

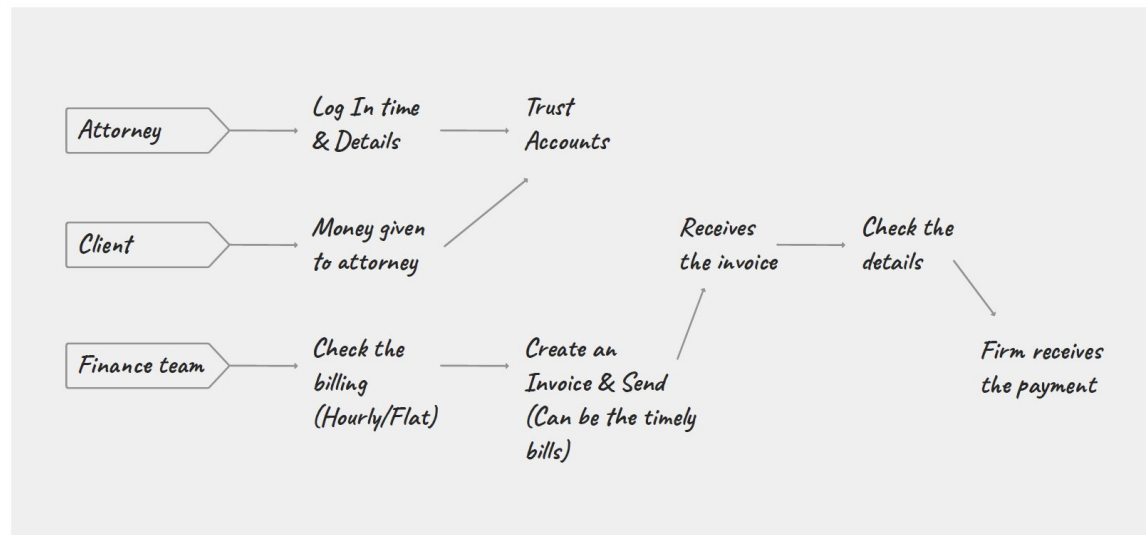
PROBLEM SOLVING USING DOUBLE DIAMOND STRATEGY



Oct 26, 2020

Problem Statement

From the brainstorming we got the broad spectrum of what are the elements we are dealing with and from the persona we got the primary user we are focusing. But we need to pin point the flow of the process to understand the tasks they are performing on each stages. This simple diagram will help us to represent lots of complexity, your map will show how the users are moving through your platform. At the end we will be able to narrow the broad challenge into a specific target for the sprint.



Persona



About

Qualifications: 3 years experience as legal billing specialist

Work environment: Indoor billing specialist. Working with manual billing system and some of things done with defined process in computer

Equipment: Computer, Printer, phone calls

Works with...

Internal: Works With attorney, secretaries, administrative staff members

External: clients, firm clients

Laura D'souza

legal billing specialist

Main Goals

User-friendly applications
Quick and easy invoicing
Generate descriptive efficient invoice fast, accurate and resolve all billing issues in single application
even providing you with state-of-the art security measures to keep your client's information safe from cyber threats.
Expense tracking
Over 30 reporting capabilities
Credit card processing integrations
Managing trust account and visibility of trust funds

Needs

Provide a detailed description of one need the persona is experiencing related to his/her work
Increase profitability
Improve communication with clients
Efficiency in completing complex matters
Not to lose track of billable hours
Manage trust money in separate ledgers under each specific matter

Job Responsibilities

Essentially manage the billing operations of a law firm.

This may include invoicing, collecting payments, and running financial reports for review by firm leadership.

Printing of proformas and/or final bills for attorney's review

Researching and answering billing questions from attorneys, secretaries, and clients, as well as inputting and updating invoices in the accounting system, and uploading to the electronic billing system."

Ensuring that monthly invoices are completed on time

Communicating and interacting with attorneys, secretaries, other administrative staff members, and firm clients

Reviewing bills and supporting documentation for accuracy and completeness

Researching client billing questions and concerns

Responding to billing disputes

Pain Points

Time consuming Billing system

Errors in invoice

Description of task missing

Tracking of time and justification of work to client is difficult

Multiple times To-fro process

Missing deadlines

Forget to raise timely invoice

Don't get payment on time

Losing Track of Transactions

“Day in the Life of”



A Day in the Life of Laura (Paralegal)

An immigration paralegal (a.k.a immigration legal assistant) works on immigration law matters under the supervision of licensed attorneys. As they are not licensed, immigration paralegals don't practise law but help in many aspects of immigration law matters, including those involving citizenship and business immigration issues, political asylum, and the securing of travel, work and student visas. They work for the immigration lawyers within the bounds of legal and ethical rules.

Data Collection & Handling	Scheduling & Follow-up	Maintaining
50%	30%	20%

ACTIVITIES	Checking To-Dos	Fixing Appointments	Collecting Data	Handling Data	Handling Files/Packages	Following up	Administering
	Checks voice messages and emails from clients/ internal departments/ govt agency/ CMS and creates action items	Checks appointments/ reminders and creates schedules for the attorney	Collects information from the client using various tools (Email, INSZoom, etc.)	Prepares data in a specific format. Iterates and gets them reviewed by client & attorney. Sends data for client signature	Create and submit the package/ draft for the cases and Government agency. Check FedEx mails	eRequest government for long due items. Send regular updates and RFE updates to client/employer	Performing all maintenance related tasks for the firm
EXPERIENCES							
Exploring	Filters items based on urgency	Understands how the day unfolds				Filters pending items based on timelines	
Capturing	Creates To-Dos	Creates schedules		Updates details on CMS, draft forms		Create RFE/approval letter for the client	Translating documents written in foreign language
Analysing							
Iterating			Follows up with client for pending information	Works on corrections suggested by attorney		Get the letter reviewed by attorney	
Experimenting							
Maintaining		Firm Calendar					Maintaining login credentials for various government portal such as DOL, DOS, etc.
Manual/Offline					Snail-mail the package	Send instructions how to file DS 160 and how to schedule visa appointment	Organizing and maintaining physical files
PRIORITIES	1. Client issues 2. Internal email on client cases 3. New Client Info 4. ToDos from govt agency 5. CMS alerts	1. Appointments 2. Court dates 3. Interview dates 4. Consultations				1. Pending longer than the processing time 2. Within 48 hours, update the client/employer on RFE	

