

Tyson & Mendes: Improves Operations And Business Practices with Tableau

Tyson & Mendes, an AV-rated litigation firm, employs more than 200 attorneys across 16 offices in the United States. The law firm's mission is to achieve justice for all through innovation, collaboration and outstanding service and prides itself on doing things differently and more effectively than other defense firms. The firm uses advanced technologies and has developed specialized defense methods to overcome punitive damage awards and tracks the amount of indemnity helping their clients year over year. With their focus on leveraging advanced technologies to enhance client experience, Tyson & Mendes needed to decipher specific reporting efforts and began using Tableau Software with three licenses.



Denise Tyson, the Head of Finance & Operations at Tyson & Mendes, oversees all back office initiatives focused on finance, accounting, IT and real estate. Denise, becoming more engaged in the firm's efforts with Tableau and learning more about its functionality and potential of the software, started to sketch out initial thoughts on how the firm's back office operations may utilize the powerful analytics tool. Denise engaged Cherry Bekaert's Digital Advisory team with a vision of the data she needed to get to that would help guide the firm forward.

"Initially, we focused on the operational financial aspects like counting how many cases we have, how many clients we have, which then morphed into bigger thinking around operational and financial reporting and what data we really needed to leverage - like combining our previous excel-based tracked metrics with our most recent time-tracking data in ProLaw to create an executive dashboard," said Denise Tyson. By leveraging Tableau, the team was able to pull data from multiple resources for report automation, eliminating multiple spreadsheets, manual hours and discrepancies.

As the financial dashboards gained traction throughout the firm, Denise began working on further enabling Tableau throughout the firm's department leaders from administration, client relations, legal and marketing.

Expanding Upon Data-Driven Insights

"That's the excellence behind using a technology like Tableau and combining it with the expertise of Cherry Bekaert. There is so much potential and opportunity with our data and linking our systems and reports for automation. Once you see and understand how reports can be utilized, it just creates more opportunities and potential across departments," stated Denise Tyson.

The Cherry Bekaert team worked with Tyson & Mendes' marketing to pull data from various sources like HubSpot, Bamboo and Google Analytics to build high-performing dashboards to monitor website analytics activity and to capitalize on trends. Knowing who was visiting the site and what they were navigating to created deeper insights for the marketing team on how to draw in leads and connect with their audience.

Tyson & Mendes' founders quickly began to take note of Tableau's power, requesting a preview into executive-level metrics such as a revenue analysis, client stats analysis, cash position, headcount at the end of the month, etc. The executive dashboards, delivered on a subscription basis daily via email, provides real-time insight into the financial health and long-term sustainability of the business enabling leadership to easily pivot business priorities where needed.

As the firm continued to get more rooted in Tableau with data at management's fingertips, the focus turned towards a critical and often challenging component for law firms - time reporting and billing. With multiple locations, the firm organizes its attorneys and staff members in teams. Averaging around 50 teams, each team is managed by a team leader who is responsible for tracking resources and time. Cherry Bekaert built a dashboard tool linked to the firm's time tracking solution, enabling each team leader with a daily snapshot into their team's time reporting. Rather than manually tracking input, team leads are now able to get a quick snapshot of time reporting and gaps, enabling quick resolution and resulting in greater accuracy in reporting, driving accountability across every level of the firm.

As of late, the team is exploring capacity reporting which evaluates case load across teams drilling deep into the case location, case type and the expertise needed. By using both historical and current data, the team is building dashboards that allow team leads to observe caseloads and align assignment(s) with the proper expertise and resources.

Looking to a Data-Driven Future

Tableau continues to become a reporting staple and essential business solution utilized throughout Tyson & Mendes, growing from three licensed seats to more than 60 licensed seats in a span of over two years with a very successful adoption across the firm's departments.

"The team at Cherry Bekaert has been immensely helpful. I can provide them with a vision of the data I want to see, and they deliver on point, infusing the technical expertise to bring our vision to life. They are extremely responsive partners and essentially an extension of our Data Analysis team. I definitely rely on them to keep the wheels moving so that Tableau continues to work because we now have so many people using it and so much opportunity ahead of us."

- Denise Tyson

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