



Transition support: Helping a law firm transition to a new IP management system

To better serve IP clients, Crowell and Moring implemented FoundationIP

Customer

Crowell & Moring LLP

- Founded in 1979
- Based in Washington, D.C.
- 11 offices with 675 attorneys
- Robust IP practice

Crowell & Moring LLP is a highly respected law firm with a broad array of practice areas. Its intellectual property (IP) practice serves marquee clients in jurisdictions worldwide. In 2021, IP law firm Brinks Gilson & Lione combined with Crowell, creating an expanded patent and trademark practice. The firm turned to Clarivate™ to execute a smooth implementation of FoundationIP™. The project was a dramatic example of Crowell's commitment to deploying modern technology to better serve its clients.

Challenge

From on-premise to cloud

While Crowell & Moring was already using FoundationIP, the Brinks team had been using an on-premise IP management system, or IPMS. Moving the Brinks team to a cloud-based system presented a challenge for both Clarivate and

the newly combined Crowell team, according to Director of Docketing Mark Rolla and Manager of Docketing Solutions Alice Juhasz.

In addition, the new Crowell team had a number of custom applications to integrate with FoundationIP. "Our attorneys and clients have grown to rely on these highly customized applications, and we wanted these applications to function with the new system," says Juhasz. Rolla adds, "This was an important objective for us."

Process

Successful implementation

The process started with an in-depth needs assessment to enable the Clarivate implementation team to gain a clear understanding of the existing data assets and workflow processes.

Throughout the implementation process, clear communication was maintained through weekly meetings and a shared project timeline management tool.

"This was critical to the success of the project. We could easily see where we were, what was next and what was down the road," Rolla says.

Clarivate successfully completed the complex implementation project in just 13 months — exceeding the Crowell team's expectations.

"I can't say enough about the work performed by Clarivate. We met all of our milestones. Even during the holidays, the Clarivate team worked with us to make sure deadlines were met," Rolla says, noting that following the launch of FoundationIP, Clarivate provided premium-level support to ensure a smooth transition to the new system.

Juhasz adds: "The Clarivate team is very knowledgeable and highly skilled technically. They were the exact people we needed to pull off this implementation project."



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Mark Rolla
Director of Docketing

A state-of-the-art IPMS

Now that they have been using FoundationIP for more than a year, the Crowell IP operations team is benefiting from the system's state-of-the-art capabilities, time-saving features and user experience.

"We have found FoundationIP to be very intuitive, especially for attorneys and paralegals, who find it very easy to access information. It's very user-friendly," says Juhasz, who also has praise for the robust reporting features within FoundationIP. "We're able to pull data easily from the front end."

Key FoundationIP features that the team appreciates include:



The data verification tool, which helps ensure the accuracy of data added to the system from outside sources. "That's been very helpful to us when we need to do client portfolio reviews," Juhasz explains.



Matter attributes, automatically launching appropriate actions for consideration based on docketing team responses to questions. "Our docketing team has reported this as a very valuable feature," Juhasz explains.



Customizable reports, making it easier to upload templates to meet client-specific preferences. "So when we export data from FoundationIP, it is automatically manipulated to fit the format without any manual work," Juhasz says.



Bulk matter updates, allowing the team to update hundreds or thousands of cases with a single "pull" of data. "This saves an enormous amount of time," Rolla says.



Patent and Trademark Office (PTO) data updates, via integration with an in-house application, enabling daily updates from the USPTO. FoundationIP connects with Crowell's custom applications to automatically generate notifications for attorneys and for clients requesting updates, complete with a PDF.



Report dashboards, enabling attorneys to access the latest data in a personalized dashboard view without having to submit a request to the docketing team, reducing that team's workload.



Mark Rolla

Director of Docketing,
Crowell & Moring LLP



Alice Juhasz

Manager, Docket Solutions
Crowell & Moring LLP

Services

Lessening the burden

Along with FoundationIP, the Crowell IP operations team also has a service relationship with Clarivate, relying on Clarivate experts to perform a variety of administrative functions, including:

- Docketing with peer review, reducing the burden on Crowell's in-house docketing team. Clarivate also provides an additional "second eye" review on patent docketing to help ensure accuracy and compliance with jurisdictional requirements. "They do a fantastic job. If items need to be updated manually for any reason, they step right in to help us," Rolla says.
- IDS service, handling administrative tasks associated with preparing Information Disclosure Statements (IDS) for filing.

Impact

A beneficial partnership

The move to FoundationIP, together with Clarivate services, has helped the Crowell IP operations team work more effectively and efficiently. Key to the project's success is the partnership between the two teams.

"The partnership has been very constructive. We have worked together as colleagues to meet our goals," Juhasz says. Rolla adds: "We have formed a strong bond with Clarivate to meet our clients' needs. It's one cohesive team."

That collaboration benefits all stakeholders, Juhasz notes. "Clarivate provides the exceptional technology, services and people to our law firm, helping us better serve our clients."

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Manager of Docketing Solutions

About Clarivate

Clarivate is a leading global information services provider. We help people and organizations think forward by connecting them to intelligence they can trust to transform their perspective, their work and our world. We are the partner law firms and companies rely on to transform the way they create, manage and protect intellectual property. Our comprehensive intellectual property data, software and expertise helps companies drive innovation, law firms achieve practice excellence, and organizations worldwide effectively manage and protect critical IP assets. Clarivate is home to Derwent Innovation™, CompuMark™, Innography™, Darts-ip™, IPfolio™, FoundationIP™ and other leading IP solutions.

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