



Emilie Benschoter
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Summary

Locations

Watsonville and Campbell, California

Global Staff

19

Size of Global Portfolio

2,500 Cases

Website

www.wagnerblecher.com

CPA Global Solution

FoundationIP

The Bottom Line

- FoundationIP's platform enables the firm to electronically manage its entire IP process from one single web-based system.
- FoundationIP is the cornerstone of the firm's business development strategy
- FoundationIP's advanced tools automate many of the firm's business processes creating many benefits, including more efficiency, productivity and accuracy.

Laying the Foundation to Become a Premier Intellectual Property Practice

Wagner Blecher LLP formed in early 2007 by patent attorneys John Wagner and Matt Blecher as a small intellectual property (IP) firm tailored specifically to technology companies. With over 30 combined years as registered patent attorneys, the partners wanted to capitalise on the need for more comprehensive and customised IP and service management practices in launching their firm.

Since laying its roots in the region of California's Silicon Valley, Wagner Blecher, with its 19 staff members, proved that it can take on large clients for a firm its size. One reason for this success is the firm's use of a state-of-the-art IP management system which Wagner Blecher coupled with its steadfast strategy on being innovative.

The Firm

Wagner Blecher exclusively focuses on patent prosecution for hi-tech companies whose products range from sensory touch pads to zip drives to streaming media. Located in Watsonville and Campbell, California, the firm services clients with concentrations in electronic and electro-mechanical technologies that have portfolios ranging from one to 1,000. The firm has a total account management services approach: A paralegal assistant and agent are responsible for a set of accounts, thus giving Wagner Blecher the ability to deliver personable, tailored, one-on-one service to all its clients. The firm manages 1,500 current patents which include close to 200 new applications and over 500 responses annually.

IP Management Challenges

In order to support the firm's growth strategy and position itself as a premier IP practice able to take on larger clients, Wagner Blecher determined it needed to implement a new IP system and services approach.

The existing IP system at the time was deemed obsolete: It was difficult to use, was not scalable, and the absence of a well-designed user interface limited the firm's ability to complete critical file transfers. Its limited functionality made it cumbersome to pull essential information, thus providing poor reporting. Furthermore, the data entry process required by the existing system increased risk for errors and omissions and consequently delivered unreliable data. Realising these drawbacks could hinder the firm's desired growth and goal in becoming a premier IP firm, Wagner Blecher looked at other IP management systems and upgraded to one with robust functionality, flexible technology and consistent reliability.

Solution and Benefits

After evaluating several providers, Wagner Blecher selected an IP management system that was more reliable, functional, and effective and met the firm's increasing technological and IP management needs. The IP management system Wagner Blecher chose to help position itself as a premier IP firm was FoundationIP, one of CPA Global's suite of software solutions for IP management.

FoundationIP is a web-based IP management system that provides

an online environment to manage matter-related information and activities. FoundationIP addresses the growing need faced by IP attorney firms, like Wagner Blecher, to reduce the overhead and inefficiencies inherent in the paper-based IP management processes. Additionally, FoundationIP incorporates people outside Wagner Blecher's own organisational boundaries into the prosecution workflow.

Since implementing FoundationIP as the firm's total IP management solution, Wagner Blecher has observed multiple advantages:

Empowering the firm's clients

One of the biggest advantages FoundationIP gives Wagner Blecher is its capability to effectively provide a reliable and secure online environment where the firm can manage all matter-related information and activities in collaboration with people within or outside the firm. Wagner Blecher's clients have customised access to view authorised information and perform tasks as collaborators in the IP management process.

“FoundationIP is the cornerstone of our firm's business development strategy. It is supporting the firm's goal to empower our clients to wholly manage their portfolios seamlessly in one central IP system through Wagner Blecher.”

—John Wagner, Partner

Clients enthusiastically embrace the idea of managing their portfolios on demand in one central repository where they can view the docketing process at any stage. Likewise, Wagner Blecher can access its clients'



portfolios whenever and wherever without having to engage clients into unnecessary collaboration; data is readily available to the firm around the clock. Not only does this decrease response time, but it reduces the likelihood of unmanageable communications and undocumented messages. The improved collaboration between Wagner Blecher and its clients strengthens the firm's client relationships.

