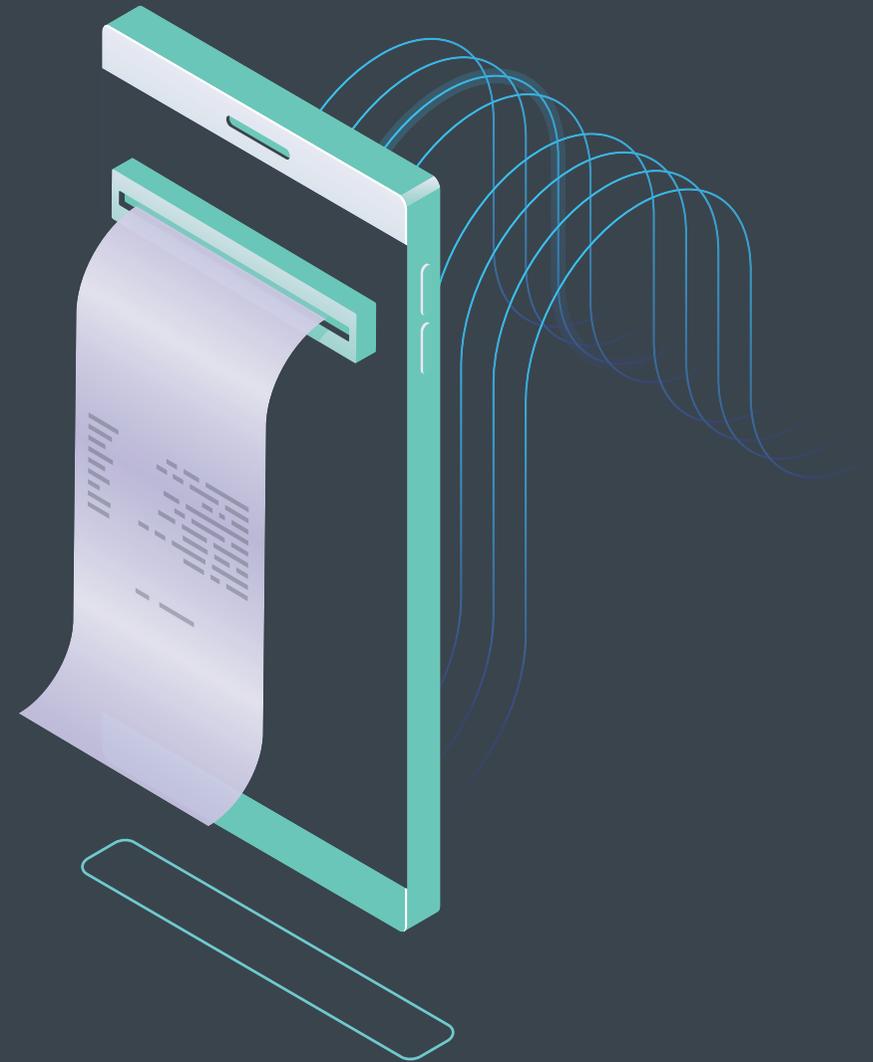


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# SAMPLE BILLING GUIDELINES FOR YOUR LAW FIRMS

6 practical examples you  
can use or adapt for your  
own guidelines.



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# INTRODUCTION

Your billing guidelines are a central part of your relationship with your law firms. Whether you're establishing them for the first time or reviewing existing guidelines, they help your legal operations run effectively by setting clear expectations on how you and your outside counsels work together.

You'll always want to include the specific needs of your own legal team when drawing up billing guidelines. Still, there are some common guideline violations that are experienced in legal teams in different companies, industries, and countries. You can use these sample guidelines as primer on some of the key points you'll want to consider when drafting billing guidelines. We also hope you can use it as a starting point for setting expectations and structuring ongoing relationships with your law firms.

