



Retaining and Attracting New Business Through Technology



Roy Scott
Paralegal Manager

Keltie

Summary

Location

London, United Kingdom

Staff

75

Size of Portfolio

30,000 cases

CPA Global Product

Inprotech
Cases and Names, Time Recording
and Billing, Client WorkBench

The Bottom Line

- Reputation of CPA Global and its products are unmatched in the industry
- Inprotech is the industry standard
- Delivering on-demand access to cases improves client service

The 2008 Legal 500* ranks Keltie among Britain's finest patent and trademark law firms, praising it for its "quick and superb" service. Keltie's primary focus is to build personal relationships with its clients and its approach to service excellence has proven to be successful. As a result, the firm's client base has increased by 45% in nine years.

Acquiring new clients inherently comes with an expanding IP portfolio and Keltie took this opportunity to review how to best manage this growth. In order to expand the business without compromising quality, the firm transformed its internal IP management processes to ensure it could handle new client acquisitions effectively.

Implementing an innovative intellectual property (IP) management software solution as part of this strategy has helped the firm maintain and acquire new business without impeding its reputation for excellence in service delivery.

The Firm

Established in 1988, Keltie is a multi-cultural, multi-lingual firm who has grown to over 75 employees. The IP practice consists of over 40 dedicated attorneys and paralegals as well as a solid support team who help deliver service to around 750 clients.

Keltie has established a leading position in the IP marketplace by successfully managing its clients with personal attention and by being aware of its unique requirements. With nearly 30,000 cases under management,

the firm handles filings for products across all technologies and includes clients like Accenture Global Services, Lornamead Group and The Professional Golfers' Association.

Keltie's business model is very unique in that the firm operates on a collective billing structure, ensuring that time can be spent on matters whose long-term benefits outweigh their short-term costs. This methodology ensures that clients are served in the best possible manner—at all times—and positions Keltie as one of the leading innovative law firms in the UK. Additionally, Keltie is the only patent and trademark firm to be placed in the Sunday Times Top 100 best small companies to work for in 2009 and ranked 16th overall.

Business Challenges

Keltie was challenged to find a way to effectively balance the acquisition of new portfolios and continue to provide excellent service. At times organisations quickly bring on new businesses without a plan on how to manage them which can lead to neglect and loss of revenue in the long run. In response to its escalating position in the marketplace, Keltie promptly re-examined its existing IP management processes and identified areas of improvements that would help the firm manage this growth successfully.

Therefore, in 2000, the firm made a strategic decision to overhaul its existing IP management processes to help accomplish this. As part of this strategy, Keltie needed to automate

*Published for over twenty years, the Legal 500 Series provides the most comprehensive worldwide coverage currently available on legal services providers, in over 100 countries.

and centralise its IP management processes. At the time, the firm was using a paper-based system to manage its cases which was very labour-intensive and inefficient. This hindered the ability to effectively offer the excellent client services it had promised to deliver. To fix these obstructions, Keltie evaluated several IP management software solutions to become the core of its practice in handling the growing portfolio.

Keltie required a state-of-the-art technology solution that would allow it to:

- centralise data into one core system
- improve workflows by automating manual processes
- gain a better view of its clients' overall IP portfolios
- reduce risk by generating deadlines automatically through a dependable system
- increase accessibility to cases for staff and clients alike
- allow clients to access case information in real-time, at anytime.

Solution

Partnering with a reputable technology partner was an essential component of Keltie's overall change strategy and implementing a sophisticated IP management software solution would become crucial in securing new clients now and in the future for the growing firm.

After evaluating several IP management systems, Keltie selected CPA Global as its technology partner for the following reasons:

- CPA Global's reputation was unmatched in the industry and its global client base ensured that the user community was actively engaged to ensure product development and enhancements for future releases.
- CPA Global's robust IP management software solution, Inprotech, offered comprehensive functionality. The

flexible platform would allow Keltie to add different modules and customise the system as needed.

- Inprotech set the highest benchmark in the marketplace and was considered the industry standard.
- Inprotech's online capabilities extended Keltie's service offerings and matched Keltie's innovative approach to client service.

"Inprotech has become the industry standard for law firms"

Results and Benefits

Inprotech has centralised Keltie's IP practice, reduced risk of errors and trimmed out labour-intensive, manual activities through automation of its IP management processes. In addition, it has tremendously increased accessibility into its portfolios—which has fostered a more productive environment for staff and extended services to Keltie's clients.

Roy Scott, Keltie's Paralegal Manager, has been an integral player in Keltie's progress and has seen the impacts that Inprotech has made on the firm's IP practice and growth of its client base. "We can go the extra mile for our clients - and retain and attract new clients - with a range of key IP services. This is achieved through the use of CPA Global's technology as part of our IP management strategy," says Roy. He adds "Having a single practice management system like Inprotech has helped improve communication and uniformity of service across the firm."