Current Product Structure

Corp > Adv Settings



Corp > Corp Users



Setup > Settings



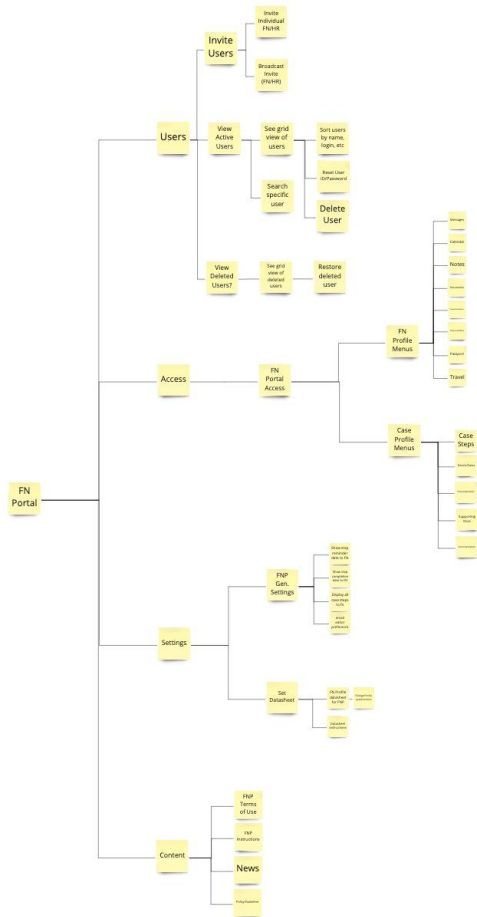
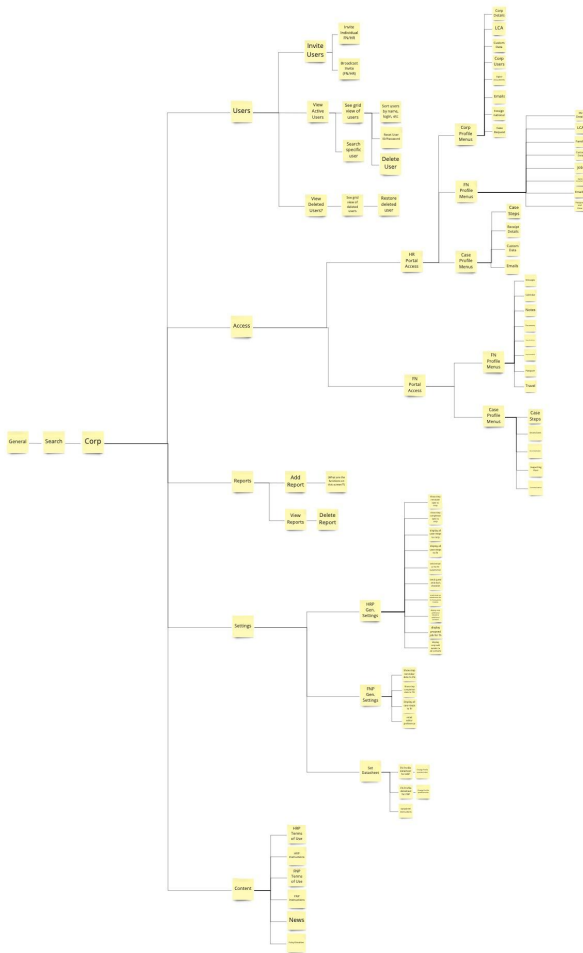
FN > Security/Tools



Setup > Settings > Org Tools > Cust. for FN



Current Product IA



Existing UI

Enterprise

You are here : Billing > Invoices and payments > Invoices

List Of Invoices

[Add New Invoice](#)

Filter By Status: All Search By: Invoice Number Containing Sort By: Invoice Number [Find](#) [Show All](#)

Inv No.	Inv Amount	Payer Name	Client Name	Date	Due Date	Due Amount	Payment Status	Void Status
1 Prefix158	\$ 1,130.00	bajaj singh	bajaj singh	Oct 27 2020	Nov 11 2020	\$ 1,130.00	Unpaid/Open	No
2 Prefix157	\$ 0.00			Oct 19 2020	Nov 18 2020	\$ 0.00	Unpaid/Open	No
3 Prefix156	\$ 245.00	Banu fge B	Banu fge B	Oct 12 2020	Oct 13 2020	\$ 245.00	Unpaid/Open	No
4 Prefix155	\$ 1,330.00	Riya sharma	Riya sharma	Oct 8 2020	Oct 9 2020	\$ 1,330.00	Unpaid/Open	No
5 Prefix154	\$ 0.00			Oct 8 2020	Dec 7 2020	\$ 0.00	Unpaid/Open	No
6 Prefix153	\$ 410.00	VA Jim Patel	VA Jim Patel	Sep 15 2020	Oct 30 2020	\$ 290.00	Partially Paid	No
7 Prefix152	\$ 3,300.00	Sebastain Vettel	Sebastain Vettel	Sep 11 2020	Nov 24 2020	\$ 500.00	Unpaid/Open	No
8 Prefix151	\$ 0.00	Dharan A	Dharan A	Sep 3 2020	Oct 3 2020	\$ 0.00	Unpaid/Open	No
9 Prefix150	\$ 6,260.00	Mark Boucher	Mark Boucher	Aug 24 2020	Sep 23 2020	\$ 6,260.00	Unpaid/Open	No
10 Prefix149	\$ 3,750.00	Arya	krishnaKav	Aug 17 2020	Oct 1 2020	\$ 3,750.00	Unpaid/Open	No

[Support](#)

Existing UI

INSZoom.com - Search For Payer
global.inszoom.com/CorpAttorney/actg_payee_search.aspx?enc=5du3avD1QLRgN7AE...

