

Heather Salamone, Intellectual Property Legal / Docket Administrator at Barley Snyder, is a driving force behind the IP Practice Group's journey to constantly improve the firm's IP operations. Starting back in 2008, she led the way in moving the firm from paper to electronic docketing processes and then paved the way for other practice groups on their paperless journey. She hasn't stopped there, Heather is constantly analyzing how to make the firm's IP operations as efficient as possible, and has leveraged automation features in IP docketing software, PATTSY WAVE® to achieve her team's operation goals.

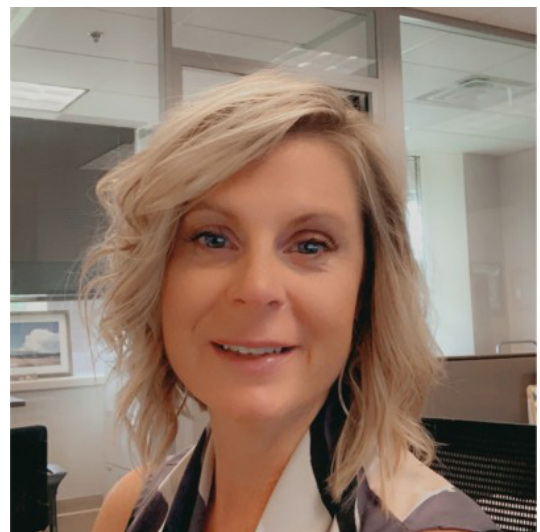
Please tell us about your career history and your current team.

I've been working in the Intellectual Property law field for more than 28 years and have gained a wealth of knowledge in all aspects of patent and trademark prosecution. As an integral member of the Intellectual Property (IP) Practice Group at Barley Snyder, I assist the attorneys with all aspects of patent and trademark prosecution and docket management. Our Malvern, Pennsylvania office is solely focused on Intellectual Property with nine full-time employees, staff and attorneys. Three of us run the docketing team and PATTSY WAVE is a vital tool in our process.

How has your docketing team changed over time?

Our practice group has been fully electronic since 2008. Back then, it was just me, the managing partner and one other partner, along with a filing room full of files. At the time, the US Patent and Trademark Office (USPTO) had introduced private Patent Application Information Retrieval (PAIR) and electronic filing, and our managing partner wanted to figure out how we could utilize this. We began the process with patents. At first, we thought about going back and scanning all our old files to put them into the system. We quickly realized this was going to be incredibly time consuming. We decided instead to select a date and utilized the electronic files as the main file from that point forward. Once we had the process down for the patent files, we rolled it out to the trademark, copyright and litigation files.

When we made this change, we reviewed and implemented many process improvements to design a group that could work from any location. We focused on developing



processes that would assist our group to manage our workload and work remotely if needed. Our IP Practice Group then helped other practice groups across the firm to adapt and move to electronic processes.

How do you maintain a culture of improvement?

I've talked to many people who are making the move to fully electronic, so I know it's vital to get the team together and decide on a procedure and workflow. It's about process, not perfection. We want to have a great product but we need a great process in it too.

Having the support of the management team is key to maintaining a culture of improvement and we have forward-thinking leadership at Barley Snyder. It's also vital to have backing throughout the firm. We have practice group meetings where attorneys meet and discuss things that aren't working. The docketing team is part of these meetings and we talk about how to improve things on both

a staff level and attorney level.

We're always trying to improve on our processes—our motto is Practice Excellence®. We also know you can't avoid hiccups. When something gets missed, we ask where it went wrong and can we automate the process? Honestly, I used to be resistant to change. But I've evolved over time and now I look at every process and ask, "Is there a better way to do this?" Whether we can automate is one of the things our practice group leader is always asking. We're not automating in a way that one of us will lose a job, but in a way to make the process smoother. Ultimately, improving our processes ensures we can help make our client's jobs easier.

How has PATTSY WAVE helped your team?

When COVID-19 hit, our practice group was able to move to a remote work environment seamlessly. We realized that we could find ways to utilize all of our technology, especially PATTSY WAVE, to assist in the transition, particularly with utilizing the AutoDocket & Download® feature for both patent and trademarks.

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Overall, we love the automation that PATTSY WAVE provides, especially AutoDocket & Download. We also use the docket schedule to run and distribute weekly dockets. The USPTO data tab is a great tool for us, especially after recently acquiring a client from another firm that was still using paper files. All of these files were transferred to us in paper format meaning that we received 65 boxes filled with large legal-sized files! Thankfully, we were able to utilize PATTSY WAVE's Data Validation tool to review accuracy in both the patent and trademark files we manually entered.

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

Think about how you want the software to look and what you want to use it for. For example, we weren't using letter generation until recently. We always had it but didn't use it. You need to look at all the features PATTSY WAVE has to offer and how you can use it in your team, rather than just having a basic docketing system.

Look out for webinars on how other firms are using PATTSY WAVE and absorb that knowledge and regularly look to refresh your knowledge on the system. I took part in the webinar "Docketing in the Era of Efficiency and Transformation" late last year, which explored the best practices of IP operations teams. The panelists have all kept in touch and we regularly collaborate—one of the other panelists has given me advice on using the PATTSY WAVE Letter Generator, something we'd not used prior to six months ago.

Overall, I'd say that you shouldn't be afraid to ask for advice from others outside the firm, whether that's from colleagues in other firms or the PATTSY WAVE team. We love to learn from others, and these experiences help us continually improve our docketing processes.

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