

ELITE CASE STUDY
PATTERSON &
SHERIDAN, L.L.P.

3E FIRM ENHANCES NEW BUSINESS PROCEDURE WITH METASTORM



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OVERHAULING MISSION-CRITICAL SYSTEMS

Patterson & Sheridan, L.L.P., is a mid-size intellectual property law firm with five regional offices. The firm specializes in all areas of intellectual property and has been ranked No. 33 out of 352 firms on the list of 2008 Top Patent Firms by IP Today.

In 2007, firm management decided to upgrade its accounting system and selected ELITE 3E® for the job. 3E is a Web-based financial and practice management platform with embedded workflow and reporting capabilities, plus the ability to easily integrate with other core firm applications through the Microsoft® BizTalk Server.

During this time, the firm conducted an overall workflow analysis and found that its new business intake (NBI) process was far from efficient. It was labor intensive, too many people were in the approval chain and it took too long to complete. Because the firm opens 300-400 new matters each month, its NBI process is mission-critical.

3E was able to streamline some key internal processes for Patterson & Sheridan, but the firm's NBI requirements were quite complex. The majority of the firm's business is focused on patent prosecution, so NBI therefore needs to be closely integrated with the 3E accounting system and the firm's third-party docketing program.

In addition, when an NBI request is initially made, a number of attachments that explain the details of an invention must stay with the request through conflicts checking, matter set-up and docketing—something the firm had been struggling to manage.

Finally, when the large number of matters required for each invention, all the attachments, and people in the approval chain were added up, the NBI process was ripe for automation and reengineering.

After the workflow analysis, Elite recommended the firm use a business process management (BPM) solution, Metastorm BPM®, from its partner, Metastorm, to drive

the NBI process. Leveraging their long-standing partnership, Metastorm BPM has been integrated with 3E through its Web services, which ultimately enables firms to improve business results by unifying strategy, analysis and execution.

Metastorm's ability to integrate with 3E and a variety of third-party applications is a powerful feature that eliminates data re-entry and keeps the matter moving through the NBI process. By utilizing 3E's Elite Services Bus functionality in conjunction with the BizTalk Server, Metastorm's unique BPM logic and information is inserted directly into the desired 3E workflow process. That means data collected by Metastorm is submitted to 3E and automatically maps to the correct fields in the appropriate format—without the need to map to each 3E field directly.

These capabilities, which are all transparent to the user, incorporate several key steps in the NBI process while keeping the big picture together. New matter set up, conflicts checking and docket set up are being completed within Patterson & Sheridan's NBI process.

TAPPING THE INTELLIGENCE AND AUTOMATION OF 3E AND METASTORM INTEGRATION

The embedded workflow capabilities from 3E and Metastorm presented the opportunity for Patterson & Sheridan to completely reengineer its NBI process.

Now a dedicated NBI manager receives requests and enters the client and matter information into Metastorm, which in turn forwards that data to 3E where the fields are automatically populated. A new matter number is generated, as well as a Potential Conflicts report from 3E Conflicts. The request is then sent to the Conflicts Committee where they can instantly approve or reject the matter based on the comprehensive information presented. Once approved, it is sent through to docketing where the matter's docket events are set up.

PATTERSON & SHERIDAN L.L.P.

The 60-attorney firm provides a comprehensive range of intellectual property legal services through five geographically diverse regional offices. Intellectual Property Today ranked the firm as having the second highest growth rate, year-to-year, in the number of patents prosecuted among the 50 top IP law firms across the country.

CHALLENGE

The firm has complex New Business Intake requirements for its patent prosecution practice involving multiple applications.

WHY ELITE 3E & METASTORM?

With 3E's integration with Metastorm BPM, firms can benefit from an advanced workflow process to standardize and automate business processes.

BENEFITS

- Significantly faster New Business Intake process – weeks to less than a day
- Standardized and streamlined NBI procedure
- More consistent data through single entry point
- Integration with multiple third party applications

The Metastorm BPM system is responsible for keeping all attachments about the client and its invention intact and attached to the original NBI request for final processing—a critical feature that was arduous in former procedures.

Because of the complex nature of the steps, the complete NBI process is being rolled out in stages. Stage one was simply reengineering the old way of processing NBIs on to the Metastorm BPM platform.

Currently in stage two of its implementation, end users submit the request to the NBI manager who starts the process in Metastorm. Stage three will give end users direct access to Metastorm to eliminate an extra step.

BEATING NBI GOALS

Using the integrated 3E and Metastorm BPM workflow solution, Patterson & Sheridan has standardized its most complicated and critical process. With a new streamlined protocol, single point of data entry and advanced technology to automate the process, the firm is experiencing more consistent data and faster processing.

In fact, the firm is proud to report that its NBI procedure, which took weeks for a result, is now completed eight hours ahead of its current service level agreements (SLAs) goal.

For more information about the integration with ELITE 3E and Metastorm BPM, please call **(323) 642-5200** or visit elite.com.