Search For Payer

[Cancel](#)

Search For Corporation

Corporation Name Contains [Go](#)

Search For Employee/Client

First Name
And/OR
Last Name Contains [Go](#)

Search For Prospective Employee/Client

First Name
And/OR
Last Name Contains [Go](#)

Search For Prospective Corporation

Corporation Name Contains [Go](#)

[Cancel](#)

Enterprise

My ZoomBoard
Recent Records
To-Do
Calendar
Search
Prospects
Corporation
Client
Case
Reports
Billing
Setup
Collapse

Billing

Search Invoice
Billing Overview
Show Invoice List

1. Invoice

Invoice Snapshot
Invoice Details
Fee Items
List All Invoices
Firm Address
Currency Setting
Link Logo
Unlink Logo
Link Print Template

2. Payment Info

Payment Plan
Update Payment Info
Accept Credit Card
Payment History
List All Payments

3. Communication

Emails
Notes

4. Others

Print Receipt
Print Label
Customize print preview

You are here: Billing > Invoices > Invoice Details

Invoice#: [Prefix159](#) Payer: [@Apple, Inc.](#)

Invoice Details

Invoice [Please Select](#) [Go To Invoice List](#)

To	@Apple, Inc.		Invoice #	Prefix159
Attn	Poonam Biradar		Invoice Date	Nov 17 2020
Country	India		Invoice Amount	\$ 0.00
Apt./Ste./Flr./Door No.			Received Amount	\$ 0.00
Street	442 MK Gandhi Road		Balance Due	\$ 0.00
City/Town	Bengaluru	County	Credit/Escrow Amount	\$ 0.00
State/Province		Zip/Postal Code	Next Amount Due	
Email			Next Due Date	Jan 16 2021
Telephone #	912 , 913		Pay now	\$ 0.00
Mobile Number	914		Void	No
Fax				

Notes

[Add Case For this Invoice](#) [Add Items For this Invoice](#)

Invoice Item Details

ID	Description	Rate	Quantity	Total
No Fee Items found.				

[Support](#)

Existing UI

INSZoom.com - Add fees for invoice

global.inszoom.com/CorpAttorney/actg_inv_add_fee_items.aspx?QInvNo=405&QPayeeId=PBYY01553&QParentPage=OverView

Add Items To Invoice# Prefix159 (Payer: @Apple, Inc.)

Check All Clear All Save Cancel

Fee Template: H-1b
Apply Fee Template ☒
Tax

Fee Template Items

Group	Description	Class	Rate(\$)	Quantity
<input checked="" type="checkbox"/> General Fee Items	Admin Fees	Expense	100.00	1
<input checked="" type="checkbox"/> General Fee Items	Consultation Fee	Income	20.00	1
<input checked="" type="checkbox"/> General Fee Items	Filing fee	Expense	1250.00	1
<input checked="" type="checkbox"/> General Fee Items	Lawyer Fee	Expense	100.00	10
<input checked="" type="checkbox"/> General Fee Items	Paper work	Income	150.00	1

Check All Clear All Save Cancel

INSZOOM.com - Invoice payment plan details

global.inszoom.com/CorpAttorney/actg_inv_payment_plan_details.aspx?enc=r09yoPHuUTuDqSA...

Invoice Payment Plan Details

Accept Payment Plan Recalculate Payment Plan

Current Payment Plan Due As Of Today: \$ 0.00

	Due Date mm/dd/yyyy	Due Amount	Total due after payment on due date
1	11/1/2020 mm/dd/yyyy	\$ 500.00	\$ 830.00
2	11/2/2020 mm/dd/yyyy	\$ 500.00	\$ 330.00
3	11/3/2020 mm/dd/yyyy	\$ 330.00	\$ 0.00

Accept Payment Plan Recalculate Payment Plan

Existing UI

Billing - INSZoom.com

global.inszoom.com/ZoomCMS/Billing/Index#/Billing/AcceptCardPayment?q=53616c7465645f5f4fedede7408ace1fa7209ed28f372694aabb6bbfd55222da90484a9...

Invoice Payment

Reference

Riya sharma

Payment Details

Invoice #:

Prefix155

Amount Due:

\$1330

☒ Pay \$1330

☐ Enter other amount

Total: **\$1330**

Billing Information

Address1

Address2

CHENNAI

Tamil nadu

Zip/Postal Code

United States of America

Phone

aamir.saad@inszoom.com

Card Information

Riya sharma

Card Number

CVV

mm / yyyy

We Accept :

