white stripes)

Holiday, maternity leave, part-time working... (pale green)

Business development... (dark blue)

"Traffic lights" indicate short-term availability, in the office or at home

The yellow vertical stripe indicates the current day

This Monday is a bank holiday

Each individual has his or her own personal pages, including this list of the matters he or she is assigned to...



Staffing Matters

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Lead Associate Matters

Client	Matter name	Dates and Status	Matter Partner	Team	Tasks (staffed)	Total hours
Client C	Court hearing	4/08 to 15/08 2008 (12 days) Active	Patrick McKenna (SB)	Alex Henderson   : 8.0 h/d until 15/08/2008 Patrick McKenna: 8.0 h/d until 15/08/2008	1 (1)	160

1 matter

Staffed On

Client	Matter name	Dates and Status	Matter Partner	Team	Tasks (staffed)	Total hours
Client E	Competition law advice: Advice regarding potential merger	28/07 to 11/09 2008 (46 days) Active	Dennis Sherwood (SB)	Alex Henderson: 3.3 h/d until 11/09/2008 Sam Dawson   : 4.1 h/d until 11/09/2008 Dennis Sherwood: 2.7 h/d until 16/09/2008	7 (7)	324

1 matter

Notes:  indicates lead associate,  indicates update access to matter. Hours per day are averaged from days person works on that matter *on or after today* (04/08/2008). Starting date is shown in green, if activity starts in 7 days or later.

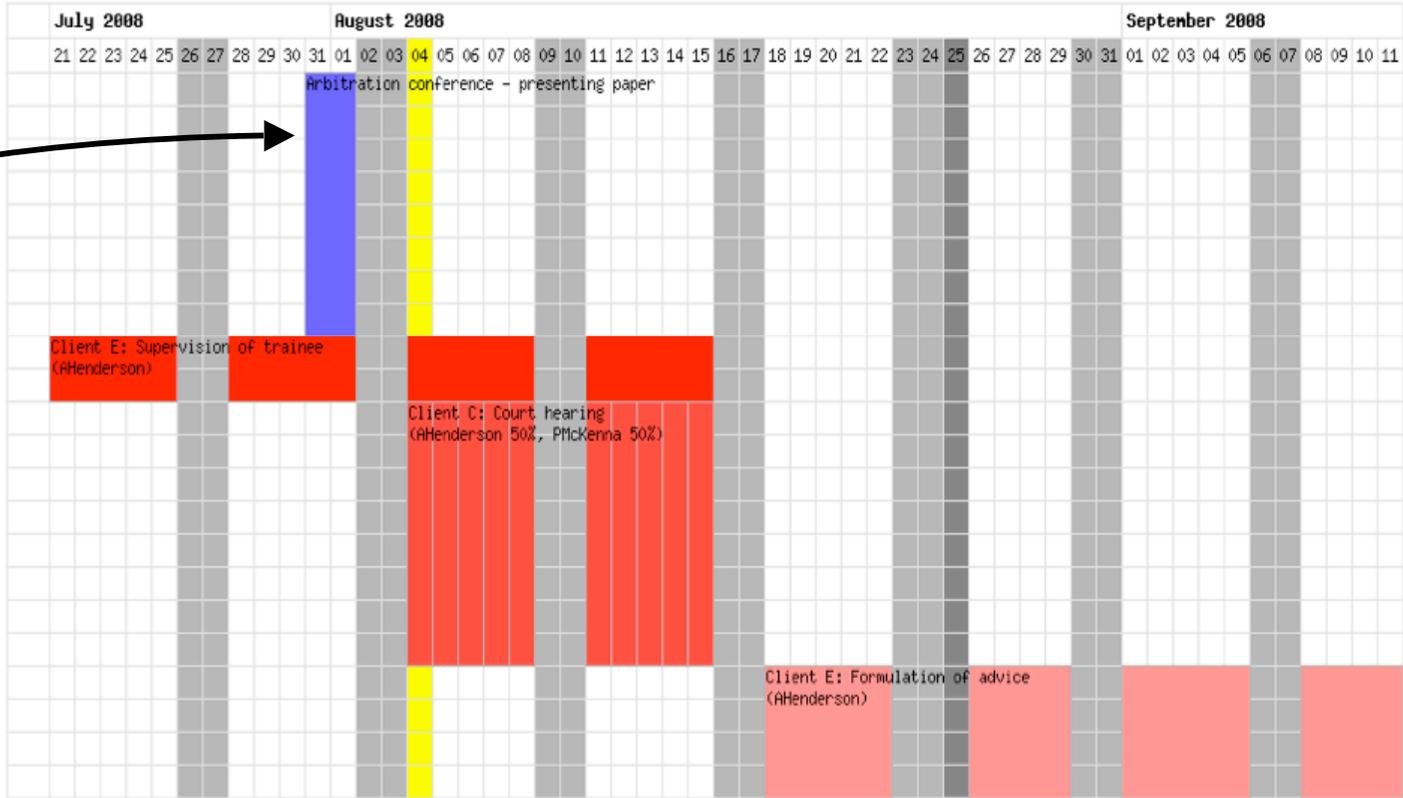
...as well as an individual Loading Chart...