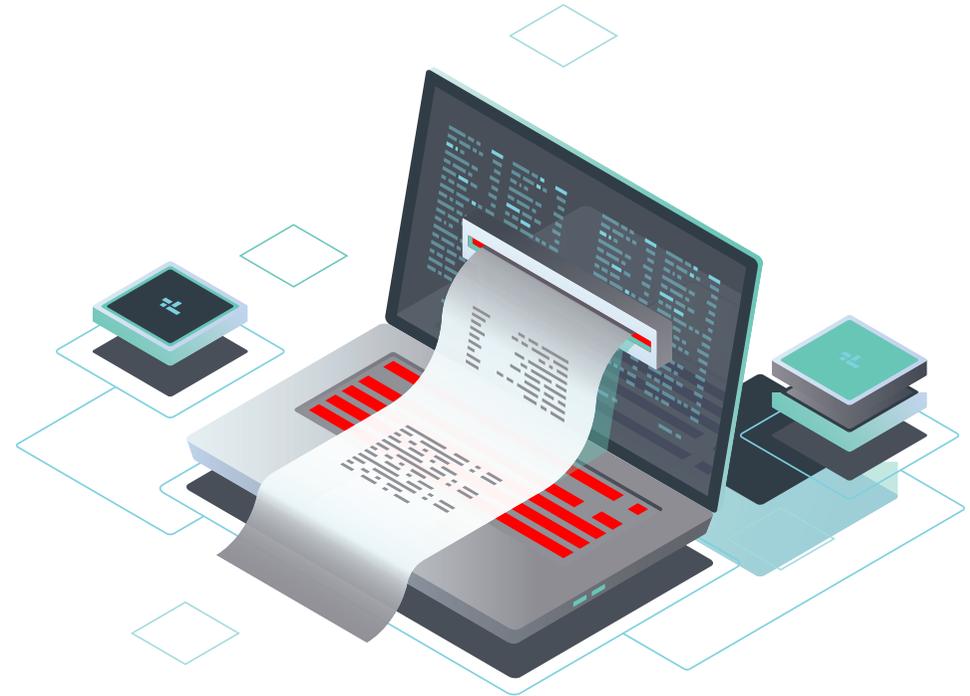
# PROJECT MANAGEMENT AND STAFFING

- We expect firms to appoint a Relationship Manager (RM) as our point of contact.
- Appropriate law firm staffing must be agreed between us and the RM.
- Firms must staff matters with the fewest lawyers needed for the matter.
- Firms must staff matters to an appropriately experienced counsel.
- We will not pay for 'reading in' by lawyers because of a vacation or staff departure.
- First-year associate lawyers can't be tasked with our matters without approval.
- We will not pay for training of junior lawyers on calls, in meetings, or during drafting.



# BUDGETS, FEES AND BILLABLE RATES

- Each firm must submit a budget with projected fees and costs per matter.
- We will review and approve these budgets.
- Budget adjustments must be agreed with us as the matter progresses.
- We will only pay hourly rates, or alternate rates, that we have approved in advance.
- Invoices should accurately reflect actual time spent providing legal services.



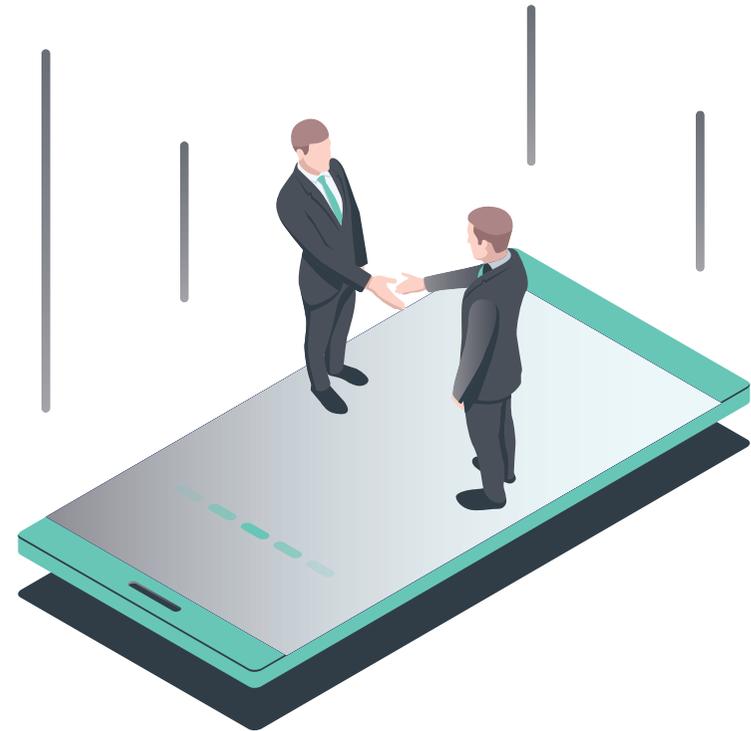
# INTERNAL COMMUNICATIONS AND RESEARCH

- While internal communications between lawyers is necessary, it should be used sparingly.
- We will not pay for internal meetings, conferences and correspondence in excess of 10% of the net fees of the legal invoice.
- Firms should not charge for research that could be done by – or would have a result already known by – any firm lawyer.



