

Mesmer and Deleault PLLC

Intellectual property and business law firm Mesmer and Deleault PLLC relies on the flexible, secure architecture of Treeno Software's Global Content Management (GCM) solution to streamline legal documents across multiple locations and between partners. The result is evident - instant access to notes, dockets, findings and applications regardless of location. And, all partners and clerks are able to devote more time to servicing their clients in the fast-moving field of patent law.

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Phil Decker, partner, Mesmer & Deleault

Company

Mesmer & Deleault PLLC
41 Brook Street
Manchester, NH 03104

Service Area

National and international business law and estate planning; patent and intellectual property law

Industry

Business Law, Estate Planning, Patent and Trademark Litigation

Operational Impact

Delivered instant information access — All legal documents entered into the Treeno system are quickly retrieved, sorted, and filed in seconds—and never get lost.

Improved customer service and loyalty — Mesmer and DeLeault attorneys and law clerks no longer need to call clients, attorneys or the U.S. Patent Office back at a later date with information, because relevant documents are located within minutes, while the client is still on the phone.

Differentiated service offering — Clerks and attorneys now enjoy the ability to send electronic files to clients, opposing counsel and even court staff via email versus fax or standard mail.

Reduced demand for physical space — All paper files are stored electronically in a secure, central repository and on removable disks.

Simplified regulatory compliance — The law firm can now organize all docket numbers and confidential client information from day one, making compliance with state and federal regulations on privacy, as well as document storage, easier than ever.



TreenoGCM™ benefits:

- ▶ Instantly and easily finds any document
- ▶ Makes content centrally available to all – anytime and from anywhere
- ▶ Allows familiar workflow processes to remain intact – *we work the way you work*
- ▶ Keeps sensitive documents secure; available only with assigned access rights
- ▶ Automates document tracking and auditing
- ▶ Simplifies records management
- ▶ Eliminates lost records





Enhanced file protection — In IP law, paperwork can be the difference between owning and losing a patent. With TreenoGCM, the attorneys at Mesmer and DeLeault can guarantee protection against loss due to disasters, while critical information can still be kept on-site.

Improved transactional filing —Attorneys and administrative staff report a much more efficient alternative to their previous manual process of recording dates when documents were received in their database.

Irrefutable document integrity —The firm now has the ability to virtually eliminate any possibility that documents stored in their system can be altered without detection, ensuring undisputed authenticity of records

The Client

Mesmer & Deleault is a multi-partner practice specializing in business law, estate planning, patent and trademark litigation and intellectual property law. The firm has established two primary offices, with its headquarters situated in Manchester and a satellite office located in Portsmouth. The firm is comprised of three partners along with a staff of paralegals and administrative support employees. Though the firm is based in New England, they deal with international clients and counsel in business law matters, and are in constant contact with the U.S. Patent Office as well as other states in the U.S. where they file business documents on behalf of clients.

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 and Deleault was no exception. “The filing cabinets were at maximum capacity,” recalls Phil Decker, a partner at Mesmer & Deleault specializing

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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 PC's and Macs."

The Solution

Decker chose Treeno Software after viewing a demonstration of the product at an MIT Enterprise Forum. "The TreenoGCM (Global Content 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, user-friendly interface of TreenoGCM made it easy for Decker to convince his fellow partners to adopt it as their practice-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 TreenoGCM 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 TreenoGCM system, making them traceable within minutes.

Decker says he is most pleased about TreenoGCM'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 Outcome

Since instituting TreenoGCM 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 TreenoGCM 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."

The Legal Community relies on TreenoGCM 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

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Law firms around the world are improving client service quality and increasing billable hours with TreenoGCM. To learn more about how Treeno can help your firm, call us at **1-800-528-5005** or visit us on the Web at **www.treenosoftware.com**