Loading Chart for Alex Henderson

Basic info Loading Calendar Development Skills Matters

Icons: List, Alphabet, Print, Chart, Menu



Alex also recently had two days charged to Business Development

These are each of the matters on which Alex is working.

Each vertical block represents one hour.

This is an example of a matter plan...



Matter "Arbitration"

Matter partner: Patrick McKenna

Lead associate: Edward Frost

Also accessible by: Richard Wilson, Edward Frost

Client: Client A (sector Asset management and investment funds)

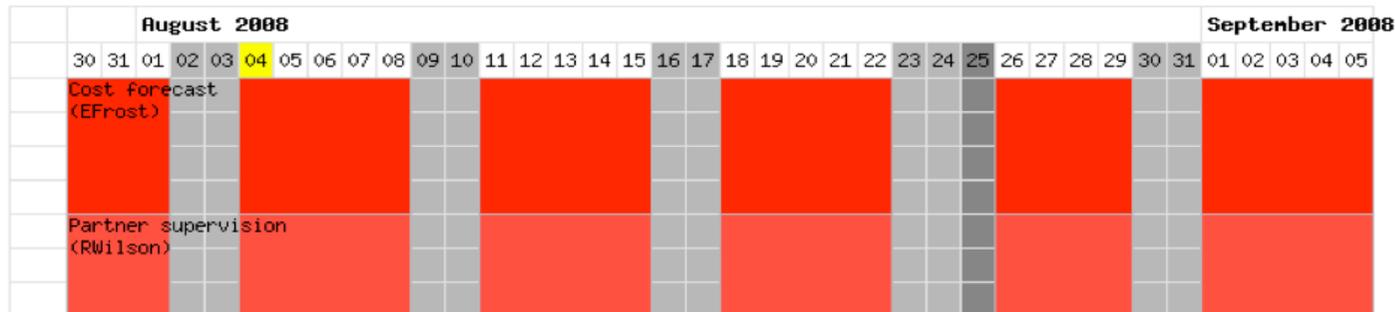
Description: Mortgage meltdown - class action defense

Dates: 30/07 to 5/09 2008 (38 days)

Status: Active

Total hours: 189.0

Work Plan



...in which Edward and Richard are estimated to be working for 4 and 3 hours a day respectively, on average, from 30th July until 5th September.

Here is a second example...



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Matter "Real estate advice"

Matter partner: **Richard Wilson**

Lead associate: **Daniel Jack**

Also accessible by: **Pat Jones, Daniel Jack** [Grant permissions](#) [?](#)

Client: **Client C** (sector Government, regulatory and public services)

Description: this is a test

Dates: 30/07 to 19/09 2008 (52 days)

