

Case study | Wagner Blecher LLP

Helping to lay the foundation to become a premier intellectual property practice

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Challenge

Wagner Blecher LLP was formed in early 2007 by patent attorneys John Wagner and Matt Blecher as a small intellectual property (IP) firm tailored specifically to technology companies.

With a combined experience of over 30 years as registered patent attorneys, partners Wagner and Blecher wanted to capitalize on the need for more comprehensive and customized IP and service management practices in launching their firm.

Since laying its roots in California's Silicon Valley, Wagner Blecher, with its 19 staff members, proved that it can take on large clients for a firm its size. One reason for this success is the firm's use of a state-of-the-art IP management system, which Wagner Blecher coupled with its steadfast strategy on being innovative.

The firm

Wagner Blecher exclusively focuses on patent prosecution for hi-tech companies whose products range from sensory touch pads to zip drives to streaming media. Located in Watsonville and Campbell, California, the firm services clients with concentrations in electronic and electro-mechanical technologies that have portfolios ranging from one to 1,000. The firm has a total account management services approach: a paralegal assistant and agent are responsible for a set of accounts, thus giving Wagner Blecher the ability to deliver personable, tailored service to all its clients.

1.5K

current patents are managed by the firm, including close to 200 new applications and over 500 responses annually.

IP management challenges

In order to support the firm's growth strategy and position itself as a premier IP practice able to take on larger clients, Wagner Blecher determined it needed to implement a new IP system and services approach.

The existing IP system at the time had become obsolete: it was difficult to use, was not scalable and the absence of a well-designed user interface limited the firm's ability to complete critical file transfers. Its limited functionality made it cumbersome to pull essential information, thus providing poor reporting. Furthermore, the data entry process required by the existing system increased risk for errors and omissions and consequently delivered unreliable data. Realizing these drawbacks could hinder the firm's desired growth and goal in becoming a premier IP firm, Wagner Blecher looked at other IP management systems and upgraded to one with robust functionality, flexible technology and consistent reliability.



Client profile

Industry

Technology sector IP legal services

Global portfolio

1,500

Challenge

Management of entire IP process from a single website via FoundationIP™

30+

years of experience as registered patent attorneys.

"FoundationIP is the cornerstone of our firm's business development strategy. It is supporting the firm's goal to empower our clients to wholly manage their portfolios seamlessly in one central IP system through Wagner Blecher."

John Wagner,
Partner, Wagner Blecher LLP.

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Solution

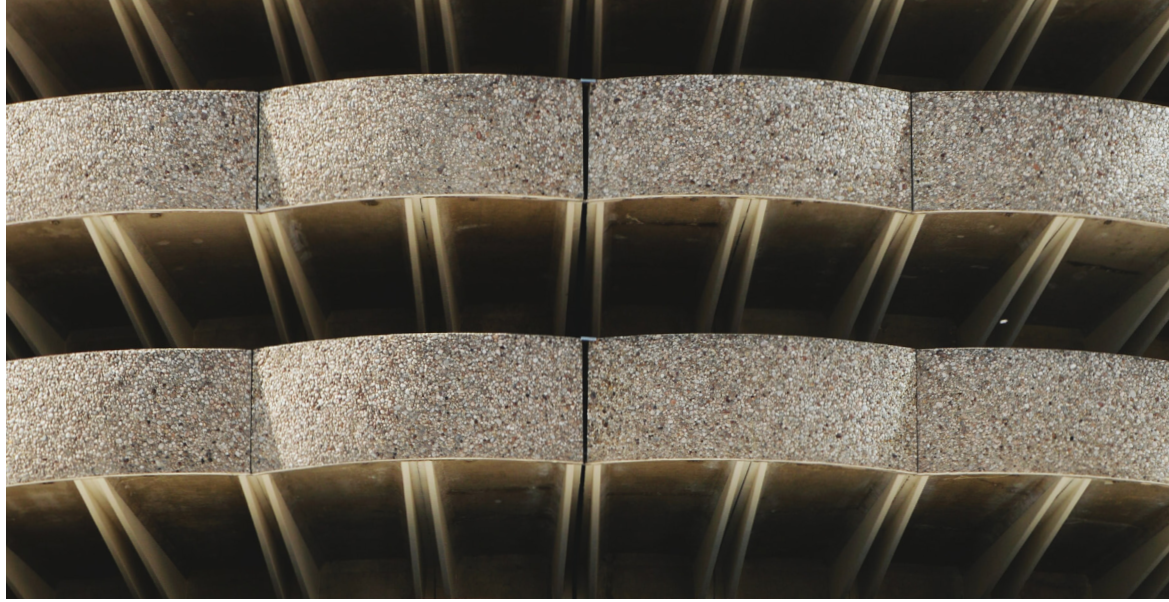
After evaluating several providers, Wagner Blecher selected an IP management system that was more reliable, functional, and effective, and met the firm's increasing technological and IP management needs.

