

Kelly Theodosiou, Intellectual Property Support Team Lead at Fasken Martineau DuMoulin LLP, is the ideal person when it comes to advice on extracting the most value from IP management software PATTSY WAVE®. Since beginning her career, Kelly has become a PATTSY WAVE subject matter expert and leader in training and implementing the platform, having used it at four different law firms. Now, she sits down with Anaqua to discuss the evolution of her role and how she applied and monetized the platform to each law firm's specific use case.

Please tell us about your career history.

For almost 20 years, I have continued to grow in my role as a Legal Assistant, starting out by covering various practice groups, including Intellectual Property (IP) and working in other areas to gain experience. After moving to IP full time, I evolved rapidly from trainee to trainer, implementing best practices, providing technology advice, and driving efficiencies along the way.

Within a couple of months of moving to IP full time, I became the PATTSY expert to discuss workflows, processes and provide training at McCarthy Tétrault LLP. From there, along with two lawyers, I helped to start a new IP group at a boutique firm, as Senior Law Clerk, and managed all aspects of this division, including the setup of PATTSY and management of data transfers. Now, as the Intellectual Property Support Team Lead at Fasken, I lead the Toronto office's IP prosecution support team and manage PATTSY WAVE for the firm nationally, including programming, training and implementation of processes and workflows.

Please outline one common challenge docketing teams face.

Docketing can be monotonous, making it hard to find people, with a fine attention to detail, and a struggle to keep them engaged. We have altered our docketing role precisely because of this. Now, our staff have other tasks, allowing them to become more familiar with IP and to better understand the timeline and process of patents and trademarks.

With IP under your belt, and the management of extensive deadlines that come with it, you can go into many different fields. We're giving our staff the tools to grow within the



department and the tools to make sure we are doing things the best way they can be done.

How is your docketing team at Fasken structured?

At Fasken, we have centralized docketing, and our docketing teams manage the legal and statutory deadlines in PATTSY WAVE, while the assistants and practitioners on the files are responsible for the other upkeep (such as reminders).

Our Toronto docketing team is also structured to take on more than just docketing and handles basic prosecution reporting letters, among other administration. We have enabled our docketing teams by providing detailed and intensive training on all processes and workflows and, of course, PATTSY WAVE.

How has PATTSY WAVE helped your team?

PATTSY WAVE has been the best tool for our team to get to where we need to be. Back about 13 years ago, in a

transition from one firm to another, we had to temporarily use a massive Excel spreadsheet to manage all matters and deadlines for a few months and I can't tell you how excited I was to have PATTSY again, which made it so much easier for us to consolidate everything on one platform and really took the stress off my shoulders for deadline management.

Since joining Fasken, my role has evolved and I have overhauled the way we use PATTSY WAVE and how the IP prosecution practice is operating as a whole. My first area of focus was on efficiency because we still weren't using PATTSY WAVE to its full potential and there were some gaps in the workflow processes. We took measures to identify all those gaps and see where we could use the tools we had to enhance our processes.

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For example, we did a deep clean and implemented data integrity and cross-referencing review processes. People were using basic tools but not inputting essential data. Now, this isn't a problem. With the clean-up done, we are utilizing new features and overhauling the way we docket.

As a docketing tool, PATTSY WAVE works efficiently and effectively when used the way it is intended, allowing it to achieve its full potential, rather than just a tickler system. In our case, when I joined Fasken, I found the system was over configured for what we needed and was causing inefficiencies. Of course, we had to make sure measures and reminders were in place to account for all the activity, but there is a fine line between sufficient and too much.

To support the volume, we are switching to a hard reminder system and Michael Frechtman, Senior Director of Sales and Accounts at Anaqua, has been very supportive of my

platform needs for the firm. So I'm very excited about this change and how it will simplify the way we docket. I am also very excited about the changes in Version 6.0, including the interactive docket and instructions capability, which will make our systems all around cleaner and more precise.

What advice would you give those looking to invest in the PATTSY WAVE software?

First, I encourage people to use the system as is without too much additional configuration. With PATTSY WAVE, you want to introduce the system, and keep it clean and concise. You know the saying "less is more." Use the resources you have, instead of adding more bulk to the software. By using the features that come with PATTSY—including data validation, docket scheduler, interactive docket, batch letters, quick reports, linking families and matters—we have saved a lot of time and resources.

The data validation is probably my favorite feature as data integrity is the biggest key for IP. I wish there was an AutoDocket and Download tool for Canada, like the U.S., but I am excited about new features that are coming up.

Second, data entry needs to be completed as much as possible, using all fields and information. The result is that in the future, you only need to go to one source for what you need.

As part of this, training is absolutely crucial. PATTSY WAVE should be the first place you go to for data, but staff need to be trained to attach the pertinent information. You don't want to have to go to 20 different sources to find data. With so many people working from home, this is paramount.