VISA

MasterCard

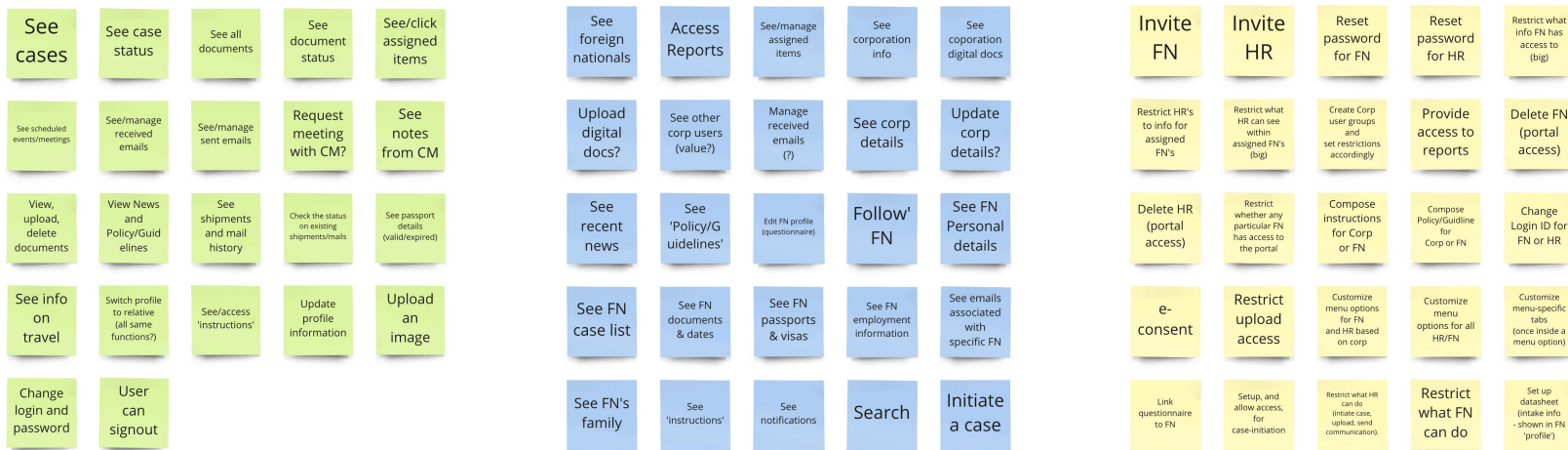
AMERICAN EXPRESS

DISCOVER

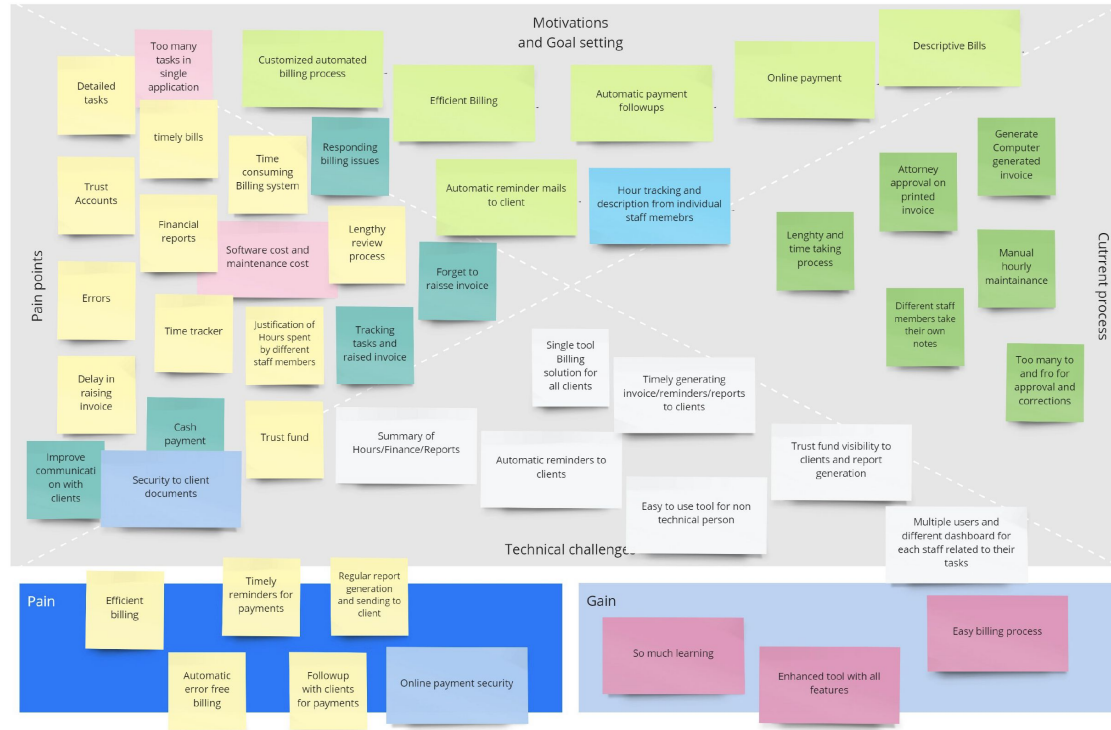
Cancel

Pay

Feature Set - Persona & Usage Driven



Empathy Mapping (Paralegal)



Brainstorming

Time & Expenses/tracking hours

Real time capturing Time & Expenses
Roll-wise access to the system
Matter and description details/options
Linking all billable items
Mobility

Invoice Generation & Delivery

Generate Bills as needed on-time
Print/Email/share



INSZOOM
Billing Module

Pre-Bill Review

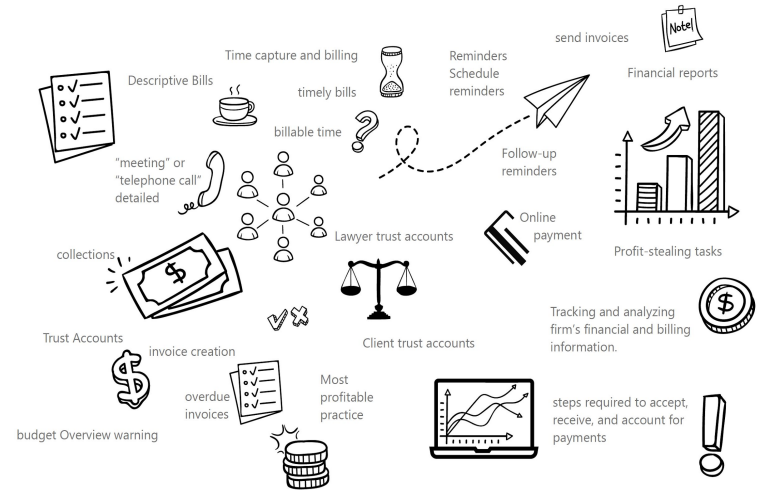
Reviewing/approve
Edit to entries
Generate Final Bill

