

Case study | IP Services

# Improving security and accuracy with docketing services

In 2019, an international leader in ophthalmic optics turned to Clarivate™ to streamline its docketing process.

**The company focuses on the design and manufacture of lenses to improve and protect eyesight and develops equipment, instruments and services for eyecare professionals. Allocating more than €200 million to research and innovation every year, they are committed to continuously bring new, more effective products to market.**

The IP department is made up of 30 employees and is supported by an administrative team of six. Focusing mainly on the United States, China, Brazil, India, Europe, and South Korea, the team files around 120 patents per year.

## Reducing the workload

Charged with finding solutions to help the IP team become more reactive, one of the company's IP portfolio managers discusses how the IP team turned to Clarivate and describes her first experience of working with our docketing team.

"Before turning to Clarivate for docketing, our IP department used a designated mailbox where all administrative emails were sent. Each paralegal was assigned two to three patent attorneys and would have to manually drag the emails into their corresponding folders. Over time, and with more and more projects requiring attention, the sheer number of emails became too much to handle for my team."

**"The team understood our internal processes very quickly and all their questions were relevant, helping us to improve our method of docketing emails."**

**IP Portfolio Manager,  
worldleading ophthalmic optics company.**

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To reduce their workload so that they could focus on higher-value work, they started looking for external support. Initially, trying out a local company for docketing support, they soon realized they needed people with more expertise in their IP management system (IPMS), provided by Clarivate. Our team represented an obvious choice.

#### **Training in two different systems**

Since the IPMS was delivered by Clarivate, the Clarivate team did not need to be familiarized with the software. Giving IT access to the team turned out to be a bigger challenge during onboarding. Once the IT steps were completed, regular meetings were held to explain the optics company's specific method of data entry for the IPMS.

"This 'training step' consisted of weekly 1-hour meetings from the middle of October to the end of 2019. We carefully went through our internal procedures for each jurisdiction," our client notes.

Additionally, during those months of training, she implemented a shared spreadsheet to review all email communications and to share what was right and what was wrong. "During those two months, I spent about 25 hours reviewing all the emails. I wanted to be sure that everything was right. Missing deadlines can be dangerous. Failing to respond in time might lead to losing a patent."

Together with the Clarivate team, the client designed a process to handle data in two different ways. The first was to review emails and enter all the important data into the IPMS in a specific way. Secondly, they were trained to save the emails on a custom-made patent library platform.

# 120

patents filed by their IP department approximately per year to ensure new and more effective products are brought to market.



# 100%

accuracy rate achieved in the 150 emails handled between February and March 2020.

The team needed some time to adjust to the company's custom-made platform, and during the training, mistakes such as forgetting to create an event, or not saving something with the correct tags were made, see example opposite.

"The Clarivate team had to learn two ways of entering data, as well as all the company's guidelines for the different jurisdictions during those two months of training. They easily gained an understanding of all our internal guidelines."

## **Mistake example**

When a search report is received, a watching event should have been created and entered in the foreign filing folder. That did not always happen, and for an email to be saved correctly, it should be tagged with the right information including the case number, country and filing type.

# "Clarivate can be proud of its team and the quality of their work."

**IP Portfolio Manager,  
worldleading ophthalmic optics company.**

## **100% accuracy rate**

One month after the training was completed, the IP portfolio manager continued tracking emails carefully. During February and March 2020, 150 emails had been handled and 0 mistakes had been made: an accuracy rate of 100%.

By the beginning of May 2020, the number of emails had more than tripled and risen to 461, with only one mistake made. "That mistake concerned an uncommon type of action; one that was not clear for us either. It was an unusual event. One that we never received before," she admits.

With the support of Clarivate, our customer was able to put a few extra security measures in place. While Clarivate does

the docketing, each paralegal now has the time to verify those docketed. Additionally, when a new event is entered in the IPMS, the Clarivate team is asked to put a reminder in place, closer to the performed action, thus leaving more room before the deadline. This way the patent attorneys see the event appear much sooner in their agendas, effectively creating more time to respond.

Satisfied with our proven expertise in patent docketing, the optics company is already looking to further strengthen the partnership. Plans to use the Clarivate Docketing Services for trademarks have already been set in motion.



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