

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

EARLY 3E ADOPTER EXPERIENCES INCREASED EFFICIENCY
AND REDUCED COSTS



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BLAZING TRAILS WITH ADVANCED FINANCIAL MANAGEMENT SYSTEM

In 2007, Patterson & Sheridan, L.L.P. was one of the first firms to deploy ELITE 3E®. The mid-size intellectual property (IP) firm's partners have always taken a proactive approach towards technology in order to maintain a competitive edge, so the decision to implement a next-generation financial management platform was an easy one.

"We wanted a system that did more than just accounting. We wanted a core intelligent business solution to interface with our other key functions such as docketing and document management. 3E met these requirements and was able to reduce some very labor-intensive processes," explains Controller Lynne Cillo-Capaldo.

The firm's prior accounting system was based on outdated AS/400 technology with a DOS-type interface. It was slow to respond to some common commands and was difficult to extrapolate information for reporting purposes. It was also completely disconnected from the firm's other main software applications, which necessitated duplicate client and matter data entries to populate other systems. The duplication of effort lacked protocol, which resulted in inconsistency in numbering conventions.

According to IT Director Ken Haass, it was a "slam dunk" to select 3E over competitive solutions. 3E met the firm's baseline technology requirements—Web-based, built on standard SQL back-end servers, scalable technology—and it provides an integrated development environment (IDE) that allows Haass and his team to configure the system to meet the firm's unique needs without costly outside consulting resources.

As an early adopter of 3E, the firm experienced some implementation issues along the way but, ultimately, they were thrilled with the decision. Patterson & Sheridan's IT and accounting department were able to provide input on how certain 3E features were developed and they credit the success of the implementation to Elite's world-class technical support and client service teams.

"Critical to the success of our deployment was the dedicated resources from Elite, from technical support to administration. The entire team was committed to resolving any problems as quickly as possible and the service we received was excellent," shares Cillo-Capaldo.

As the firm reaches its two-year milestone operating with 3E, it has upgraded to Version 2.5 for added stability and feature enhancements.

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Lynne Cillo-Capaldo
Controller

FLEXIBLE AND POWERFUL FINANCIAL MANAGEMENT

Cillo-Capaldo and her accounting team now consider themselves 3E power users as they manage all of the firm's billing, general ledger, accounts payable, trust accounting and time tracking functions in the system. The team is pleased with the overall efficiency improvements and enhanced features.

Cillo-Capaldo loves the capability and flexibility of the financial reporting metrics. Whether it is routine daily reports, monthly invoice statements or annual forecaster reports, she is able to easily query the data and generate the exact report she needs. The ability to "slice and dice" financial information allows her to deliver accurate meaningful data directly to the partners via their 3E Dashboards or email as a PDF.

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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 needed an advanced financial management system that could handle its billing and reporting needs and integrate with other core applications.

WHY ELITE 3E?

3E can be tailored to meet unique and specific requirements without the need for expensive software customizations or inefficient workarounds.

BENEFITS

- Increased efficiency through built-in workflow capabilities
- Better financial metrics to manage the firm more effectively
- Reduction of administrative overtime
- More productive IT support

“3E gives us a lot more options to access, format and distribute financial data to help partners make more real-time, better informed decisions to run the firm,” adds Cillo-Capaldo.

Clients also benefit from 3E. At any point in time, the accounting team can provide details on case history, current budget numbers and fees to foreign agents to keep them informed. In addition, 3E can accommodate most billing requests, such as flat-fee billing, which Patterson & Sheridan helped develop when they initially implemented 3E.

“Flat-fee billing is common among IP law firms, so we worked with Elite’s development team to build a flat-fee billing program within 3E. We were excited to be on the ground level of this initiative because all of our needs were addressed,” says Cillo-Capaldo.

3E’s efficient billing output options have also been a major advantage for Patterson & Sheridan. “Our old system didn’t offer PDFs as a billing format, so we had staff spend hours printing and scanning thousands of bills every month!” exclaims Cillo-Capaldo. “This led to overtime costs in our department.”