Receive Payment






online easy payment
Retainer/Credit notes
Credit card

Collection Tools & Reports

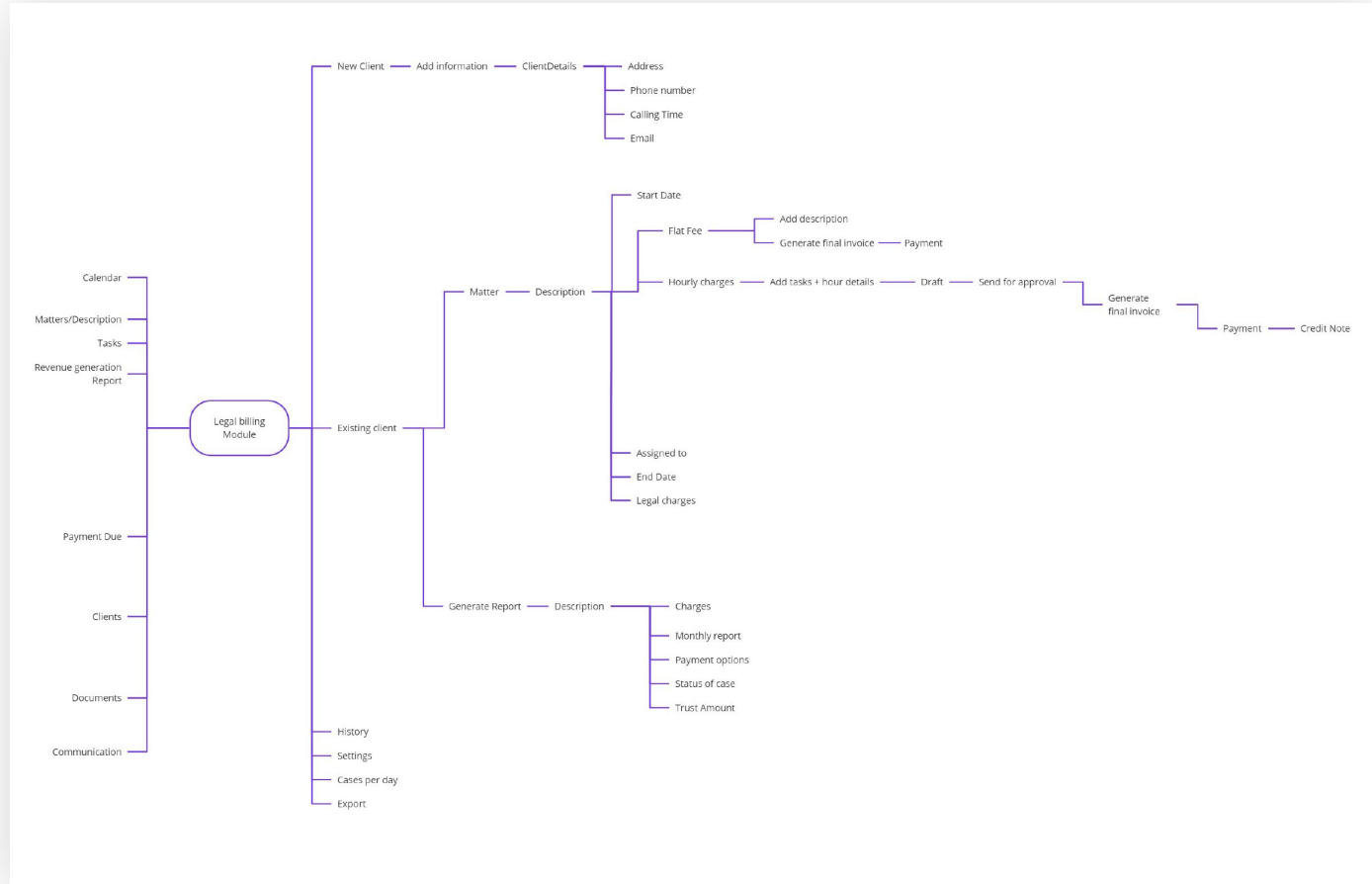
Reporting on expenses/Trust amount
Notify past due balances
Payment reminders



Competitor Analysis

Competitive Analysis	 LAWPAY AN AFFINIPAY SOLUTION	 TIME SOLV	 CLIO	 mycase by appfolio	 PRACTICEPANTHER
Time and Expense Tracking	✓	✓	✓	✓	✓
Automates invoice creation	✓	✓	✓	✓	✓
Calendar Management	✓	✓	✓	✓	
Hourly and Fixed-Fee Billing	✓	✓	✓		✓
Full account receivable	✓	✓	✓	✓	✓
Trust Accounting	✓	✓			✓
Leads Invoicing	✓		✓	✓	✓
Accept Credit/Debit card	✓	✓	✓		
Report		✓		✓	
Work	✓	✓	✓		✓
Data to excel		✓		✓	
Email support	✓	✓	✓	✓	✓
Customer Support	Offline	Online	Online	Online	Online
Platforms	Web-based/ iPhone app /Android app / Windows Phone app	Web-based/ iPhone app /Android app	Web-based/ iPhone app /Android app / Windows Phone app	Web-based/ iPhone app /Android app / Windows Phone app	Web-based/ iPhone app /Android app / Windows Phone app

User Flow



How Might We

Innovate on the major touch points of the user

In this task we will consider the map as our bible, then we will identify the right challenges to be addressed with the right solution. I formed HMW questions for each of these needs which acted as a guide in the defining phase to solve design challenges. For each of the identified need and narrowed down on features that will have the max. value with the minimum effort to implement.

