

CLIENT SPOTLIGHT

How Stinson Gets Ahead of Deadlines with PATTSY WAVE

Stephen C. Hall, IP Administrator at Stinson LLP, shares his extensive experience of working with PATTSY WAVE® – IP docketing software and Anaqua Services. He is based in Kansas City, Missouri. His team leans on PATTSY WAVE to help take care of all their docketing needs.

What are the current challenges faced by IP law firms?

SH: The first one is current economic challenges. Despite economic difficulties, our goal is to be on the front lines, whether by offering competitive rates or providing additional support. Being a full-service law firm, we often work across several practice areas with our clients to cover all their needs.

Another challenge is that there's an increase in companies pushing to bring more IP activities in-house. Due to economic challenges, some businesses try to reduce those costs and legal fees. That's definitely a challenge for clients who do not have the expertise in-house to handle the issues. They have relied on us to do the work and make them aware of issues, but now they need to do that themselves.

It's great that organizations understand their portfolio, deadlines, and data better now, which will improve collaboration between their team and the external law firm. However, we still encourage engaging with an external firm that has expertise in managing IP activities.

Our clients are also increasingly conscious of AI-driven changes and seek cost-effective automated solutions to reduce overhead. However, introducing automation and AI technologies into the legal field faces inherent challenges because of established practice methods. But positively, at our firm, we have been able to implement automation and provide cost-effective solutions to our clients.



Can you talk about your role and how your team is structured?

SH: As an IP Administrator, I lead our administrative support across our IP practices. I help our IP practice division leaders manage administrative support from our attorneys. Essentially, if there is an IP problem, it comes to me.

Our support team has ten IP paralegals across our patent and trademark practices, three internal IP docketing team members, twelve IP legal assistants, four patent agents, and one technical drawer. We mostly do things in-house, as it helps us provide competitive flat fee arrangements and deliver services quickly. In my role, I partner with Anaqua to push forward key initiatives to streamline our IP operations. We use PATTSY WAVE with Anaqua's Services to manage our day-to-day docketing efforts and support our clients.

Is IP budgeting an important area for you? How can Global IP Estimator help you in gaining a better understanding of IP costs?

SH: Certainly, IP budgeting and having a comprehensive understanding of IP costs help our clients better strategize their IP portfolio to remain competitive. With the knowledge of IP costs under different filing scenarios, we can share those options with clients, "Here's one scenario in which you could pay X amount, but here's another one where you can pay a much smaller amount and still get the same benefits and coverage."

For instance, when filing a trademark in 16 jurisdictions, including 14 European states, using a Madrid application compared to other routes can significantly reduce the cost and effort. Providing different scenarios to our clients with a budget and outlook helps them make informed decisions, saving time and money.

Without a budgeting tool like Global IP Estimator, getting that level of detailed cost and timeline estimates for foreign filing is a very labor-intensive process. It takes a lot more time to research and seek out associates in those specific areas. We need to wait for updates from associates, respond back to them, and then relay the information to the clients.

Global IP Estimator helps us reduce all that legwork to just 10-20 minutes and decrease the lag time of getting an estimate from an associate by at least 12 hours.

What are the key areas that PATTSY WAVE is supporting your team?

PATTSY WAVE is our one and only IP docketing solution. We utilize all three modules. We use the general trademark and the patent modules to house all our IP deadlines, including litigation cases, IPRs, and various IP-related matters that arise. PATTSY WAVE takes care of everything we need and provides great comfort to our team. For instance, when we enter a deadline, we can add the specific nature of that deadline, and it goes to the dockets of the people responsible for that deadline.

Another benefit is the automated weekly and monthly docket reports from PATTSY WAVE. The report provides call-ups and deadlines that we need to be aware of. This gives us the confidence to say, "Oh, we have a renewal deadline in five months, and we haven't sent anything to the client yet. It's time to reach out."

Can you share any best practices on how to use PATTSY WAVE to create efficient IP processes?

SH: Yes, managing intellectual property tends to be a volume-intensive practice for any law firm. Our clients, having a portfolio of several hundred trademarks and patents, typically face multiple deadlines. So, we want to avoid getting congested at any time with several deadlines on a specific day, week, or month. The quicker you can get ahead of those deadlines, the better you can serve your clients with a more balanced workload.

Two of the capabilities in PATTSY WAVE that help us stay on top of deadlines, mitigate any risk, and provide comfort for us as well as to the clients are Docket Schedule and Call-Up features.

Docket Schedule sends out weekly and monthly docket reports along with schedules of upcoming deadlines. This helps us to be on top of deadlines promptly, reduce manual administrative tasks, and streamline IP docketing reporting.

When you run the regular docket report, you can use the Call-Up feature to get all your deadlines within a specified date range. Having that level of reminders and information available to us, which can be quickly shared with the clients, provides us with a safety net to move forward.

Are there some new functionalities in PATTSY WAVE that you're looking at exploring?

I'm very excited about the new features in PATTSY WAVE 7.2, such as the integration of analytics from AcclaimIP. It's incredibly important to have data-backed information about resources on examiners, prior art, and decision-making. That information from

PATTSY WAVE helps us remain competitive since we can provide a comprehensive and easy-to-understand opinion validated by data back to our clients. During the decision-making process, we can better communicate our opinions, "This is the way that we recommend you proceed. Or if you do go this way, these are the risks involved."

How has your experience been with the Anaqua team over the past nine years on PATTSY WAVE?

I've always had a positive experience working with PATTSY WAVE, its support team, and people like Gina Gibbons, our Client Success director at Anaqua. Whenever I have a question, it's answered very quickly. The support and the resources are available quicker than expected. That makes a huge difference.

As the manager of our IP admin staff, I firmly advocate that everyone should have training on PATTSY WAVE by Anaqua's internal trainers, even though I can train

them well. Your team has done a great job assisting and onboarding our new hires and new people to IP.

How do you see managing IP has changed in the last few years?

Managing IP has certainly changed. Most of the changes in our IP practice, such as how we manage information, deadlines, and intake emails and letters, are driven by the Patent and Trademark offices of various countries.

PTO offices are increasingly recognizing the importance of technology in raising their standards and are driving the transition to more automated IP solutions. For instance, they have recently implemented an electronic format for delivering trademark registrations, patents, and letters. This shift offers multiple advantages, such as reducing paper usage, getting deadlines on the docket faster through email, and easing communication between our docketing team, paralegals, and clients.

We can drive change as much as we want with internal changes and automation across different processes. However, without the accompanying changes at the PTO level across countries, it's just us increasing things by about 10%. When we synchronize our improvements with PTO offices, we can substantially enhance overall productivity. It's a collaborative journey towards a more efficient and technology-driven future in IP management.

About Stinson LLP

Stinson LLP is a full-service law firm with 450 attorneys in 13 offices across the USA. With large IP practices in three offices: Kansas City, St. Louis, and Minneapolis, the law firm strives to create a unique experience for clients in the IP industry. Stinson LLP takes pride in its collaborative approach, lasting relationships, and unique perspectives. At Stinson, they combine industry knowledge and business acumen to deliver practical legal guidance to clients

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