

# Scaling for Success: Enabling an AmLaw 200 Firm to Seamlessly Manage Rapid IP Section Growth

## Buchanan, Ingersoll & Rooney P.C. expands partnership with Clarivate to increase capacity and optimize IP operations following the acquisition of boutique IP firm RatnerPrestia.

Regardless of industry, mergers and acquisitions are often less like a sprint and more like a marathon. Signing the deal is only the beginning, as the true measure of success lies with the integration work that continues across the organization long after the ink is dry.

This principle proved pivotal to the M&A strategy of AmLaw 200 firm Buchanan, Ingersoll & Rooney P.C.,

when the renowned general practice firm acquired the boutique IP practice RatnerPrestia at the start of 2024. An important step in Buchanan's strategic plan to increase resources, enhance client services, and expand relationships, the acquisition was also a significant boost to the firm's IP Section.

Combined, the two firms filed nearly 3,000 patent applications the prior year, ranking the group

among the top 10 most prolific patent filers in the United States.

The Buchanan IP Operations team knew from experience that such a rapid increase in volume would entail growing pains and logistical difficulties, but that with the support of Clarivate™, their trusted IP services partner, they could quickly scale to meet the needs of the firm.

## Navigating new integration challenges

The overall hurdle of aligning and joining two organizations with unique structures and ways of working is no small undertaking.

"Acquisitions are wonderful growth opportunities, but they're never easy, even when everything goes 100% according to plan. It's difficult to fully comprehend beforehand just how different the two firms really are," noted Buchanan's IP Operations manager. In addition to streamlining workflows, syncing data, and reorganizing staff across

the newly expanded group, the team was faced with three pressing post-merger challenges, each significant in its own right:

- Balancing significantly increased IP administration and patent docketing workloads with limited resources.
- Migrating 50+ users and IP data from the boutique firm's legacy IP Management System (IPMS) over to Buchanan's instance of FoundationIP in a short timeframe.

- Creating a consistent, unified process for IP operations that met the needs of colleagues from both organizations.

Skillfully resolving these challenges with minimized disruption to day-to-day business was central to the overall success of the integration.

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IP Operations manager

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IP Operations Manager

## A reliable partner eases the pressure

While Buchanan's IP Operations colleagues were already accustomed to routinely handling a high volume of patent filings, the acquisition of RatnerPrestia meant managing nearly 70% more applications — a strain for even the most efficient IP department.

Thankfully, the forward-thinking Buchanan team already had a model in place with Clarivate for managing their IP administration and docketing workload that could be quickly and easily scaled to handle additional volume. For the past four years, they have successfully augmented their internal team with the Clarivate IP services for docketing and paralegal work including Information Disclosure Statement (IDS) management, filing support and post-grant matters.

Expanding the beneficial relationship was immediately identified as the best solution for handling the additional workload. Clarivate quickly ramped up support for the Buchanan team with no extra work required on their behalf, nearly doubling the capacity of the team through automation and tech-enabled solutions. "We look at Clarivate as an additional in-house member. One of the best things about working together is that I can just pick up the phone or send an email saying, 'We need help.' That's what I did, and they immediately figured it out," attests the IP Operations Manager.

This highly flexible and scalable relationship came in handy yet again when a key in-house foreign matters team member unexpectedly left the firm shortly after the acquisition.

With a brief meeting to establish preferences and workflows, the Clarivate team was quickly up and running with this new component. Even though that colleague later returned, Buchanan retained the extra support, with the IP Operations Manager noting, "If we didn't have Clarivate, we would have been in a really bad situation. Now, we have a resource that can accommodate the unexpected without disrupting the in-house team, and that's very valuable."

## Proactive, detail-oriented IP expertise: A 'game changer'

Beyond scalability, it was the unparalleled service quality that made Buchanan completely confident they had made the right choice to help overcome their integration-related IP Admin challenges. "Outsourcing docketing with Clarivate has been the biggest game changer for our firm. We were hesitant at first because staffing can be hard, but it has made a huge difference in a positive way. Clarivate keeps great people fully trained and ready to go even before we need them, so that has lessened the stress," explained the IP Operations Manager, referring to the proactive nature of the partnership.

In terms of responsiveness, the Clarivate team quickly made workflow changes to meet the differing needs of newly acquired colleagues.

Despite time-zone challenges, Clarivate shortened the turnaround for Patent and Trademark Office (PTO) mail from next-day to same-day in less than two weeks. "I've never once been told no," the IP Operations Manager remarked. "Clarivate has always found a way to accommodate any request, and they do it well."

The Buchanan team also receives regular detailed reporting on the support they've received, which helps them assess effectiveness and whether they need to make any changes. "We rarely have issues with performance, and that speaks volumes," notes the IP Operations Manager, "I think working with the Clarivate IP Admin team was the least stressful part of the entire merger."

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## Streamlining IP Management

In addition to managing the volume, the Buchanan team also faced a challenge centered around the technological aspect of docketing. To ensure consistency of process, workflows, and tools, they needed to convert data and users from RatnerPrestia's legacy IP Management System (IPMS) over to their platform, FoundationIP, a Clarivate solution. Technical in nature, the IPMS migration was a new frontier for the Buchanan IPMS Administrator, with a lot riding on successfully training 50+ new colleagues and correctly mapping critical information.

The January 1st timing of the acquisition created extra pressure: "It was over the holiday season and entailed a lot of weekend work," recalled the Buchanan IPMS Administrator. "I really appreciate how the Clarivate FoundationIP team stepped up and never left us hanging. Sometimes we'd find an issue at 3 PM on a Friday, realizing that if we didn't address it ASAP, our dockets wouldn't run correctly on Monday. Clarivate colleagues were accommodating about working after hours and making sure we got critical work done ahead of deadlines."

Working toward the goal of a smooth IPMS transition for the start of 2024, the Buchanan team also benefited from dedicated instruction from Clarivate colleagues that was tailored to their level of understanding and in an accessible format, enabling them to make progress and keep the migration on schedule. "It was great to have someone we could contact directly for help when we exhausted the other resources, who intuited the type of support we needed, meeting us at our level," noted the Buchanan IPMS Administrator.

When the team faced challenges reproducing reports originating from the legacy system, they were able to meet one-on-one with a Clarivate expert and get the guidance they needed: "Often, we got 90% of the way there on our own, and would reach out for help troubleshooting, which saved us on more than one occasion," recalled the IPMS Administrator. This extra support helped ensure that RatnerPrestia colleagues continued to receive the same information they were accustomed to, despite the transition.

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Buchanan IPMS Administrator

## Setting up for success

Ultimately, the support that the Buchanan IP Operations team received from Clarivate, both for additional administrative assistance and IPMS support, was instrumental in helping to ensure that the integration work went smoothly. Having a reliable and trusted partner in place to quickly and seamlessly scale IP operations reflects Buchanan's overall ethos of embracing teamwork and

forward-thinking creativity to knock down barriers, drive competitive advantage and achieve results. Buchanan is now well equipped with a tried-and-true model for handling the impact of future growth opportunities, with the firm's IP Operations manager summing it up well: "As a firm, we're committed to staying ahead of the curve, and Clarivate helps keep us on the cutting edge."

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