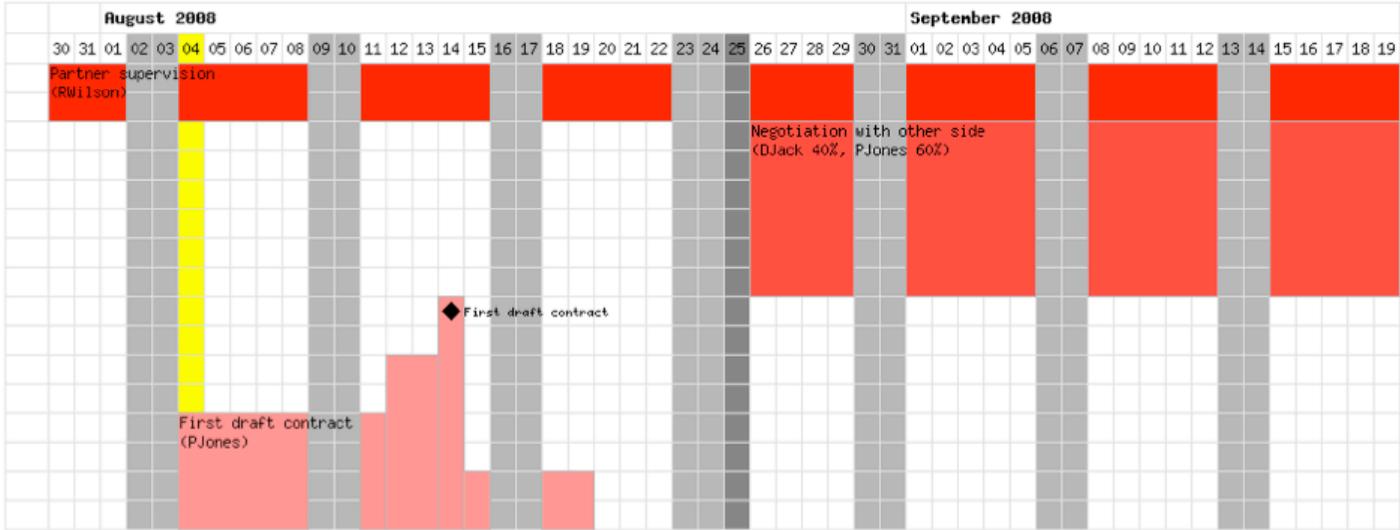
Status: **Active**

Total hours: 238.0

[Edit this](#) [Delete matter](#)

Work Plan

[Gantt](#) [A0c](#) [Print](#) [Share](#) [Help](#)



...which shows the 'profile' representing the build-up of work before the tabling of the first draft contract.

...and a third, more complex one.



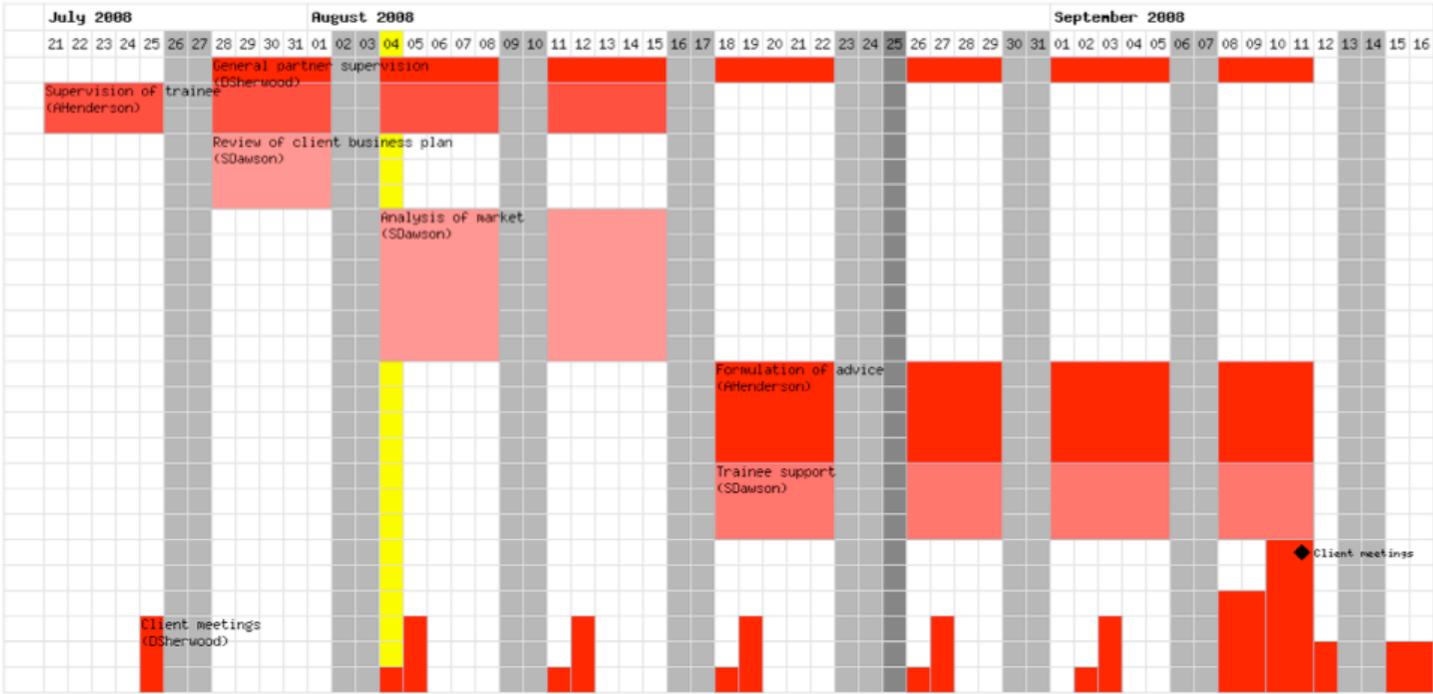
Staffing Matters

Group Availability Messages About Me My Availability Clients Matters Colleagues

Matter "Competition law advice"

