

CASE STUDY

Mesmer & Deleault PLLC

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And we don’t waste our clients’ time ... We’ve become
a much more responsive, service oriented firm.”

Phil Decker, Partner



Mesmer & Deleault PLLC Attorneys

Intellectual property (IP) and business law firm Mesmer & Deleault, PLLC relies on the flexible, secure architecture of Treeno Software’s Enterprise Document Management (EDM) to streamline legal documents across multiple locations and between partners.

Industry

Business Law, Estate Planning,
Patent and Trademark
Litigation

Website

biz-patlaw.com

The Challenge

Law firms of all sizes and practice specialties are all too familiar with the seemingly endless piles of paperwork generated by a single act of litigation or contract generation, and Mesmer & Deleault was no exception. “*The filing cabinets were at maximum capacity,*” recalls Phil Decker, a partner at Mesmer & Deleault specializing in patent law. “*What’s more, we had an outdated method in place that made keeping track of information very slow and tedious. That slowed us down every time a client, attorney or patent agent would call.*” Decker says he was faced with two options: find an appropriate document management solution to remediate the space constraints and improve workflow, or invest in renting an off-site storage space.

Though he was strongly in favor of a document management solution, Decker says he had difficulty finding a solution that would dovetail with the firm’s existing software and processes. “*I talked to all of the major document management companies,*” he says. “*Most of the vendor solutions I saw were too labor intensive for what we needed. They also required too much change on our part. And their up-front investment made it a budget issue. We also wanted a solution that would unite multiple offices—even our homes if we wanted—and could address the multiple platform environment we had going with PCs and Macs.*”

The Solution

Decker chose Treeno Software after viewing a demonstration of the product at an MIT Enterprise Forum. “*The Treeno EDM (Enterprise Document Manager) met all of our needs in a document management, content and business process management solution, and we didn’t have to give anything up to deploy it,*” he says. The straightforward, userfriendly interface of Treeno EDM made it easy for Decker to convince his fellow partners to adopt it as their practice-

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wide system of choice. *"It required minimal training and the benefits were immediately apparent, from the elimination of lost documents to a highly secure, searchable repository of organized files that we could share seamlessly across multiple offices and with multiple partners."*

Decker says that the most time consuming part of the deployment process was entering the existing, paper-based data into the Treeno EDM repository. *"The actual installation of the software and system was almost instantaneous,"* he says. *"Scanning historical documents into the system once it was installed was less labor intensive than moving file cabinets to a storage facility."* He added that new clients to the firm are instantly entered into the Treeno EDM system, making them traceable within minutes.

Decker says he is most pleased about Treeno EDM's ease of use and interoperability with virtually any line-of-business application, including programs his firm relies on to generate and track court docket numbers, findings and pleas. *"The legal field is so focused on tracking, monitoring and accountability, especially when it comes to filing documents on behalf of our clients,"* he says. *"With Treeno, we could still use our existing applications without delay."*

The Results

Since instituting Treeno EDM as its document management solution, Mesmer & Deleault has saved countless person-hours that were once devoted to filing, copying, faxing and scanning paper documents. The firm also has noted a marked increase in customer satisfaction. *"Complete client files are always at our fingertips,"* he says. *"And we don't waste our clients' time by putting them on hold to find a file, or taking down information and calling them back with it later. We've become a much more responsive, service oriented firm."*

The firm has also streamlined its relationships with international partners. Because they file patent applications frequently—often with companies located in countries where the postal service is less than reliable — Decker says that the remote access offered by Treeno EDM has been an essential tool. *"I rely on Treeno to help me better serve my international clients,"* he says. *"One patent attorney we deal with on a regular basis is located in Lebanon. I can literally pull up a file while talking to him on the phone and deliver it electronically. Prior to Treeno I would have to fax it, which was not as reliable, or send it via courier and hope for the best."*

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Overview

Law Firms Rely on Treeno EDM to:

- Increase billable hours and improve client service quality
- Streamline the process of retrieving and distributing essential information
- Provide simultaneous access to client information
- Improve operational efficiency with minimal disruption
- Improve information security and document integrity
- Enable productivity tracking and accountability, ensuring turnaround requirements are always met
- Streamline compliance driven documentation requirements
- Simplify enterprise wide access to critical documents
- Reduce paper, paper storage, photocopying, and faxing costs

Law firms around the world are increasing productivity and improving customer service quality by commanding their content with Treeno EDM.

ABOUT TREENO SOFTWARE

Established in 2002, Treeno Software is a leader in the Enterprise Document Management (EDM) industry. Treeno Software’s mission is to provide their customers with operational workflow efficiencies and measureable return on investment (ROI) through the fast installation and implementation of their fully secure, highly reliable, and easy-to-use, web-based Enterprise Document Management (EDM) Software Solution.

To learn how Treeno can help you— call **800.528.5005** or visit us on the web at **treenosoftware.com**.