

Immigrant Law Group slashes billing management time by 70%

Immigrant Law Group is a group of human rights lawyers based out of Portland, Oregon, that defends the rights of immigrants and their families. They strive to make their services affordable to all potential clients by offering payment plans. Learn how the Invoiced platform slashes Immigrant Law Group's time spent managing payment plans by 70%.

Imagine yourself showing up to work each day to a mountain of paperwork and manual processes. Post-it notes litter your desk with important reminders. One lost note could cost your company hundreds or even thousands of dollars. Tools you purchased to streamline your workflow wreak havoc when they fail, turning the simplest task into an emergency.

Though it seems impossible, this scenario was a reality for Elizabeth Skokan, the Accounts Administrator for Immigrant Law Group of Portland, Oregon. Immigrant Law Group is a public-interest focused, private law firm that provides legal representation in immigration-related matters to immigrants and their families. They assist in family reunification, protecting persons fleeing persecution, and guaranteeing access to benefits and rights under immigration laws and the Constitution of the United States.

As the Accounts Administrator, Elizabeth is responsible for creating invoices, monitoring payments, answering billing questions, managing payment plans and identifying outstanding balances. Payment plan management is a large part of her role, as most clients use payment plans to offset the high cost of the firm's services. In addition to these responsibilities, Elizabeth has the added challenge of collecting payments from clients with varying language abilities. Some clients speak neither English or Spanish - only variations of Mayan languages.

A system fraught with delays and errors

Upon joining the firm, Elizabeth inherited two tools to manage her workload - accounting software for the bulk of her accounting tasks and a separate billing system for payment plans. The firm set up synchronization between the two systems for payment reconciliation.

But the synchronization failed 3-4 times a year, and the accounting software's customer service team was unresponsive to repeated calls for help. "If you are talking one to two accounts, that's no big deal," said Elizabeth, "but with 50 to 100 clients, it becomes a real problem."

Delays in synchronization caused errors on account statements, prompting repeated calls from clients. To reduce confusion, Elizabeth printed out verified statements and mailed them several weeks late. "We'd rather hold off on sending statements than have clients receive a statement that was incorrect," she said.

Legal assistants frequently needed to know the client's account balance. Without access to accurate payment details, they had to ask the Accounting Manager for the correct account balance - which could take several days to get a response.

The firm's 3 attorneys needed a daily report showing payments received per attorney per day. This report was dependent on an attorney at the firm "closing out the day" in the accounting program. With busy schedules and only 3 attorneys on staff, this step could slip through the cracks and delay the report by up to 5 days.

Limitations in the billing system's payment plan functionality impacted Elizabeth's ability to manage plans. She could enter payment plans, but she couldn't modify them if terms changed. She couldn't track payments against the total amount due. And in order to manage the early payment discounts that Immigrant Law Group offers, she had an elaborate system of notes, reminders, and alarms.

Invoiced: the simple solution for complex billing processes

In August 2016, Elizabeth and the Immigrant Law Group staff began exploring Invoiced, an online invoicing system designed to help businesses get paid. They chose Invoiced because of the company's superior customer service.

"Our practical goal is to have a constant revenue stream that allows us to keep growing. We wanted to find a system that is customer friendly. We really like the fact that Invoiced is always available - on the phone, email, and also via documentation. It's a big deal for us to communicate our needs and have an answer."

Elizabeth Skokan, Accounts Administrator at Immigrant Law Group

Immigrant Law Group loaded their customer data into Invoiced and began accepting on-site payments, just to get a feel for how it worked. In the process they realized that Invoiced lacked their mission critical functionality: payment plans. They explained the need for payment plans to Invoiced co-founders Jared King and Parag Patel, who then decided to build payment plans into the Invoiced platform.

"Our mission is to empower businesses of all sizes with the best tools to get paid," said Jared. "Keeping track of and collecting installment payments is a time-consuming task that is ripe for automation. This problem is an ideal example of the complex billing processes we can solve for merchants."

Increasing confidence and decreasing time spent

Immigrant Law Group fully deployed Invoiced in October 2016 when payment plans launched. Elizabeth uses it for payment processing and recording, and twelve others use it in read-only format. She's now able to bill clients, modify payment plans, and track payments against specific payment plans in Invoiced. She can enter discounts on payment plans and set expiration dates for each discount. Each day she runs a report that shows payments collected for each attorney. Any staff member with read-only access can log in and view a customer's current account balance.

"Now we can go into Invoiced and see what is happening with each account," said Elizabeth. "The result we have is incredible."

Immigrant Law Group has seen a major time savings since the launch of Invoiced. Elizabeth has reduced her time spent tracking payment plans by 70%. Customers can find their balance online with a couple of clicks. Staff members can access customer payment data immediately. And Elizabeth can run her daily payment report with zero manual effort.

The firm has also gained peace of mind. Immigrant Law Group staff can now log into Invoiced and know that they have the most up-to-date payment information. Gone are the days of customer calls due to incorrect statements and manual processes to keep track of payments and discounts. And no more lost revenue due to incorrect statements. Now that payment plans are on auto-pilot, they can focus their attempts on collections.

"Invoiced has made sure their solutions can be applied to all our business needs. In every way, they have helped improve the quality of our business - regarding payments and beyond."

Elizabeth Skokan, Accounts Administrator at Immigrant Law Group