

# MADE IN CANADA

Sophisticated software systems can help law firms manage their IP with the minimum of risk, offering significant reductions on liability insurance. **Rob MacDonald**,



partner and professional service leader at Gowlings Lafleur Henderson LLP, explains how using CPA Inprotech has contributed to a significant saving on its professional liability insurance coverage

**G**owlings Lafleur Henderson LLP is one of the longest-running and largest law firms in Canada. For Rob MacDonald, IP is part of the firm's history and heritage, and it prides itself on being able to provide a full service to its clients.

Handling in excess of 100,000 live patent and trademark records at any one time, the firm's software is part and parcel of helping it protect and continue to build upon its reputation in the growing IP industry. As Rob explains: 'Practising IP law with Gowlings for over 23 years, I know first-hand how important it is to find a way to automate the process of handling a rapidly escalating number of IP



records. In the late 1980s we used Custodian, but by the late 1990s and with thousands of registrations in the system, we found that the package no longer fulfilled our needs.

'We needed a system that would facilitate the daily despatch of huge batches of correspondence, that would accommodate the requests of our clients in terms of the handling of their accounts, and that would incorporate changes in law updates. CPA Inprotech was the only package that fully met our needs, and – true to our reputation for innovation – we became the first North American company to install the system. The level of service we can now offer has risen accordingly.'



JON DAWSON/LOONEY PLANET IMAGES

Not only has the software enhanced the firm's internal productivity, it also ensures that the firm's transactions are carried out with the minimum of risk. 'As we discovered when applying for updated liability insurance, underwriters have never been as concerned with the risks that law firms present – and this includes the field of IP,' says Rob. 'We manage a huge number of records and it is imperative that we do so without error. Since installing CPA Inprotech and customising it to our own needs, we are more secure in the knowledge that our transactions are run with the minimum of risk. This is great news for our clients and for our business; we have found that if you can actively illustrate how you

'IF YOU CAN ACTIVELY ILLUSTRATE HOW YOU CAN REDUCE YOUR RISKS, IT CAN MAKE A CONSIDERABLE DIFFERENCE TO LIABILITY INSURANCE. AS PART OF OUR AGGRESSIVE RISK MANAGEMENT PROGRAMME, THE USE OF CPA INPROTECH HAS CONTRIBUTED TO A SIGNIFICANT SAVING ON OUR PROFESSIONAL LIABILITY INSURANCE.'

can reduce your risks, it can make a considerable difference to liability insurance. As part of our aggressive risk management programme, the use of CPA Inprotech has contributed to a significant saving on our professional liability insurance.'

### Providing a secure service

CPA Inprotech allows the firm to safely transfer documents and records to its clients via the Gowlings Extranet. 'This facility has been of real benefit to both our existing and potential clients,' says Rob. 'Many larger clients take this for granted as they already have similar systems in existence, but the smaller companies really welcome the opportunity to centralise their information and to keep it updated in a more sophisticated and systematic fashion.'

**'OVER 300 PEOPLE NOW HAVE ACCESS TO THE SOFTWARE, WITH AN AVERAGE OF 140 PEOPLE LOGGED ON TO THE SYSTEM AT ANY ONE TIME. WE HAVE PRIORITISED ACCESS RIGHTS, MEANING THAT ONLY OUR 52 TRAINED DATA STAFF HAVE FULL UPDATE RIGHTS, AND ONLY WITHIN THEIR OWN OFFICE.'**

We can now create new deadlines quickly; set up standing instructions for client deadlines; generate reminders and letters which merge with data entry; transfer information between CPA Inprotech and our accounting system; and e-file trademark applications by scanning images directly into the software. Essentially, if a client specifies that they only want to receive one reminder for an Official Action deadline, we can set that up without having to interfere with the thousands of other cases in our system.'

### In-house productivity

'The feedback internally has also been very positive,' adds Rob. 'After initial adjustments, our department is finding it much easier to use, helping everyone to better manage their time and the service they provide. It allows us to enter deadlines quickly and the system is able to calculate for itself when letters need to be sent out automatically.'

'Over 300 people now have access to the software, with an average of 140 people logged on to the system at any one time. We have prioritised access rights, meaning that only

**'WE ALSO NEED TO PROVIDE RESOURCES FOR BOTH FRENCH- AND ENGLISH-SPEAKING NATIONALS. OUR NEXT STEP WILL BE TO LOOK AT THE CPA INPROTECH WORKBENCH MODULE, WHICH WILL ALLOW US TO INPUT AND ACCESS INFORMATION IN SEVERAL LANGUAGES AT ONCE.'**

our 52 trained data staff have full update rights, and only within their own office. The remainder of our users have read-only rights which ensures our clients' records are fully protected. Basically, we have been able to do more with the same number of staff, while clients benefit from more well-informed professionals and a more secure tracking system.'

### Canadian expertise

'Although finally being recognised for its inventiveness and with over a million patents registered to date, Canada is predominantly an importer of IP,' says Rob. 'As a close neighbour of the US and its biggest trading partner, there is also a significant flow of IP across the border. At Gowlings, most of our IP business is from the US, Europe and the Far East, from applicants who have registered elsewhere and want to extend their rights into Canada.'

'We use CPA Inprotech in all of our seven Canadian offices, as well as our Moscow office which, as part of my managerial role, I travel to frequently. If I'm there and a client needs to talk about a file, CPA Inprotech allows me to pull all the information I need up on-screen using the Gowlings Intranet. Don't forget that as a bilingual country, we also need to provide resources for both French- and English-speaking nationals. Our next step will be to look at the CPA Inprotech Workbench module, which will allow us to input and access information in several languages at once.'



Rob MacDonald will be speaking about IP insurance at IP Review Live, 7-8 February 2006. You can find out how to book your place at this ground-breaking event on page 44.

● To find out how CPA Inprotech can help your attorney firm, please visit [www.cpaglobal.com/software](http://www.cpaglobal.com/software) or e-mail [ebrice@cpaglobal.com](mailto:ebrice@cpaglobal.com).