

CLIENT SPOTLIGHT

Hoxie & Associates Client Spotlight

Building a Platform for Collaboration and Growth

Hoxie & Associates, a boutique IP firm specializing in chemical technologies, wanted to give clients a portal to manage their cases and interact with the firm. Together with Anaqua, the law firm built a robust platform on AQX® Law Firm that automates docketing and reporting functions, as well as facilitates requests for common agreements and communications.

We recently spoke with Michele Hoxie, Docketing Paralegal at Hoxie about how Anaqua and the firm have bolstered remote collaboration for their team and clients. Michele started her career in IP part-time job at a small law firm in Millburn. She moved on to Colgate-Palmolive working in their patent department, where she learned about prosecution and docketing in depth, then moved on to drafting and managing requests for common agreements. She retired from Colgate two weeks before everything shut down for the pandemic, and started at Hoxie.

Can you tell us about your firm?

As a boutique IP firm, we can give our clients a lot of individualized attention. Our focus is to make things easy for our client.

Our founder and my husband, Tom Hoxie, was Chief Patent Counsel for Novartis US. We have a lot of small start-up companies we work with such as small pharmaceutical companies developing new products, including vaccines. It's very exciting work, to be involved with our clients and see them grow. Something that sets us apart is that our clients can access their records in the Client Portal we developed with Anaqua.

What does your team look like now?

When I joined, the firm didn't have a dedicated docketing person. Then the pandemic shut everything down, and I had to figure it all out, with the help of people at Anaqua.

Right now, we have five permanent paralegals, and we just hired someone else on a temporary basis. We work with seven attorneys and one patent agent.

What are some current challenges for your team?

There's a lot of information that can get lost if you don't have a system to capture it all and make sure it is all correct. Emails are one way of capturing information. But email isn't sufficient. Our attorneys can get 100 emails a day.



Bringing people on who don't necessarily have much docketing experience, or who didn't know prosecution, can be challenging. It helps if you know how the prosecution flows and works. Anaqua's mail integration for UPSTO and PCT matters saves time not having to drag the mail into each matter, and the automatic docketing is great! I love it because it's a double check for me and helps me feel confident the data is correct. It docket and drags our mail in. I then go into each record, and make sure everything is correct. Automated docketing saves us so much time.

How did the client portal come about?

Tom always wanted clients to be able to go in and run their own reports of the patents they have. We're happy to do it for them; however, I think, it gives them some control over everything, to be able to go in and just

see everything that they have and download what they need. Clients can look at individual matters as well as their entire portfolio.

I also created reporting templates. It was important that paralegals be able to generate reports directly from the docketing system, to be in the matter and then report out of the system. And no one at the firm had ever done that, so I learned the coding. Now we have a lot of templates, and it's just so much quicker.

We were looking for a way to collect and sort all the relevant data for our clients like a questionnaire and help us respond to client requests more effectively. We wanted to configure the AQX® Law Firm Client Portal to help us with this and include common agreements, too. I knew the information that we would be looking for, and our vision was to create an agreement request survey.

When the client goes in, if they want to request an agreement, they just answer all these questions for us, submit it, and then it automatically creates the record in the Agreements Module in AQX. Now we have it programmed where our main file box is copied, Tom is copied, and a paralegal is copied. We don't want to miss anything, and the Client Portal helps us ensure this.

How do you see the Client Portal helping your firm?

If the client is asking for a type of IP-related agreement, and the attorneys are drafting the cases, they can see when a client is requesting an agreement. The Anaqua Client Portal captures this information, and then we can guide our clients.

At the bottom of the agreement request form, we have a list of basic agreements and an explanation about them. The client has a guideline. And the attorneys also follow-up with the clients.

We also have an invention record survey on the Client Portal, so clients can submit information about

their inventions and the attorneys can draft patent applications. The invention record section of the client portal is important because we have a record of the date of the invention, and who the inventors are, and they can attach documents. And we recently launched a trademark survey, to capture requests for trademark applications.

How's your experience been with the Anaqua team?

Everybody's been really helpful and responsive from Anaqua's Client Success team to IT. I had a lot of questions when I was starting during the pandemic. I thought it would be nice if I could connect with someone at another law firm, maybe a bigger law firm that had been working with Anaqua for a while, just to get some tips and run things past them.

Joe Bichanich, Client Director from Anaqua connected me with another Anaqua Client from a larger firm. He introduced us via email, and she gave me suggestions for Outlook integration. I now use Outlook integration, and it's been a lifesaver for us.

What would you recommend to someone who's just starting out in AQX Law Firm?

The buddy system is great. Working closely with people at Anaqua and clients using AQX Law Firm today who can mentor you on the system. It's helpful to get to know other clients who are using the software and share experiences.

My paralegals know how much I love to talk about Anaqua. It's a great, powerful system. And we're really proud of the Client Portal that we've built with the Anaqua team.

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