

**PROFESSIONAL SERVICES AUTOMATION SOFTWARE**

**KNOWLEDGE INTEGRATION**

**DATA SYNCHRONIZATION AND MOBILITY**

**INFORMATION SECURITY**

**COMPETITIVE ADVANTAGE**

**ERP SOLUTIONS**  
**for THE LAW FIRM**



## Product Strategy

**Dexco** provides its clients non-modularized, industry-specific solutions configured in accordance with individualized business models in support of the firm's critical success factors, business culture and competitive advantages. **Acumin** facilitates the operational and performance management requirements of firms by effectively handling diverse information sources across all business disciplines. Leveraging a "best-in-class" engine; the **Acumin** product line optimizes workflows and utilizes knowledge resulting in a well-rounded and effective platform on which to base timely operational, tactical and strategic decisions.

Regardless of size or business purpose, our clients benefit from a robust engine and relevant scalable tools, configured in accordance with firm-specific requirements and budgetary constraints. Through a systematic collaborative approach, **Dexco** offers a tailored "turn-key" Professional Services Automation solution optimizing our clients' return on investment.

### Acumin

A solution designed for the medium to large law firm looking to leverage its resources to optimize competitive advantages with a cost effective and efficient implementation and conversion model. **Acumin** streamlines workflow and reduces administrative inefficiencies by effectively eliminating redundant functions. Enterprise specific by design, the breadth and depth of **Acumin** allows for the deployment of innovative professional services automation (PSA) platforms adaptable to the firm's strategic vision, business culture and clients' needs.

### Acumin.e

Realize immediate time and cost efficiencies by leveraging the power of **Acumin's** elected elements. Our clients implement the "right" solution, optimizing depth and breadth of product in accordance with their strategic business objectives. Elect to enable relevant options for today and plan for additional ones on an as-need-basis. Powerful, feature rich and scalable, **Acumin.e** provides progressive organizations a choice that includes all of the benefits of **Acumin** without a need to compromise.

### Acumin<sup>4</sup>BUSINESS

**4Business Acumin** is a best-in-class integrated Business Intelligence (BI) solution, providing legal firms with a trusted foundation for decision making and performance optimization. Our **4Business Acumin** analytics are tailored to facilitate monitoring and feedback on the critical metrics adopted by your firm.

### Acumin.sme

Smart, mobile and efficient for the smaller agile firm: The power of **Acumin** is pre-configured to support the non-accounting user through operational accounting processes and streamlined with "best-practice" personal production work-models. Our clients remain focused on the delivery of quality legal services while minimizing the impact on administrative and operating costs, IT infrastructure and human resources.

Knowledge is power. With rapidly changing global markets and the need for "immediate" information, professional organizations are routinely evaluated on their current agility and intellectual capital.

An **Acumin** solution provides a robust knowledge integration and management platform for improved client service models, supported by effective workflows and an efficient administrative framework resulting in unparalleled competitive advantages.

**Knowledge is power.**

ERP SOLUTIONS FOR THE LAW FIRM

# Acumin



ERP SOLUTIONS FOR THE LAW FIRM

## Acumin is Knowledge Integration

With more than 35 years of legal market experience, Dexco's premium solution is a sophisticated yet easy to use Professional Services Automation system which operates on a robust MS-SQL® platform with optimal performance results.

**Acumin** delivers comprehensive tools relevant to professional service environments leveraging current and future technology for optimum return on investment. From developing an understanding of the organization's critical sources of business, to providing effective client and matter management tools, enabling the execution of potential legal and /or business conflicts assessments, invoking effective practice management models, applying efficient time tracking and calendaring options including MS-Office® and hand-held device integration, optimizing e-banking productivity opportunities, improving invoicing and collection requirements for effective cash flow and client relationship management, implementing workflows for improved operations at every organizational level, enabling useful human resources and marketing event management tools, to providing proficient and cost-effective financial accounting and reporting models; the application offers medium and large organizations a powerful platform on which to build an integrated knowledge system, taking full advantage of emerging technologies without compromise.