Matter partner: Dennis Sherwood
Lead associate: Sam Dawson
Also accessible by: Alex Henderson, Sam Dawson [Grant permissions](#) [?](#)
Client: Client E (sector Pharmaceuticals, biotechnology and healthcare)
Description: Advice regarding potential merger
Dates: 28/07 to 11/09 2008 (46 days)
Status: Active
Total hours: 324.0
[Edit this](#) [Delete matter](#)

Work Plan



Every matter plan has a corresponding financial plan...



Group Availability Messages About Me My Availability Clients Matters Colleagues

Matter "Arbitration"

Matter partner: **Patrick McKenna**

Lead associate: **Edward Frost**

Also accessible by: **Richard Wilson, Edward Frost**

Client: **Client A** (sector **Asset management and investment funds**)

Description: Mortgage meltdown - class action defense

Dates: 30/07 to 5/09 2008 (38 days)

Status: **Active**

Total hours: 189.0

Cost Estimate

Name	Hourly Rate	07/2008	08/2008	09/2008	Subtotal
Wilson, Richard (P, SB)	<input type="text" value="640.0"/>	6 3,840.00	60 38,400.00	15 9,600.00	81 51,840.00
Frost, Edward (SA, SB)	<input type="text" value="535.0"/>	8 4,280.00	80 42,800.00	20 10,700.00	108 57,780.00
Subtotal:		14 8,120.00	140 81,200.00	35 20,300.00	189 109,620.00

Note: numbers in blue are hours. Type-in a new rate and hit Enter to recalculate (values are saved for this session only)

...as illustrated by this example, which shows, for the matter plan depicted on page 6, the expected fees for each calendar month.

This is how staff are allocated to activities...



Group Availability Messages About Me My Availability Clients Matters Colleagues

Task "Document review"

Matter and Client: **Arbitration (Client A)**
Matter dates: 30/07 to 5/09 2008 (38 days)
Task dates: 11/08 to 15/08 2008 (5 days)
Hours per day: 4
This task is currently **unassigned**

There is a need to carry out a document review, which is estimated to require about 4 hours a day over five days, from 11th August to 15th August.

This activity needs to be carried out by an Associate

Please select person(s) to assign ?

Filter by Department: [SB] Office: [(select)] Skill: [(select)] Grade: [A]

Name (click for info)	Share %	11	12	13	14	15
<input type="checkbox"/> Bicket, Henry A - SB, London	[]	Yellow	Yellow	Yellow	Yellow	Yellow
<input type="checkbox"/> Henderson, Alex A - SB, London	[]	Red	Red	Red	Red	Red
<input type="checkbox"/> Jack, Daniel A - SB, Calgary	[]	Yellow	Yellow	Yellow	Yellow	Yellow
<input checked="" type="checkbox"/> Plender, George A - SB, London	100	Green	Green	Green	Green	Green

This grid shows, for the required time period, all the Associates. *StaffingMatters* "knows" about each individual's prior commitments, and then adds the 4 hours required each day for the new activity. If the resulting sum is equal to, or less than, 8, the grid colour is green; if between 8 and 12, yellow; if over 12, red.

George Plender is available, and so is assigned to the activity.

StaffingMatters - for more information

- We fully recognise that a document such as this cannot capture not only the richness of *StaffingMatters*, but also how easy it is to use.
- We would therefore be very pleased to visit to give you a full demonstration, and to explore with you how *StaffingMatters* can best be used to meet your own firm's needs.
- As a web-based system, *StaffingMatters* is very easy to demonstrate, and also to implement: a community of, say, 10 partners and the associated staff could be up-and-running in a matter of a few weeks.
- So, for further information, please contact
 - Dennis Sherwood, 07715-047947, dennis@silverbulletmachine.com
 - Andreas Kaempf, 07786-510720, andreas.kaempf@soundience.com

Silver Bullet

The Silver Bullet Machine Manufacturing Company Limited

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