

Case study | Volpe & Koenig

Evolving to support the changing needs of clients

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Challenge

Volpe & Koenig, P.C. is a full-service boutique intellectual property law firm with more than 50 intellectual property attorneys, patent agents and technical advisors, and approximately 40 support staff.

The firm specializes in many areas of technology and has served a diverse roster of U.S. and global clients for more than 30 years.

Volpe & Koenig has a long-standing partnership with Clarivate™ that has continued to grow as the firm has changed to best support their clients.

Objectives: Firm Modernization

Attorney Michael B. Smith joined Volpe & Koenig out of law school and has been with the firm for over twelve years. In 2014, he was promoted into a management role to lead the docketing department through modernizing their approach and systems.

With fixed fees becoming the norm, the firm was looking for a way to continue providing high quality work for their clients, while striving to be as efficient as possible.

Eliminating manual steps to significantly increase the firm's efficiency, opening the support team up to refocus on more valuable efforts, and at the same time eliminate the risk of human errors became the key objective.

"When I started at the firm," Smith said, "I don't think we had any clients that were flat fee clients. Now, most of our clients are fixed-fee clients. Hourly rates are probably going to be a thing of the past."

The firm's client needs were changing but they still had very manual processes. "Before, our support team had to log on to the PTO websites and manually download every piece of correspondence. The number of documents ranged from 50 to over 100 per day. This single activity required

hours of manual effort each week." In addition, manually downloading the documents introduces the risk of missing a document that could lead to a notice of abandonment for one of Volpe & Koenig's clients.

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Solution

Efficiency gains with automation and Docketing Services

Automated docketing with FoundationIP®

In their search for automated docketing functionality, Volpe & Koenig's committee of partners vetted various software providers and chose FoundationIP because of the automation and ease of use it provided the support team. Certain features like the "events module was a gamechanger for us."

With the new IP management software in place, the entire manual docketing process made way for automation, saving huge amounts of time. Everything that gets mailed is now automatically downloaded by the software, and legal assistants no longer have to run the docket and go over it with their attorneys every Monday morning. Automated reports specific to each attorney are now directly sent to their inbox.

The biggest challenge in implementing the new software was that 95% of the firm had to learn a new system after having been on the old one for over 10 years.

"The Clarivate team did an excellent job of getting everyone comfortable and trained on FoundationIP," Smith remembers.

The FoundationIP events module in combination with the support team in India has also eliminated human errors. "Since implementing the events module with the support of team in India, I can't think of anything that has gotten missed. I believe our accuracy rate is 100%," Smith states.

The efficiency gains are massive as the firm has been able to shave off two and a half to three hours per day on manual work:

90

minutes of manual downloading time saved on average each day.

60-90

minutes of manual processing time saved on average each day.



100%

accuracy rate has been achieved
by eliminating human error.

Outsourced docketing services with the Clarivate India team

Looking for additional areas to streamline, Volpe & Koenig also leverages Clarivate for docketing services helping with USPTO correspondence. The firm could no longer keep up internally and they expanded the services to include support for PCT and foreign docketing. Today, Volpe & Koenig trust the docketing services team in India as an extension of their support team, handling about 90 percent of their docketing work.

Having the Clarivate docketing team in place also eased the transition to FoundationIP since they were already experts in docketing in FoundationIP. The fact that qualified IP

professionals are hard to find, this team is extremely valuable to the firm. By the time his team starts their day, everything has already been docketed and reported overnight.

"We could lean on them to help us learn the system. We didn't need to worry about any ramp-up in terms of them working within the software. They are adaptable and very knowledgeable when it comes to IP Law. They make life easier for us, doing the brunt of the docketing work and helping us with administrative tasks. Anything we throw at them, internal quirks or procedures, they are willing to take them on."

The confidence in Clarivate never wavered and the strong partnership has given the entire team at Volpe & Koenig tremendous piece of mind.

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Outcome

Peace of Mind

"Switching docketing software while the same time shifting our docketing work from an internal to an external team was a major change, but the support we received was phenomenal. I have full faith in the software and the Clarivate docketing team."

Volpe & Koenig has leveraged the software and services as well as the expertise of the Clarivate team to meet the challenges of the changing IP industry and the increasingly demanding needs of their clients for over six years. The firm has reached a level of modernization and efficiency that they and their clients are pleased with as they continue to grow.



Client profile

Industry

Technology sector
intellectual property

Portfolio

U.S. and international clients

Challenge

Delivering high quality work amidst changing client expectations; harnessing the advantages of automation



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