## Acumin is Practice Development

**Acumin** turns data sources into information resources simplifying the planning and implementation process of strategic marketing initiatives and business development strategies resulting in timely and effective practice development. Authorized parties can easily access business analytics models for effective and timely resource management, relevant strategic and tactical planning opportunities including multi-level budgeting, knowledge of relevant industries on which the firm operates, effective management of markets and the referral base, well-organized event management, comprehensive and efficient client reviews, opportune client relationship management, useful member workload assessments and the development of improved client service models.

**Acumin's** business development tools provide professional environments with well designed frameworks for the implementation of multi-tiered marketing plans that provide controlled and consistent messaging to well-defined targeted audiences. As part of a total professional services automation solution, **Acumin** leverages the firms' information and matter experience for a comprehensive and successful approach to business development and marketing.

## Acumin is Data Synchronization and Mobility

**Acumin** works in tandem with MS-Office® as well as other ODBC based products in order to maximize personal productivity by taking advantage of communication channels such as laptops, handheld PCs, PDAs, messaging devices and smartphones. Users will create and execute MS-Word® merges for quick and effective creation of documents leveraging the firm's intellectual property, opt to export results into MS-Excel® and/or interactive dashboards for additional analysis, capture time spent from MS-Office® products and/or hand held devices for increased recovery of time spent on a client file, make appointments from a range of technology channels for effective time management and invoke interactive workload management models for continued personal mobilization and motivation.

Mobile ready, **Acumin** facilitates anytime - anywhere data entry and information retrieval, leveraging continued growth in applicable software technologies and electronic devices for application across all business disciplines. With a platform ready to take full advantage of not-yet commercialized personal productivity and communication tools, **Acumin** continues to optimize the individual's potential through the implementation of relevant functionality in support of new technology.

## Acumin is Multi-Office Professional Services Automation

**Acumin** is a business process platform that offers powerful operational tools for medium to large professional services firms across all relevant business disciplines. Scalable and adaptable in response to global business growth and dynamic requirements, **Acumin's** embedded workflow streamlines the business processes of legal organizations across multiple offices and financial entities; enabling users to focus on their core competencies and providing the firm with the visibility it needs to overcome office specific day-to-day business challenges. Our clients implement unique business process models in support of the firm's strategy, automating workflows in accordance with established policy, increasing visibility of business performance in relation to objectives and improving their positioning in an increasingly competitive market.

**Acumin** includes a comprehensive suite of capabilities delivered through a consistent user experience, enabling decision makers to easily track and manage activity on a multi-office and / or multi-entity global scale. Supporting most western languages and all currencies, **Acumin** is designed to accommodate the needs of global environments with complex international structures in accordance with local accounting, currency and tax requirements.

## KEY SYSTEM FEATURES AND TOOLS INCLUDE

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**Acumin** is a highly configurable efficient platform specifically designed for agile organizations focused on the delivery of effective quality client services. Designed to support medium to large environments through the various native business processes involved in daily operations, **Acumin** is a robust professional services automation solution, streamlined with "best practice" configurable implementation models for efficient office-wide deployment and cost-effective product adoption. This robust solution is further enhanced with valuable metrics, analytics and reporting tools for clear performance management.

### PRACTICE MANAGEMENT AND CAPTURING TIME:

**Acumin** provides an intuitive and efficient approach to data entry and resource management using standard MS-Windows® functionality to support comprehensive practice management and time entry models encouraging users to capture key information regardless of their workspace. Use personalized auto-text replace and MS-Word® spell checking options for more efficient data entry methodology. Use "To-Do" frameworks and avoid missed deadlines. Synchronize agendas and contacts to eliminate redundant data entry. Capture additional time records or trigger new tasks without the need for additional inputs. Employ the many tools designed to facilitate data management, enabling "Firm" focus on professional services rendered rather than of data administration requirements.

Improve the firm's ROI by providing clarity into matter status and profitability models regardless of profit center accounting requirements; effectively capturing time spent and disbursements incurred on the client's behalf, successfully managing allocated resources, regularly reusing intellectual property, increasing the utilization of professional teams and improving access to detailed metrics for in-depth analysis. Small changes in productivity and workload levels lead to significant improvements to the bottom line.