HMW	Reduce the repetitive tasks associated with tracking and entering billable time
	<div>Automatically track the amount of billable work of each attorney using a smart phone, watch or computer</div> <div>Have a manager to keep track on the billable time of other attorneys working for each project</div> <div>Suggestion of common billable time for each of the attorneys for each projects</div> <div>Use pen & paper to track time. At the end of the week/month summarise each task and time took for it</div> <div>We need an extension for chrome to easily switch on the different tasks performing at the same time</div> <div>There should be a daily limit for the attorney per day to complete and they should be notified about it</div>

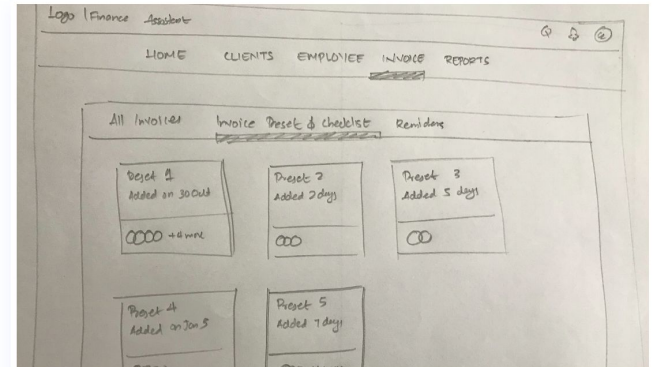
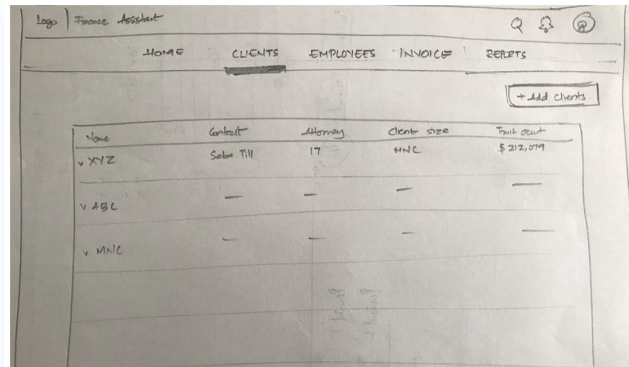
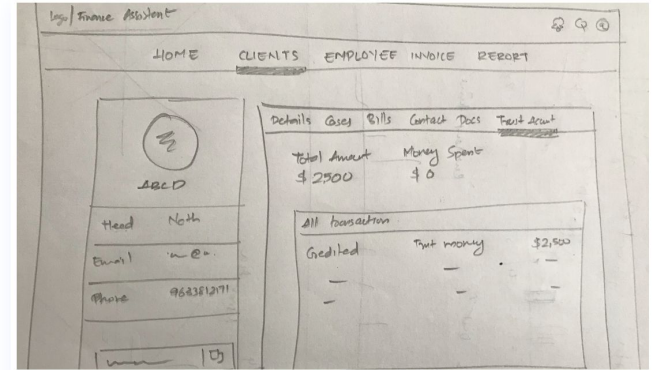
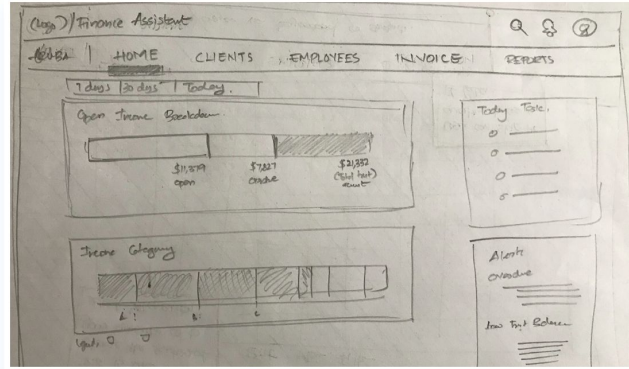
HMW	Simplify the invoice creation process
	<div>We can have excel sheet of time sheet upload feature. This will cross check the rate/hr of the attorney's and automate the invoice</div> <div>System will suggest the common task and work the attorney's tool for it while adding the time</div> <div>LEDES 1998B filling feature?</div>

HMW	Make it easy to send invoice to clients
	<div>Reminder for the timely bills</div> <div>A list of important check Points for the different clients so that these Information should be mandatory in the invoice</div> <div>Create reminder to follow up when we are sending the invoice to a client</div>


HMW	Standardise the steps required to accept, receive and account for payments
	<div>Effective checking on the paid & pending invoices</div> <div>Effective communication via mail or phone on any incidents or extra efforts</div> <div>Legal billing checklist</div>

HMW	We reduce the conflict with the client if extra charges/efforts is added in the invoice
	<div>Set a strategy or understand the expectation from the client</div> <div>Give discounts to the client if needed</div> <div>Show the client the detailed report of the billing. Clients want the service not the bills</div> <div>Provide client with bonuses, events, luncheons, workshops and other things that creates a value</div> <div>Set a communication interval which both side are okay with</div> <div>Set the number of follow ups until you raise a concern</div> <div>Enable a client portal in the platform so that they know the progress at any given point of time</div>

Wireframes




Visual Designs



HomeClientsEmployeeInvoicesReportsAccount

< Back to all Clients



Microsoft Inc
AX 16805

Account Manager

Nathaniel Poole

Primary Contact


Alice Becker

Type

Conglomerate

Edit the profile

https://app.ahiregro.save.c...