# PARTICIPATION IN MEETINGS AND ON CALLS

- We will not pay for more than one timekeeper to attend meetings or conference calls, unless approved in advance.
- Firms should limit the number of lawyers attending meetings.



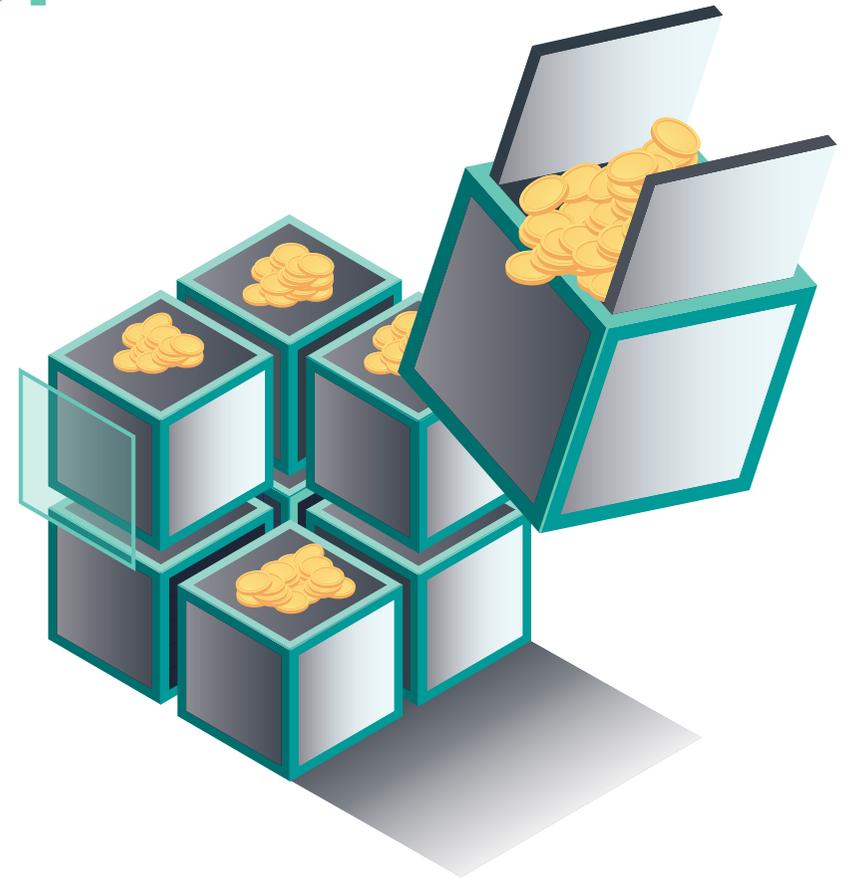
# TIME RECORDINGS AND TRAVEL

- We will not pay for timekeeper hours that exceed eight hours a day, from a single timekeeper, unless approved in advance.
- Travel time that is billed will only be paid when urgent legal work is performed and documented during that journey.



# NARRATIVE DETAIL, BLOCK BILLING AND FREQUENCY

- Firms must support billed tasks with narrative detail to help us understand tasks completed.
- Time on each activity must be recorded in separate time entries. Block billing is not allowed.
- We will discount block billing where multiple tasks are billed with a single time indicated.
- We will only pay for services billed in the service month's invoice, with limited exceptions.
- Invoices must be submitted each month, within 30 days after the end of the service period.



# STREAMLINE YOUR INVOICE REVIEW

Staffing, prohibited costs, internal communications and research are just some of the guideline examples we've given you above. Some teams may need to provide more detail and others less. Tools like Brightflag automate your invoice review and automatically apply your billing guidelines with consistency so your team can focus your relationships with outside counsels rather than admin.

Request a demo of Brightflag at [www.brightflag.com](http://www.brightflag.com) or give us a call:

**US** +1 (646) 661 2836    **EU** +353 1 906 0431    **Aus** +61 (2) 9199 1083



# WHAT WE WON'T PAY FOR

- Time spent on budget and billing matters
- Telephone, fax, mobile and data charges
- Data entry and file storage and retrieval
- Books, subscriptions, and education
- Completion of a Conflict Check
- Postage and courier fees
- Administrative work
- Engagement letters
- Overtime costs

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