Total IP & Practice Management

Inprotech is a full IP & practice management system allowing Keltie to completely manage its clients' IP portfolio as well as its internal practice. Integrating billing and time recording as part of the core system has given Keltie a global view of its portfolio. This new platform has realised several benefits for Keltie.



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Moving from a paper-reliant system to a fully automated system has helped the firm improve its entire business processes which have resulted in:

Managed risks: significant automation of the system reduced data entry errors. For example, deadlines are calculated automatically which is critical in protecting its clients' portfolio. Using Inprotech helps Keltie secure its clients' filings without compromising the integrity of their portfolio.



Increased productivity and efficiency:

the paper-based system was very time consuming and labour-intensive. With Inprotech, the time it takes to perform tasks has been reduced because of the automated functionalities. For example, sending out reminder letters to clients can be done automatically in mass scale and can be customised to the unique requirements of the clients which help deliver dedicated service. “With our previous system, this process would take hours. With Inprotech, it only takes a few minutes,” explains Roy.

Improved workflows: because Inprotech is a very flexible platform, Keltie has customised its workflows to match its clients’ unique requirements. For example, some clients rely on

Keltie for the entire life cycle of events whereas others only need the firm to act on office actions. “Using Inprotech’s flexible workflows, Keltie is able to respond to client needs quickly and efficiently,” says Roy.

Integrated billing: Keltie uses Inprotech to easily and precisely bill its clients. Time spent on cases, client fees and official fees from PTOs is accurately recorded in Inprotech which then automatically generates invoices. This allows Keltie to improve the billing process with its clients.

The ability for Keltie to automate much of the administrative functions allows the firm to provide better service to its clients and frees up that time so that attorneys can concentrate on building personal rapport with their clients and advise them on their portfolio.

Fully Accessible

Attorneys and staff can access cases in Inprotech at any time, from anywhere, which makes it easy to work as a team when people are travelling or are out of the office. As a result, response time to clients has been reduced, and productivity has increased.

Overall, the impact that Inprotech has had on Keltie’s productivity is considerable. “CPA Global’s technology has allowed the firm to provide increased accuracy in recording time, improved billable hours, faster production of invoices, easier report generation for management, and better creation of schedules for clients,” says Roy.

Extended Client Services

As part of its strategy to provide tailored, on-demand service, Keltie implemented Inprotech’s web-based Client WorkBench module as an extended service to its clients. The Client WorkBench is a transparent extension of Keltie’s website and clients have been impressed with the easy-to-use and easy-to-navigate browser which gives them secure and customised access to their cases.

“Using CPA Global’s technology, Keltie has been able to adapt to the needs of the modern-day clients and deliver a service that they expect from a leading IP practice firm”

Clients can check statuses of their cases online, perform tasks and communicate with Keltie’s attorneys. This platform facilitates information exchange where clients can communicate with their attorneys electronically without having to write letters or make phone calls. Clients can pass instructions to their case manager at any time giving them more convenience. They can also log into the secure Client WorkBench to:

- Access their portfolio online to track the progress of their cases. Keltie determines and sets up who may have access and how much access the individual client has, based on his or her relationship to the case.
- A list of the events due for their case portfolio which Keltie can restrict to include only those events and critical dates that are relevant to its clients. An email facility within the module lets clients contact Keltie regarding reminders and action items associated with due dates.
- Instantly search on all their cases and IP contacts through the quick search option. They can also email attorneys assigned to their cases right from the browser. The advanced search option lets Keltie’s clients run reports and more complex queries which can be saved and be readily available from the Search menu later. Clients can access reports on “To Do” lists, information about what’s due, case details in Microsoft Excel spreadsheets, XML or Acrobat PDF files.

Using the Client WorkBench has significantly reduced paper communication which can often take longer to respond to and be unmanageable. The electronic communication method provides “real-time” interactions between Keltie and its clients. This innovative approach has set Keltie ahead of its competition that still relies on heavy paper-based interactions. Ultimately, this allows Keltie to uphold its reputation for being a “quick and superb” firm.

CPA Global centralised Keltie’s IP management processes, moving them from a paper-based system into one core automated online system. The firm now has complete IP and practice management to automate its processes allowing the staff to focus on delivering excellent services and growing the firm.

“Inprotech has become the industry standard for law firms,” says Roy. He adds “Using CPA Global’s technology, Keltie has been able to adapt to the needs of the modern-day clients and deliver a service that they expect from a leading IP practice firm.”

Roy’s instrumental role in the evolution of Keltie’s IP practice gives credits to CPA Global for assisting in this process. “Working alongside CPA Global has helped Keltie develop its service offerings to provide the best possible support to its clients,” says Roy. He adds, “As a growing firm we are able to extend the capabilities of Inprotech’s advanced, innovative and configurable technology to help us take on larger and more diverse clients with ease.”