DetailsCasesBilling RatesContactsDocumentsInvoicesTrust Account

Basic Details

Account Manager

Nathaniel Poole

Edit

Email

Nathaniel@outlook.com

Edit

Primary Contact

Alice Becker

Edit

Phone

0874 - 5672931

Edit

Mobile

+91 7867236142

Edit

Fax

768458134

Edit

Billing Contacts

Billing Name

Nathaniel Poole

Edit

Address

#367, 2 block

Edit

City

HSR Layout

Edit

State

Karnataka

Edit

Country

India

Edit

Zip code

675839

Edit

Client Settings

Status

Active

Edit

Accounting Isolation

#367, 2 block

Edit

Client Type

Conglomerate

Edit

Currency Code

\$ American Dollar

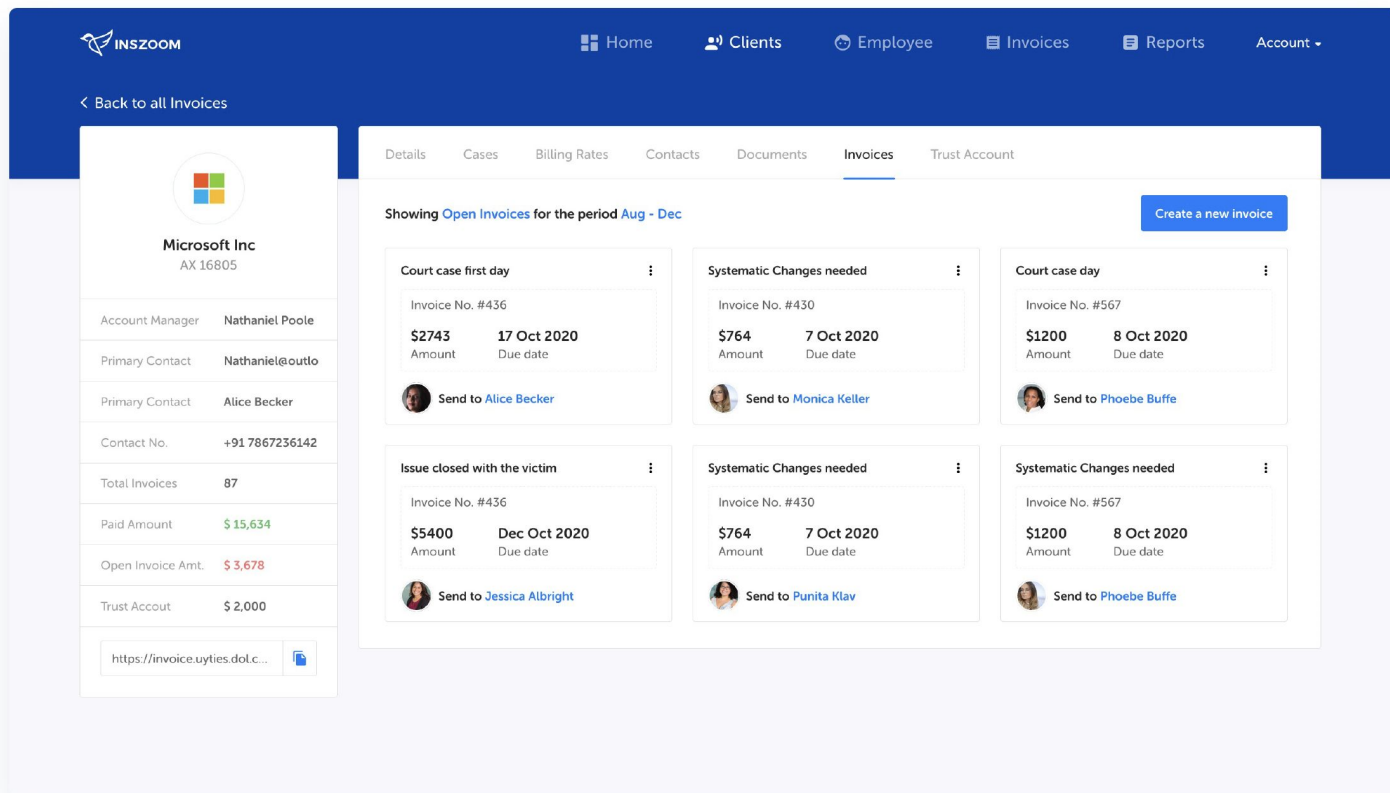
Edit

VAT Number

TY67183474O98

Edit

Visual Designs



Visual Designs

INSZOOM

HomeClientsEmployeeInvoicesReportsAccount

Invoices of all the clients

All InvoicesInvoice Presets & ChecklistReminders

Showing [Open Invoices](#) for the period

Court case first day

Invoice No. #436

\$274317 Oct 2020

AmountDue date

Send to Alice Becker

Issue closed with the victim

Invoice No. #436

\$5400Dec Oct 2020

AmountDue date

Send to Jessica Albright

Court case first day

Invoice No. #436

\$274317 Oct 2020

AmountDue date

Send to Alice Becker

Issue closed with the victim

Invoice No. #436

\$5400Dec Oct 2020

AmountDue date

Send to Jessica Albright

Court case first day

Invoice No. #436

\$274317 Oct 2020

AmountDue date

Send to Alice Becker

Create an invoice for the client [Hewlett Packard](#)

Hewlett Packard have some strict checkpoints for bill creation [check here](#)