Furthermore, clients enjoy the same benefits of FoundationIP that Wagner Blecher does: It is reliable, accurate and consistent. These results help position Wagner Blecher as a premier IP practice. According to

Emilie Benschoter, the firm's docketing specialist and patent paralegal, clients are confident with FoundationIP's ability to deliver reliable and accurate data; the automated workflows ensure dates are not missed and references and related patents are automatically tracked.

Full enterprise IP management system

FoundationIP provides enterprise IP management solutions enabling Wagner Blecher to electronically manage its entire IP process from a single web-based system. FoundationIP houses the firm's information including case history; documents; and scanned copies



of actions, drafts and invention disclosures from one easy-to-use interface.

“FoundationIP provides Wagner Blecher with sophisticated tools to automate the creation of standard and custom forms and letters, generate reports, track and propagate references, view patent families, and create and track docket dates.”

—Emilie Benschoter, Docketing Specialist/Patent Paralegal

Wagner Blecher achieved these benefits through the use of CPA Global’s technology:

Reliability and accuracy: FoundationIP automatically flows references within a family of cases. This is vital for managing clients with multifaceted portfolios. Within these families, if a reference is cited in a communication from a Patent Office, a Supplemental IDS is simultaneously docketed and the references to be cited flows to all related matters. This ensures that there is no confusion on which references have been cited or need to be cited. This feature creates consistency throughout the system making the data reliable and accurate.

Not having to worry about the accuracy of the data allows Wagner Blecher to concentrate on delivering first-rate client services.

Up-to-date compliancy: As rules change, they are updated in FoundationIP. It is imperative for the firm to have current rules that are compliant with its local jurisdiction to mitigate risks.

Efficiency through automation: FoundationIP provides advanced tools to automate the creation of standard and custom forms and letters, generate reports, track and propagate references, view patent families, and create and track docket dates. This reduction in administrative tasks allows Wagner Blecher to be more efficient, thus creating more time to concentrate on client management and business development.

Scalability: FoundationIP’s modular platform is designed to grow with Wagner Blecher, and the firm can add on more modules for more functionality as needed. CPA Global’s ongoing development and scalability of its products and services ensure that Wagner Blecher can position itself as an innovative IP practice.

Practice management improvements: FoundationIP’s extensive functionality improves Wagner Blecher’s IP management and practice. The system allows the firm to completely electronically file resulting in these benefits:

- The administrative actions are now automated which promotes more productivity amongst the entire staff.
- Access to information and the ability to follow up on cases are easier because data is electronically captured in one central place.

- Tremendous reduction in postage fees and paper use.
- Saves staff time while freeing them to focus more on substantive activities.

Robust reporting: FoundationIP's reporting capabilities give Wagner Blecher not only a wider view of its clients' portfolios but also the ability to hone in on exactly what the firm needs. The system's full reporting functionality allows Wagner Blecher to:

- Run reports on demand which can be turned around quickly.
- Set up automatic reports on different schedules, either daily, weekly, monthly or whenever the firm or its clients choose. This provides the associates, clients and any other approved individuals involved in the case consistent data and reports; they have a global and detailed view of their portfolios anytime they choose.
- Execute reports that alert the staff of upcoming due dates, as well as, events and action items that are essential in successfully managing their cases.
- Manage workflow and resources. The partners run a workload report every month that assists them in determining how much to assign each associate. This is extremely helpful in reallocating work to other associates as needed and creates a great amount of efficiency as staffing needs are always appropriately met on cases.
- Oversee important areas of its IP process. Wagner Blecher executes ad hoc reports and also schedules running reports on such matters as foreign filings, upcoming due dates, status reports, and quarterly client reports.

Real-time accessibility: FoundationIP's web-based platform is designed to give on-demand access to Wagner Blecher and its clients for real-time management of their portfolios.

The feature-rich FoundationIP solution elevated Wagner Blecher's efficiency and gave the firm innovative solutions on positioning itself as a premier IP practice. As the core of its practice, FoundationIP has been instrumental in supporting Wagner Blecher's business development strategy, improving collaboration amongst everyone involved and enriching the client services the firm provides.

With the entire staff fully using FoundationIP every day and with new clients engaging themselves into the central IP management concept, Wagner Blecher will be able to continue as a premier IP practice.

“The competitive, complex and growing IP market is pushing practices to become more innovative. CPA Global gives us the tools to embrace innovation so we can successfully cultivate relationships with our clients and remain a premier IP practice.”

—John Wagner and
Matt Blecher, Partners