

# Munger, Tolles & Olson Empowers the Firm With Team-Level Financial Dashboards

## The Challenges

Munger, Tolles & Olsen needed next-level financial dashboards that gave teams daily financial targets, opportunities and risks, so they could make data-driven decisions with financial implications in mind.

Carlos Rodriguez, Financial Systems Manager at Munger, Tolles & Olson, explains, "Fancy data and graphs are no longer helpful – simplicity and urgency are. Lots of things are important but only a very few things are urgent. To be able to make that judgment call you need to know where to focus."

For example, when billing attorneys needed to know,

Are bills being sent out late? Are my clients paying on time?

Carlos says, "This knowledge is extremely powerful for attorneys. We wanted to empower them to effortlessly see which clients and matter require attention."

Whereas the marketing team needed to draw attention to things like, Most of our work comes from this financial institution but it's all in litigation – why aren't we cross-selling? And the legal project services team needed to know, How efficiently are the teams being used this month?

## The Solution

BI consultants, Pinnacle developed simple dashboards that ran on a measurably faster interface than the firm's previous

system, minimizing time and effort for teams and delivering relevant financial insights from Thomson Reuters 3E. Pinnacle and the

## Results



More Time for Customization



Higher Quality Proposals



Increased Win Rate



firm, worked closely to capture the questions each team wanted to answer monthly, quarterly or annually, ensuring that the final solution actively served them.

Carlos adds, "The dashboards have grown to become a critical business tool. Interestingly, and unexpected even for us, they have also

proven to be highly powerful in getting new hires up to speed, even at the management level, because they can access and analyze historical data more effortlessly."

## Reaching the Heights of Success

Carlos says, "The best thing I can compare the Pinnacle BI consultants to is world-class composers. We told them what we wanted the final piece to sound like and they just made it happen. They understood that fundamentally we did not want to get arms deep in the technical details, but rather needed answers to business problems and questions quickly."

The Pinnacle team said, "It's been a pleasure to work with Carlos and the team on delivering meaningful and insightful dashboards."

It's impressive to see when firms recognize the value of financial data for different departments. What especially made a difference for us is that Munger, Tolles & Olson were open to new recommendations which enabled us to bring in our previous experience to build something useful and powerful, which we knew would work."



Learn more about how your firm can elevate its Business Intelligence!

[www.pinnacle-oa.com](http://www.pinnacle-oa.com) | [info@pinnacle-oa.com](mailto:info@pinnacle-oa.com)