The IP management system Wagner Blecher chose to help position itself as a premier IP firm was FoundationIP, a software solution for IP management by Clarivate.™

FoundationIP is a web-based IP management system that provides an online environment to manage matter-related information and activities. FoundationIP addresses the growing need faced by IP attorney firms, like Wagner Blecher, to reduce the overhead and inefficiencies inherent in the paperbased IP management processes. Additionally, FoundationIP incorporates people outside Wagner Blecher's own organizational boundaries into the prosecution workflow.

1-1K

portfolio asset range
of Wagner Blecher's
electronic and electro-
mechanical clients.



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Outcome

Since implementing FoundationIP as the firm's total IP management solution, Wagner Blecher has observed multiple advantages.

Empowering clients

One of the biggest advantages FoundationIP gives Wagner Blecher is its capability to effectively provide a reliable and secure online environment where the firm can manage all matter-related information and activities in collaboration with people within or outside the firm. Wagner Blecher's clients have customized access to view authorized information and perform tasks as collaborators in the IP management process.

Clients enthusiastically embrace the idea of managing their portfolios on demand in one central repository where they can view the docketing process at any stage. Likewise, Wagner Blecher can access its clients' portfolios whenever and wherever without having to engage clients into unnecessary collaboration; data is readily available to the firm around the clock.

Not only does this decrease response time, but it reduces the likelihood of unmanageable communications and undocumented messages. The improved collaboration between Wagner Blecher and its clients strengthens the firm's client relationships.

Furthermore, clients enjoy the same benefits of FoundationIP that Wagner Blecher does: It is reliable, accurate and consistent. These results help position Wagner Blecher as a premier IP practice. According to Emilie Benschoter, the firm's docketing specialist and patent paralegal, clients are confident with FoundationIP's ability to deliver reliable and accurate data; the automated workflows ensure dates are not missed and references and related patents are automatically tracked.

Full enterprise IP management system

FoundationIP provides enterprise IP management solutions enabling Wagner Blecher to electronically manage its entire IP process from a single webbased system. FoundationIP houses all the firm's information, including case history, scanned copies of actions, drafts, invention disclosures, and more, all from one easy-to-use interface.

Wagner Blecher achieved these benefits through the use of technology by Clarivate:



Reliability and accuracy

FoundationIP automatically flows references within a family of cases. This is vital for managing clients with multifaceted portfolios. Within these families, if a reference is cited in a communication from a Patent Office, a Supplemental IDS is simultaneously docketed and the references to be cited flows to all related matters. This ensures that there is no confusion on which references have been cited or need to be cited. This feature creates consistency throughout the system making the data reliable and accurate.

Not having to worry about the accuracy of the data allows Wagner Blecher to concentrate on delivering first-rate client services.



Timely compliance

As rules change, they are updated in FoundationIP. It is imperative for the firm to have current rules that are compliant with its local jurisdiction to mitigate risks.



Efficiency through automation

FoundationIP provides advanced tools to automate the creation of standard and custom forms and letters, generate reports, track and propagate references, view patent families, and create and track docket dates. This reduction in administrative tasks allows Wagner Blecher to be more efficient, thus creating more time to concentrate on client management and business development.



Scalability

The FoundationIP modular platform is designed to grow with Wagner Blecher, and the firm can add on more modules for more functionality as needed. The ongoing development and scalability of products and services by Clarivate ensure that Wagner Blecher can position itself as an innovative IP practice.



Practice management improvements

The extensive functionality within FoundationIP improves Wagner Blecher's IP management and practice. The system allows the firm to completely electronically file resulting in these benefits:

- The administrative actions are now automated which promotes more productivity amongst the entire staff.
- Access to information and the ability to follow up on cases are easier because data is electronically captured in one central place.
- Tremendous reduction in postage fees and paper use.
- Saves staff time while freeing them to focus more on substantive activities.



Real-time accessibility

Because the platform is web based, FoundationIP is designed to give on-demand access to Wagner Blecher and its clients for real-time management of their portfolios.



Robust reporting

The system's reporting capabilities give Wagner Blecher not only a wider view of its clients' portfolios but also the ability to hone in on exactly what the firm needs. The system's full reporting functionality allows Wagner Blecher to:

- Run reports on demand which can be turned around quickly.
- Set up automatic reports on different schedules, either daily, weekly, monthly or whenever the firm or its clients choose. This provides the associates, clients and any other approved individuals involved in the case consistent data and reports; they have a global and detailed view of their portfolios anytime they choose.
- Execute reports that alert the staff of upcoming due dates, as well as events and action items that are essential in successfully managing their cases.
- Manage workflow and resources.

The partners run a workload report every month that assists them in determining how much to assign each associate. This is extremely helpful in reallocating work to other associates as needed and creates a great amount of efficiency as staffing needs are always appropriately met on cases.

- Oversee important areas of its IP process. Wagner Blecher executes ad hoc reports and also schedules running reports on such matters as foreign links, upcoming due dates, status reports, and quarterly client reports.

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and create and track docket dates."**

**Emilie Benschoter,
Docketing Specialist / Patent Paralegal, Wagner Blecher LLP.**

Contact our experts today:

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