



Case In Point

A Motion to Deny Missing Files

"It is totally refreshing to get a product that does exactly what it's advertised to do."

—Bill Westerman, Managing Partner,
Westerman, Hattori, Daniels & Adrian, LLP (WHDA)

The Law Firm

Founded in October 2003, Westerman, Hattori, Daniels & Adrian, LLP (WHDA) is an intellectual property firm based in Washington, D.C. The firm's primary niche is securing U.S. patents for foreign companies — especially for a robust roster of clients in Asia. Though WHDA is something of a new kid on the block, about 60 percent of its 50-member staff worked together earlier at another D.C. firm. Partners Bill Westerman and Ken Hattori started working patent cases together in 1983. Scott Daniels joined them in 1986, followed by Steve Adrian in 1991. Today, WHDA maintains a growing client base and roughly 4,500 active files.

The Need

As a start-up firm, WHDA and its staff benefited from their prior experience with tracking their physical files, roughly one-third of which are pulled from the central file room at any given time. In the pre-WHDA environment, office personnel had depended on an essentially unreliable manual system of using cards to sign files in and out of the central file. "Quite frankly, it rarely happened," says Art Brooks, administrator/controller. "People either forgot to sign out files or were too lazy."

Consequently, when critical deadlines loomed and essential files were at large, "the hunt was on," Brooks says. Time-consuming searches for missing files cut deeply into staff productivity. Meanwhile, the firm's employees received as many as five or six "missing files" e-mails a day. "When you're using e-mail that way, people become so inured to it

they don't even bother to look," says Lisa England, WHDA's operations support manager. So, when WHDA prepared to open its doors, the fledgling firm was determined not to tolerate an inefficient filing system. "What we want from our system is simply to know where our files are, at all times," Brooks says.

The Solution

WHDA considered two barcode systems and a pair of RFID solutions, including the 3M™ RFID Tracking System. "Other systems emphasized such features as conflict-of-interest tracking and built-in reporting capabilities that we didn't really care about," says Brooks, who notes that the 3M RFID system offered exactly the features the firm needed.

WHDA purchased the 3M™ File Tracking Systems including two 3M™ RFID Tracking Pads, a 3M™ RFID Handheld Tracker and 3M™ RFID Tracking Tags for all its files. The system was installed over one weekend. First, the 3M database was populated with the firm's client records. Next, one team of employees affixed a paper-thin 3M™ Tracking Tag to each file, while another matched each tagged file to the information in the database. Finally, a third team shelved all the files in the new central file room. "We were up and operating Monday morning, and since then it's been essentially a flawless operation," reports Brooks.

IWHDA positioned one tracking pad in the file room and another with the docketing person, who creates new files or updates existing files when the firm receives new client-related documents. Once a week, an



employee patrols the firm's floor with the handheld tracker to update the database – which can be accessed from the desktops of all the firm's 50 employees – on the locations of files that are being worked on outside the file room. Once a month, the handheld is used for an inventory of the file room itself. The handheld tracker also enables users to input the identifying numbers of missing files and, if the tracker detects those elusive files in the office, it notifies the user with a distinct “beep.” “We haven't had to use the find feature yet because the system has worked so well that we've always been able to locate our files,” England says.

The Results

Since WHDA installed the 3M™ RFID Tracking System, Brooks notes, employees have received in six months about the same number of “missing file” e-mails that they used to get on any given day. The system has helped both to boost productivity and reduce labor costs. As a result, Brooks says the firm expects to return its investment in less than a year. “It is totally refreshing to get a product that does exactly what it's advertised to do,” says Westerman, who applauds his 3M team for providing consistent support. “They asked if we could suggest any improvements to make the system better. Our answer was no.”

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