

HOW TO BUILD AN AUTOMATED INTELLECTUAL PROPERTY PRACTICE

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Session C10

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LIFE AT AN ‘IP’ FIRM



- Nature of Practice
- Value of Technology
- Basic Tools
- Management Tools
- Integration Tools

Evaluation by **K.R.O.N.O.S.**

Not the Greek God

- **K**eystroke Count
- **R**eturn on Investment
- **O**pulence and Intuitiveness
- **N**etworkability and Integration
- **O**ptions and Customization
- **S**uitability for the Task

Evaluation by K.R.O.N.O.S.

Keystroke Count

- It must be easy to use
- Subjective judgment reduced to an empirical keystroke count
 - In comparing similar tools, count the number of keystrokes (or mouse clicks) require to accomplish regular tasks
 - The fewer the keystrokes, the better designed the software, and the more likely it will be used properly.

Evaluation by K.R.O.N.O.S.

Return on Investment

- It must pay for itself in:
 - increased productivity,
 - improved work product,
 - greater client satisfaction,
 - more efficient organization
 - greater information retention
- Don't just look at price per seat!
- “Total cost of ownership” vs. expected ROI
 - equipment requirements
 - training, support and customization

Evaluation by K.R.O.N.O.S.

Opulence and Intuitiveness

- It must be "good looking"
- Ugly interface as proxy for poorly designed software
 - Indicative of thrown together software
 - If developer did not take the time to build an elegant and appealing interface, developer may also not have taken the time to fully test and debug the software.
- Icons, menus, and screens must be intuitive
 - Cost of extensive training
 - Failure of users to fully realize potential of the software.

Evaluation by K.R.O.N.O.S.

Networkability and Integration

- The P.C. is dead. Long live the NetPC
- Software must function in a networked environment
- Software must allow multiple users to access the system simultaneously
- Software should be able to communicate with other programs, sharing and exchanging data
- Software should be ODBC compliant

Evaluation by K.R.O.N.O.S.

Options and Customization

- It should be easy to install software
 - Single CD-ROM or single file download
 - Menu of configuration options
- It should be easy to personalize the software
 - Each IP practice is unique
 - Support for custom fields
 - Ability to modify or add new forms and templates
 - Ability to generate custom reports

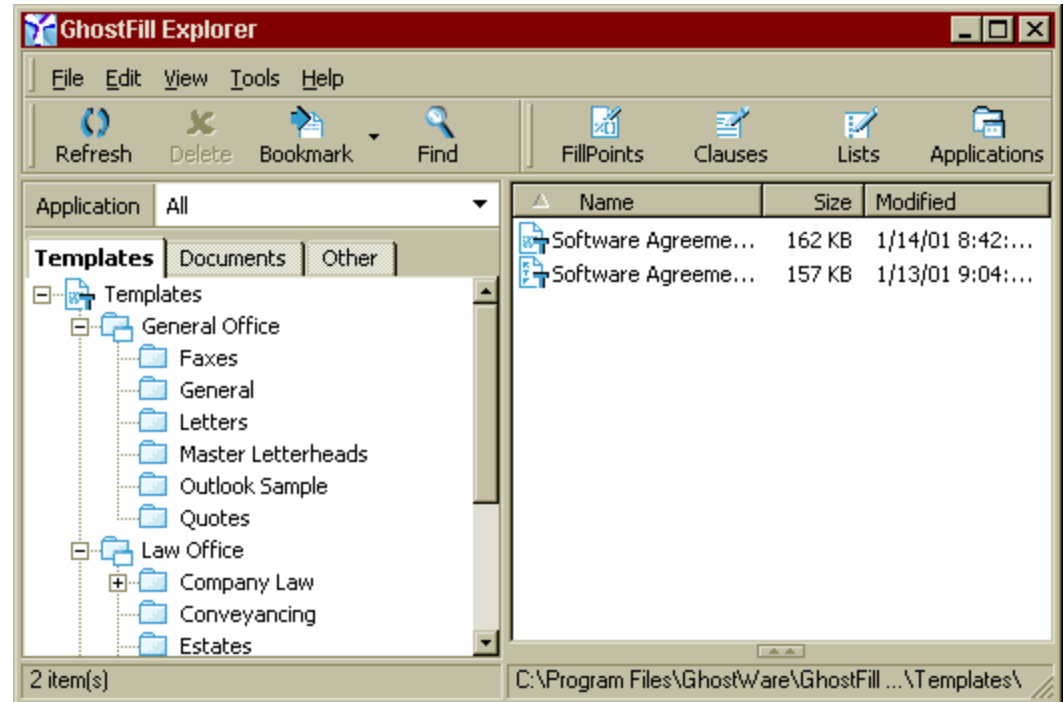
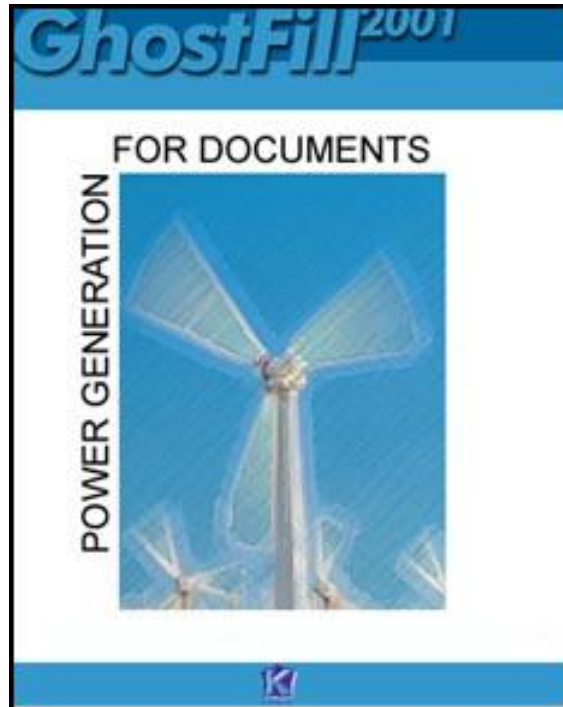
Evaluation by **K.R.O.N.O.S.**

Suitability for the Task

- The tool must be designed for or configurable for the specific use desired by the practitioner.
- A general purpose case manager is a poor substitute for an IP portfolio database.