Bill Details

Batch ID456721

Billing Date01 Aug 202031 Aug 2020

CasesCase on the merge

☐ Include all cases

Case on building

DescriptionDetails of the Invoice and if any new data is added should write here

Attornies to IncludeArjun Reddy

☐ Attach their time sheets

Abhash MathewPooja Krishna

Total Billed Hour129 hour 32 min

Total Billed Amount\$ 32,571

Extra Bills

Bills	Amount
Court appeal	\$ 200
Injection Notice	\$ 150

+ Add another bill

Total Extra Bill Amount\$ 350

Sub Total\$ 32,921

☐ Enable Discount

Other Details

Billing PersonNathaniel PooleNathaniel@outlook.com

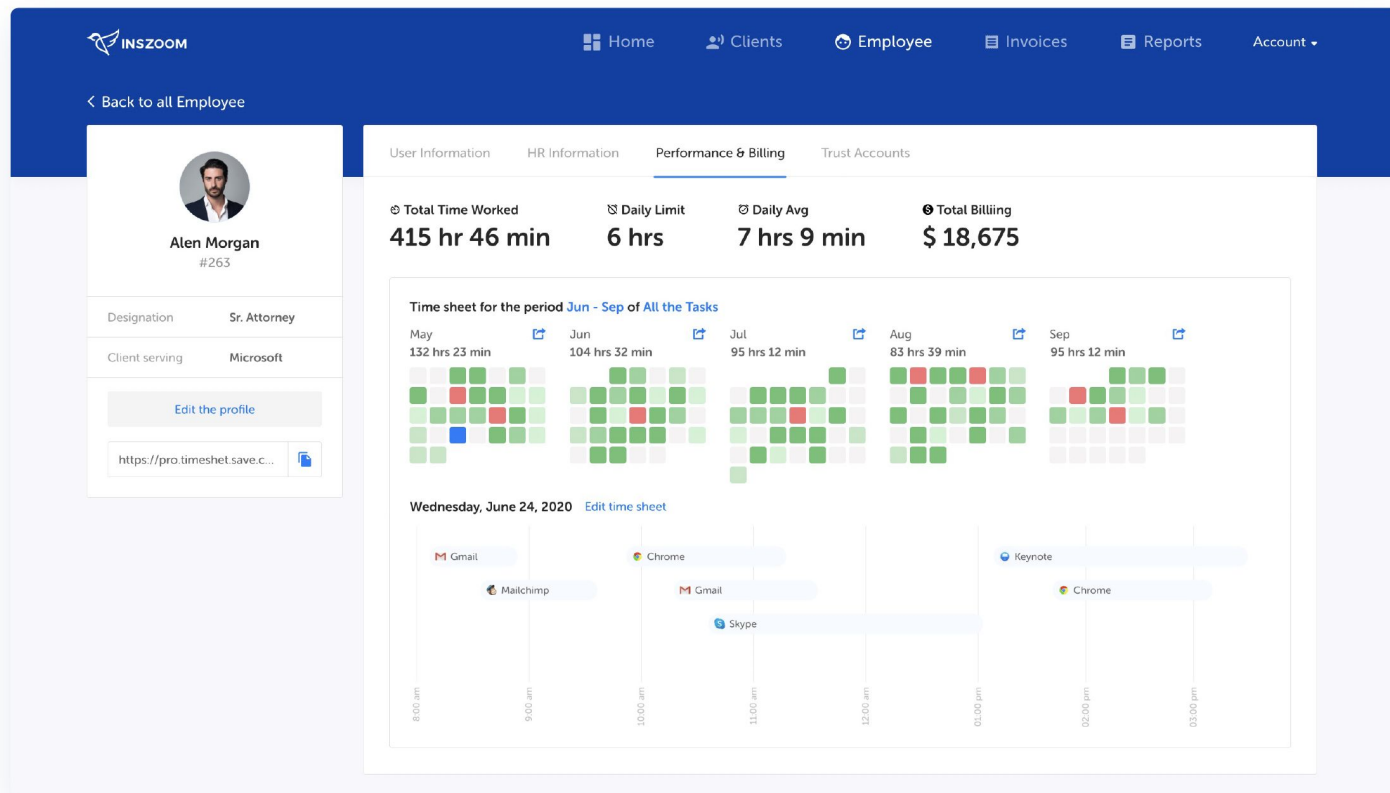
+ Add another contact

Payment Due On30 Sep 2020

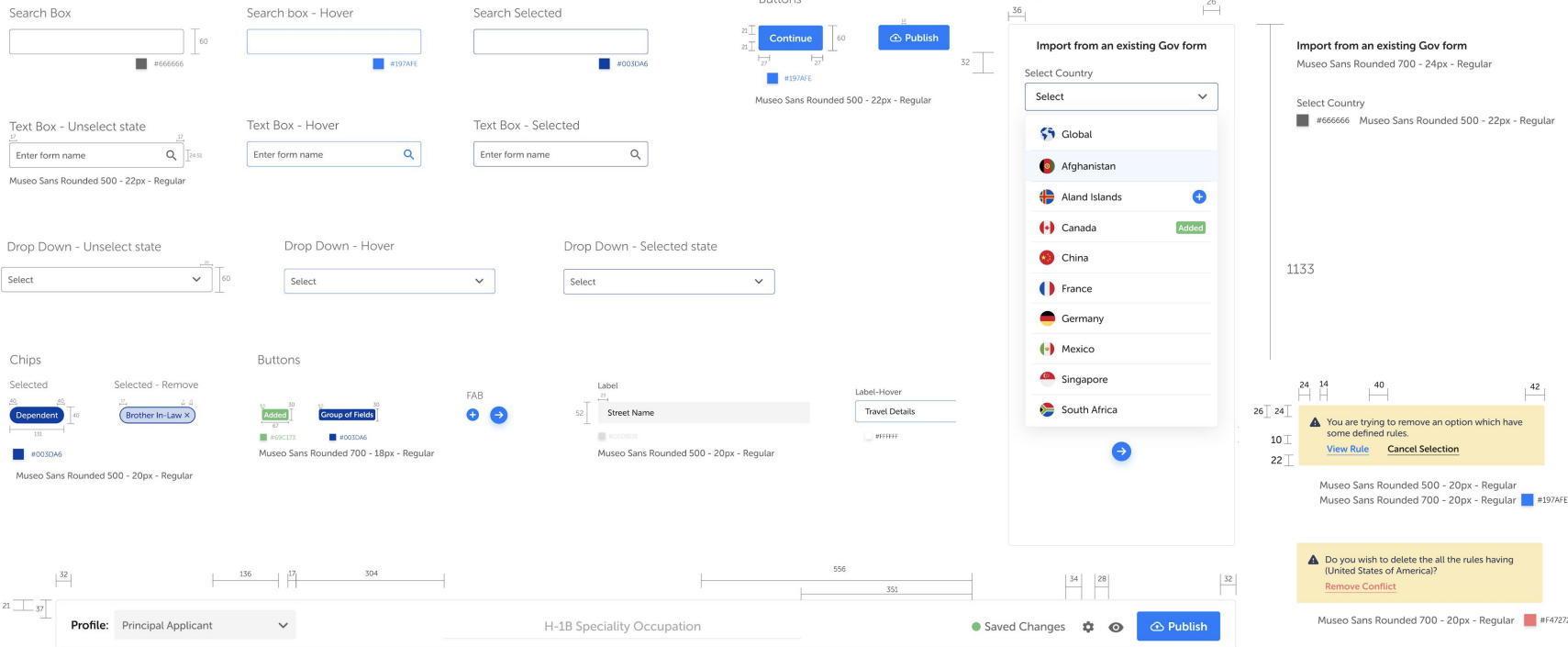
Bill RegularityEvery month end

CancelSend the Invoice

Visual Designs



Design System





Thank you