

CASE STUDY

Texas IP Law Firm Uses Anaqua to Docket and Improve Client Satisfaction

PROFILE

Garlick & Markison, LLP is a Texas-based IP law firm focused on strategic patent portfolio development building for its clients. The firm, which was founded by senior licensed patent attorneys Bruce E. Garlick and Timothy W. Markison, assists clients in building and monetizing ongoing intellectual property and patent harvesting programs resulting in superior market positioning and increased valuation.

Speaking at the 2018 Anaqua User Conference, Bruce Garlick, co-founder and Managing Partner of the firm, discussed how Anaqua's IP management system has advanced their IP practice into the 21st century.

The seamless IP management system has allowed the firm to docket the patenting process more efficient and accurately than ever before.

Challenges

Like most firms that have been around for decades, Garlick & Markison had an old database. It was a custom database that a partner at the firm created with a billing component. Because the firm built it themselves, it was tough to modify, so they decided to make a change.

"We then made a move to another IP management system, but then had trouble migrating," Bruce Garlick remembers.

"That led us to Anaqua, which we found was very easy to migrate our database to and could help us with all of our IP needs."

Docketing: One of the main reasons G&M needed a new, advanced IP management system was for docketing. The task of docketing is crucial for the firm. It handles thousands of patent applications at a time and each patent application can take years to make its way through the United States Patent Office (USPO) system and be awarded a patent. Without an IP management software system, it can be impossible for the firm to organize the patent application process for thousands of patents for various clients.

As a patent application makes its way through the approval process, called patent prosecution, G&M has many filing deadlines, documents, forms, drawings and statements to that needed to be tracked.

ANAQUA's patent docketing ensures that all for the crucial deadlines for firm's clients are met and all documents are labelled and kept in the correct file, so they can be retrieved when required.

Paperwork: The patent application process also generates a great deal of paperwork for the firm. Patent docketing includes entering each document into a database so attorneys can easily call up a list of all documents in the application file and any dates associated with each document. G&M selected ANAQUA to handle all of these tasks in a paperless system. ANAQUA's docketing database can scan copies of documents, create templates and forward documents to other law firms as required.

Solutions

Docketing: G&M primarily uses ANAQUA as a docketing system. The firm requires its attorneys to keep a backup docket for security purposes, which is cross referenced twice a month to the data in ANAQUA.

“We have Anaqua host it so that we can have access to it across all of our locations across the country and it allows us to have admin support to be spread out, yet centrally accessible,” said Bruce Garlick.

ANAQUA also helps the law firm track priority claims effectively. Its mapping feature helps the structure of the firm’s workflows. Beyond that, it serves as a solid system to docket the patent prosecution process.

Reports + Workflows: ANAQUA provides attorneys and paralegals at G&M with a customization ability where they can create reports for clients that are specific to the actual clients.

“Our clients have different needs, and ANAQUA is very good at creating custom formats,” said Bruce Garlick. “We now use the software every day to create records, track filings and responses. Multiple times a week, our staff creates workflows that are required to be serviced.”

Results

The entire staff at Garlick & Markison are happy with the ANAQUA system and it has even left a lasting impression on its clients too.

WITH ANAQUA:

- Garlick & Markison can docket quicker and more effectively, saving time and money.
- Garlick & Markison can track the day-to-day workflows of all of its attorneys, no matter which office they work out of, enhancing collaboration and communication.
- Garlick & Markison can build unique reports that cater to their specific client’s needs, improving customer satisfaction.

“Anaqua is becoming an industry standard,” said Bruce Garlick. “Many of our clients migrated to Anaqua after we did. When asked, we tell others in the industry that it’s the best IP management system out there”

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