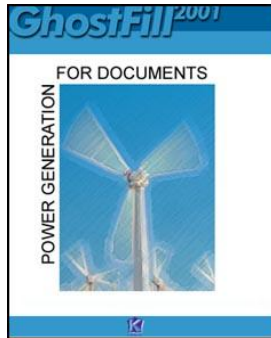
Evaluation by K.R.O.N.O.S.

Application to GhostFill Document Assembly Software



Evaluation by K.R.O.N.O.S.

Application to GhostFill Document Assembly Software



Launch GhostFill



Markup Wizard



FillPoint Editor



Task Editor



Database Connector

Evaluation by **K.R.O.N.O.S.**

Application to GhostFill Document Assembly Software

- K = Limited keystrokes
- R = Rapid return on investment
- O = Royal blues and elegant interface
- N = Designed for the network, integrates with any database, runs over the internet
- O = Multiple options, perhaps too many
- S = Suitable for high-speed document drafting

Tools for the IP Practitioner

Categories of Tools

- IP Portfolio Management
- Intellectual Property Exchanges
- Document Assembly (PC and Network)
- Document Assembly (Web-tools and ASPs)
- Forms and Intelligent Forms
- Web-Based Forms (Intelligent and Static)
- Web-Based Resources

Tools for the IP Practitioner

IP Portfolio Management

- Geared for corporate IP departments
- Optimized to handle management of IP
- Used to track patent, trademark and license portfolios
- Check whether support divisional or client specific portfolios
- Check whether data accessible over the internet
- Check for links to document assembly and form-filling programs

Tools for the IP Practitioner

Intellectual Property Exchanges

- Web-based intellectual property exchanges that are designed to facilitate communication between sellers of IP and potential buyers.
- Geared to counselor as VP Business Development
- Networks can be used to assist clients in marketing a technology for which you have secured patent protection
- Exchanges can be used to evaluate the competitive market to supplement research of infringing or overlapping patents
- Check whether “exchange” is simply an internet portal to licensing organizations or a true neutral forums that assists sellers to find buyers and vice-versa.

Tools for the IP Practitioner

Document Assembly (PC and Network)

- Document assembly tools have the potential to transform an IP practice, dramatically increasing productivity
- Combined with value billing, substantial investment in these tools can be recovered quickly
- These tools enable the IP practitioner to leverage his/her knowledge and become more productive
- Largest cost in working with these tools is “attorney time” and consultants. These costs also make the systems built more powerful and cost effective.

Tools for the IP Practitioner

Document Assembly (PC and Network)

- A word of caution. Beware of ...
 - Clunkers supported by single programmers
 - Programs that lack a reseller and consultant network
 - Programs with a steep learning curve
 - Programs that have limited compatibility with the word processing programs you use
 - Programs that cannot talk to your case management programs or your electronic address book
 - Legacy DOS programs with a “Windows veneer”, that may no longer be supported
 - Programs that require costly upgrades to access over the Web

Tools for the IP Practitioner

Document Assembly (Web-tools and ASPs)

- Need to access your templates from the road or wish to sell your expertise over the web
- The tools project the “interviews” or “dialogs” over the internet/intranet and then produce a custom document
 - RTF = Rich Text Format (Word and WordPerfect)
 - PDF = Portable Document Format
 - HTML = Hypertext Markup Language
- Most programs allow authoring of the templates on the desktop. Files are then posted directly to the web server or need to be actually converted before posting
- GhostFill and HotDocs use MS Word as the editor
- SmartWords, RapiDocs & SpeedLegal use proprietary editors

Tools for the IP Practitioner

Document Assembly (Web-tools and ASPs)

- ASPs
 - May offer free coding in exchange for rights in content
 - Volume usage commitments
 - E-commerce solutions with ASP hosting
 - Referrals and royalties
 - Marketing opportunity

Tools for the IP Practitioner

Forms and Intelligent Forms

- Few collections of forms for IP professionals
- Most collections geared to consumer and small business market
- Generally sold on disk, but may be distributed by download
- Buyer beware!
 - Look carefully at the offerings and the description of what you are buying, and who authored the documents
 - Try to get an evaluation period so you can return the package if you don't like it
 - Intelligent forms are preferable to wordprocessor forms
 - Collection should allow you to copy templates and revise them to suit your requirements.

Tools for the IP Practitioner

Web-Based Forms

- Brand new category with a lot of activity
 - New portals opening every day
 - Forms collections doubling every few weeks
 - Mass advertising and promotion
- Problems in Paradise
 - Little quality control or branding for these forms
 - Use them at your risk.
- What to look for in a form's portal
 - Real agreements, ... not forms
 - Authored and annotated forms
 - Intelligent forms

Tools for the IP Practitioner

Web-Based Resources

- Associations for IP professionals
 - American Bar Associate
 - Licensing Executives Society
 - AIPLA
- Referral Networks
 - AmeriCounsel.com
 - LegalAdviceLine.com
 - Prepaid Legal Services Inc.

IP Practice of the Future

Law on the Web – Intellectual Property Practice Area



- Expert practice systems developed by the leading experts in the field
- Expertise available in a few keystrokes

Question & Answer

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