### DATA SEARCH AND CONFLICT OF INTEREST MANAGEMENT:

Prospects, contacts, employers, employees, referral sources, other parties, vendors or clients are entered only once, ensuring that if the same person is needed in more than one instance, the application tracks and accurately reports each relationship for clear identification of potential legal or business conflicts.

**Acumin** includes a powerful and feature rich search engine for quick and meaningful search results with drill down capability. Potential legal or business conflict results are stored on a cumulative basis for future referencing thus eliminating unnecessary printing and reducing physical storage requirements.

### MARKETING AND CONTACT RELATIONSHIP MANAGEMENT (CRM):

With **Acumin**, users will store and track information on relevant relationships for a comprehensive approach to person and entity management. Track contacts, vendors, referral sources and clients on the same database and implement "best practice" automated CRM processes. Use important dates and CRM notes concepts for an interactive client-centered approach and invoke effective operational tasks leveraging person and firm information for optimum results.

Our clients plan and manage individual, practice group, office and firm-wide marketing tasks and events while successfully evaluating their cost-benefit and final outcome.

### REVENUE MANAGEMENT OPPORTUNITIES:

The application includes a myriad of features and options for the efficient and effective application of revenue management opportunities. Time entry and invoicing tools enable intuitive workflows and electronic approval processes for effective billing practices while providing decision-makers with exception based reporting on missed opportunities on the timely management of budgeted revenue flows. In addition offices and users have full control of the process in which they capture time and the manner in which the invoice details are presented to their clients for optimal docket-to-collection cycles and recovery of time and disbursements invested.

### BANKING AND TRUST MANAGEMENT:

Reduce costly inefficiencies by improving banking processes relevant to the timely collection of accounts receivable, the opportune payment of accounts payable, the sensible execution of on-demand third party client disbursements and the effective management of trust fund activity.

Whether the organization transacts using cheques, credit cards and /or e-banking software, save time and resources by eliminating redundant data entry and streamlining pertinent processes. **Acumin** includes highly automated workflow models in support of the firm's banking requirements, maximizing enhanced cash-flow opportunities for collections and payments. With **Acumin**, our clients take full advantage of trade credit and effectively manage timely receipts for optimum control of their liquid assets.

### MULTI-OFFICE PROFIT CENTER ACCOUNTING AND FINANCIAL MANAGEMENT:

**Acumin** includes automated general and trust accounting functionality for production level activity. With a "best-of" approach to chart of accounts design and financial statement models, accounting users will be able to easily navigate through the requirements of multi-office profit-center accounting, apply foreign currency models, use standard templates for recurring production based accounting operations and analyse financial transactions for timely and cost-effective decision making.

### HUMAN RESOURCE MANAGEMENT:

**Acumin** provides firms with effective human resource management tools leveraging production level information for timely reporting on workload in relation to the development of key talent. Track HR information, assess participation or use of health and wellness programs, invoke ongoing performance evaluation processes, implement absenteeism and vacation management tools, manage the recruiting process, oversee benefit program enrolment and automate a myriad of human resource management activities for timely decision making.

