

Case study | Guntin & Gust

# Driving client loyalty with a tailored service strategy

**How a growing IP law firm maximizes client satisfaction by delivering accurate, efficient, customized services with help from FoundationIP.**

In today's competitive legal marketplace, IP law practices must deliver maximum client value with unprecedented speed and efficiency. Top-ranked firm Guntin & Gust<sup>1</sup> relies on FoundationIP™ to help optimize its IP management processes, delivering highly personalized services while freeing staff from time-consuming administrative tasks.

At Guntin & Gust, everyone – from attorneys and paralegals to administrative and accounting staff – plays an essential role in the firm's success.

"Everything the client sees, hears and touches has to be exceptional," explains Ed Guntin, president and managing partner, adding that consistently delivering services in the way each client prefers is a key challenge for any legal practice.

<sup>1</sup> [www.ggip.com](http://www.ggip.com)

## Challenge: meeting client preferences

"Every client has a certain way they want things done, from email reports and handling office actions to communicating with inventors and handling non-provisionals," Guntin explains. "Most firms rely on their staff to learn the nuances of each client. But it's difficult to get it right consistently."

As a tech-savvy IP attorney, Guntin recognized early on the role of technology in meeting this challenge. He also recognized the value of a cloud-based IP management platform. "Previously, I had experience using an on-premise, client-server system. It was very clunky and it wasn't easily accessible outside the firm," Guntin says, noting that remote access was a priority, as the firm he and managing partner Andrew Gust founded in 2010 would be virtual from the start. Attorneys and paralegals would need easy access to information in real time, regardless of their location.

## Solution: customizable IP management

Guntin embarked on a search to find the right IP management solution for the new firm. Based on a recommendation from a colleague, Guntin looked into FoundationIP. He liked what he saw. "What caught my eye was that FoundationIP is customizable," he explains.

FoundationIP's flexible design enabled Guntin to create workflow templates with custom rules for each client, aligned with their preferences. "When we docket something, FoundationIP detects which client it is for and automatically follows a workflow specific to that client," he explains. "This helps us give each client exactly what they want, every time. That has been a huge factor for us in developing client loyalty."

## Automating accuracy

Clients also expect information to be handled accurately, avoiding errors which could negatively impact their IP rights. Guntin notes that FoundationIP has automation features that improve both accuracy and efficiency, reducing risk.

Automated data verification and enrichment verifies the IP portfolio in minutes, identifying any discrepancies, with the option to update client data in bulk and data verification in combination with a comprehensive country law rule engine. These features enable Guntin & Gust to confidently ensure the accuracy of their clients' portfolios. "Precision is very important in docketing. If you miss a critical deadline, there is no remedy. Having this validation helps reassure the client that we know what we're doing," Guntin says.

He points to patent application data sheet (ADS) forms as another example. "It is very important to get the information in that form correct. By automating the population of priority data into application data sheet forms, FoundationIP helps eliminate human error. That's huge," Guntin says.





In addition, Guntin and Erik Boyd, Quality Assurance Paralegal at Guntin & Gust, have worked with the Clarivate product development team to develop a solution for computing accurate United States patent expiration dates that take into account terminal disclaimers, patent term adjustments and extensions. This capability has been applauded by many FoundationIP users.

## Planning and productivity

Planning is another important capability for IP operations and Guntin calls FoundationIP's reporting features "phenomenal." The firm uses billing and task management functions to track time spent on specific tasks, enabling them to analyze operational activity and generate useful forecasts to help manage their workload.

"We use FoundationIP's reporting features to model anticipated future work to inform strategic decisions regarding resources and hiring," Guntin explains.

FoundationIP has also helped Guntin & Gust reduce administrative bottlenecks and repetitive manual tasks, enhancing practice productivity and avoiding costly mistakes. "It definitely helps our paralegals and attorneys spend more time on higher value work," he says. "I can say with confidence that it has helped us reduce non-billable activities."

## Integration solutions

Flexible application programming interfaces (API) allow Guntin to easily extract data from FoundationIP for use in other programs, as well. For example, the firm developed its own checklist program that integrates with FoundationIP to help ensure no tasks are skipped in critical processes, such as filing a patent application.

FoundationIP also helps streamline patent annuities, integrating seamlessly with renewal services from Clarivate, enabling renewals with just a few clicks. Outsourcing renewals administration dramatically reduces exposure to risk of errors and potential professional malpractice actions.

"The integration with annuity services streamlines administration and helps prevent potential missed renewals," Guntin says, noting that the Clarivate annuities team also keeps track of upcoming renewals and will provide reminders to avoid potential lapses.

**"With FoundationIP and the Clarivate team, I can say with a high level of confidence we are able to give clients 100% of what they want."**

**Ed Guntin**

## **The benefits of partnership**

Just as valuable is the partnership behind the product. "It's been tremendous for us," Guntin says. "With FoundationIP and the Clarivate team, I can say with a high level of confidence we are able to give clients 100% of what they want. That wasn't the case with the other IPMS vendor I have worked with. I know I can rely on Clarivate."

That reliance is a two-way street, with Guntin & Gust working closely with the Clarivate team to continually improve FoundationIP.

Guntin is more than just a FoundationIP user – he also plays an active role in collaborating with Clarivate to improve the solution as

a member of the FoundationIP Software Innovation Board. This panel brings together a cross-section of customers who engage at a product development level to discuss and suggest future product enhancements.

"When our clients give us work, they sleep well at night. They know it's going to get done correctly," Guntin says. "Our collaborative partnership with the FoundationIP team has helped us reach that level of success."

**To learn how Clarivate can help give your IP law firm a competitive advantage, contact us today.**

Contact our experts today:

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