Billing Coordinator Kristi Sopchak is most appreciative of 3E’s overall performance when generating the multitude of month-end invoice types. “Even though our client base and professional staff has grown, my main processes to close out monthly invoices have remained the same. The difference is that 3E enables me to complete these processes much quicker,” explains Sopchak.

She points to the fully featured 3E invoice management program that allows her to work in several sessions simultaneously, as well as the option of accomplishing a task in many ways. “I find there is always more than one way of accessing the information I need,” she explains.

LEVERAGING CORE FIRM APPLICATIONS

The foundation of any IP firm is its docketing department. Due to Patterson & Sheridan’s high client-to-matter ratio, the staff manages a massive number of matters that require docketed events. In a typical year, the firm may prepare and file more than 1,000 patent applications and prosecute as many as 500 patent applications to issuance. The firm’s docket platform, Thomson IP Master[®], is therefore a major data source that can feed information to other core applications.

Haass was impressed with the 3E Web services integration that leverages the Microsoft[®] BizTalk Server in order to link the docketing and financial databases together.

Now, IP Master sends important matter information directly into 3E where custom fields are automatically populated through scheduled information updates. Accounting is able to query that information and generate very fine-grained reports, such as how many patents are in submission in a certain country. This information sharing extends to the firm’s document management system, iManage[®], which is also supported by SQL back-end servers, to help maintain matter-centric folders.

“We took an NBI procedure that could take a week or longer for a result and transformed it into an automated 3E workflow process that can be completed in less than eight business hours.”

Ken Haass
Director of IT

AUTOMATED NEW BUSINESS INTAKE PROCESS

Docketing also has a predominant role in the firm’s new business intake (NBI) process. Before 3E, the process entailed many steps. A docket clerk would input new client or matter information and then send the file to accounting, where Cillo-Capaldo’s staff would have to open their own accounting record. From there, conflict searches were performed by another manager, which were driven by a series of emails that required a response from certain parties before it could proceed through the rest of the process.

“The embedded workflow capabilities in 3E presented the opportunity for us to completely reengineer our NBI process,” says Haass. All new business requests are now generated in 3E when a Potential Conflicts report is generated. This report is automatically routed to the appropriate parties, where a two-level conflicts check is performed to ensure incoming business is not in conflict with any legal or business interests. Once approved, a new matter is set up in the system with all pertinent data. With 3E as the single point of entry, it streamlined the entire process and reduced duplication.

“We took an NBI procedure that could take a week or longer for a result and transformed it into an automated 3E workflow process that can be completed in less than eight business hours,” adds Haass.

TANGIBLE BENEFITS

At Patterson & Sheridan, 3E has no doubt succeeded in becoming the core system that interfaces with other firm applications for a more fluid working environment. The most tangible benefits include:

- **Increased efficiency** – Greatly improved NBI process and reduced data entry duplication efforts creating cleaner information for searching and reporting.
- **Better financial metrics** – Never before have partners been able to access firm reports through a Dashboard. 3E reporting capabilities enable meaningful data at their fingertips.
- **Reduction of administrative overtime** – 3E eliminated the need for billing staff to print and scan thousands of invoices into PDFs. Plus, the upgraded stability of the system generates bills faster.
- **More productive IT support** – Haas estimates that his team has cut the amount of time supporting accounting and timekeepers by 50 percent. Being able handle most development needs in-house has also reduced outside consulting fees.

“We’ve been using 3E for a while now, and people forget how slow and primitive the old system was,” says Cillo-Capaldo. “3E has taken our department and the firm to a new level of effectiveness and productivity.”

The team is looking forward to implementing the Version 2.5 enhancements for the 3E Profitability and Collections modules. “We continue to receive unmatched support from our Elite team, who will help us get the most out of our 3E investment,” says Cillo-Capaldo.

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Cillo-Capaldo

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For more information about ELITE 3E, please call (323) 642-5200 or visit elite.com.



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