# Side-by-Side Feature Comparison

	Acumin	Acumin.e	Acumin.sme
<b>General Features</b>			
Non-modularized, single source multi-disciplinary application providing limitless data flow	✓	✓	✓
Firm definable processes and intuitive workflow tools	✓	✓	✓
Robust general ledger master account logic supported by a strong chart of accounts framework	✓	✓	✓
Enterprise definable configuration models	✓	✓	✓
User defined options and preferences, personalized tool bars and favourites	✓	✓	✓
Multi-Location: Use Acumin from multiple physical locations	✓	✓	✓
Multi-Office: Create multiple firms or profit centers	✓	opt	
Language: Application available in English, French, German and/or Spanish	✓	✓	✓
Multi-Lingual: Firm and user definable language	✓	opt	
Restricted Multi-Currency capability (billing in foreign currency)	✓	✓	✓
Full Multi-Currency capability	✓	opt	
Information Management and comprehensive reporting engine with extensive production and tactical level financial and management reporting options	✓	✓	✓
Comprehensive and flexible classification- and grouping- options for multiple reporting dimensions	✓	✓	
Reduced set of classification and grouping options, specifically tailored to needs of small law firms			✓
<b>Client Database and CRM</b>			
Comprehensive client and matter management tools	✓	✓	✓
Procedure based conflict and business interest management	✓	✓	✓
Client and Contact Relationship Management (CRM)	✓	opt	
<b>Time Entry and Billing</b>			
Thorough time and workload management options	✓	✓	✓
Extensive billing management tools and flexible bill formats	✓	✓	✓
Uniform task based in management invoicing and "best practice" billing models	✓	opt	
<b>Practice and Case Management</b>			
Intuitive practice management tools and activity journals	✓	opt	✓
Agenda, with group calendaring options, triggers and notifications	✓	opt	✓
Project management tools and models;	✓	opt	
Microsoft Office® synchronization (Outlook®, Word®, Excel®...)	✓	opt	✓
Policy based electronic approval models	✓	opt	
<b>General Ledger</b>			
Process based comprehensive accounting and trust management models	✓	✓	✓
Robust expense reporting and client disbursement tools	✓	✓	✓
General ledger budgeting and forecasting	✓	opt	
<b>Extended PSA Features</b>			
Embedded marketing related functionality	✓	opt	✓
Event management opportunities	✓	opt	
Enhanced expense reports and petty cash management tools	✓	opt	
Human Resources (HRIS) management tools	opt	opt	opt
Client and member web portals	opt	opt	opt
Handheld device connectivity (Blackberry®, smartphone and iPhone®)	opt	opt	opt
Business Intelligence (4Business Acumin)	opt	opt	opt
<b>Technical</b>			
Fully relational Microsoft SQL® database	✓	✓	
Fully relational Microsoft SQL® database (Edition: Express; License-free)			✓

# Acumin



## Building Strong Partnerships:

Through continuous product and service innovation strategies and relevant industry experience backed by hundreds of installations, **Dexco** has been providing enterprise-specific professional services automation solutions to the legal community for over thirty-five years. Fostering a "no-limits" culture, our systems have evolved perennially leveraging advances in technology and legal business practices, enabling our clients to gain competitive advantage with our highly effective professional services automation systems. What has not changed are the foundations of our success – our client centered, business process implementation approach, which focuses on industry best practices, our skilled team of technical and industry experts, and our commitment to innovation and collaboration for continuous product enhancement and client service excellence. The result is that our clients view their own success story as a strategic vision for tomorrow, rather than dependant on past achievements.

**Dexco** has the foundation and scope to support a new generation of business tools and client-centered services providing the markets in which it operates with innovative, intuitive and highly configurable alternatives designed to encourage timely decision-making in highly dynamic and competitive environments. Turning data sources into information resources; **Dexco** serves thousands of users across a variety of diverse markets.

Allow us the opportunity to show you why **Dexco** Corporation continues to be a leading solution provider and the right technology partner for your practice management and accounting requirements.

## Leverage the power of Knowledge Integration.

**DEXCO**  
is that partner.

Visit us today at

[www.dexco.com](http://www.dexco.com)

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## Imagine...

A company that provides a completely integrated Process Automation System for Professional Services Firms including: Practice Management Tools, Calendaring & Time Docketing Alternatives, Relevant Billing Options, Multi-Office Profit Center Accounting Opportunities, a Robust Reporting Engine, Human Resource Management Functionality and a Comprehensive Business Intelligence Platform – all specifically configured in accordance with the firm's strategic vision for a congruent approach to the execution of an individual's work plan.

**Dexco is that company**, delivering a "turn-key" solution that includes: conversion, implementation, deployment and training services as well as a "best-in-class" post-implementation client support model and professional services framework.

**Dexco** has been a leading provider of "Total" Professional Services Automation solutions for legal firms since 1974.

Europe • North America