



## **Facilitating IP practice in scaling the business, retaining skilled paralegals and reducing admin costs by up to 50%**

Case study: Capitalise ‘Virtual IP Office’ docketing support services for the patent and trademark prosecution lifecycle

Kutak Rock LLP is a US law firm, founded in 1965 in Omaha, Nebraska, with more than 500 attorneys in 18 offices around the US serving local, regional and national clients. The Intellectual Property patent and trademark prosecution practices are largely concentrated in Omaha, Kansas City and Denver, with additional attorneys located in other offices throughout the firm.

Kutak Rock’s core IP practice includes more than 20 attorneys who focus entirely on IP matters. The practice includes nearly a dozen registered patent attorneys, and has experienced strong growth during the last 10 years. Like many firms, Kutak Rock has

been impacted by the shortage of skilled paralegals, especially in IP prosecution workflows, which require a highly specialized skillset. In addition to staff retention, scaling services to rapidly meet demand and improving efficiency to provide the most cost-effective prosecution services to clients are areas of focus.

In this context, Kutak Rock selected Clarivate Analytics to provide docketing support services — including receiving US, PCT, and Foreign Patent and Trademark docketing items for processing, updating the IP docketing management database, preparing, distributing docket reports, and providing regular reminders to attorneys.



### Bryan Stanley

Partner and Kansas City  
office Corporate Department  
Chair of Kutak Rock

- **Firm:** Kutak Rock
- **Practice:** Intellectual Property
- **Locations:** Omaha, Nebraska; Kansas City, Missouri; Denver, Colorado; and other offices throughout the US
- **Featured Service:** Virtual IP Office – Docketing Support

## Challenges

### Recruiting, training and retaining paralegals for IP work

- High docketing workload required paralegals to work overtime regularly – and contributed to the challenge of staff retention
- Recruitment of and training new paralegals is expensive and time consuming
- Finding specialist IP talent in many cities including Omaha and Kansas City is a challenge.

### Scaling the Business while managing costs

- The growth of the IP practice made it impractical for individual attorneys to keep track of their own dockets
- At the same time, the practice needed a cost structure that enabled it to compete in several regional markets
- On-boarding new clients or a new attorney generated a lot of one-off administration work which impacts the firm's operational effectiveness and costs

### Imperative to improve efficiency in the IP prosecution lifecycle

- The prosecution lifecycle of the patent and trademark portfolio was characterized by batch processes which tended to be time consuming
- The IP Management system was underutilized and there was an opportunity to take greater advantage of the automation features for docketing

## Solution

### Virtual IP Office – Docketing Support

The Clarivate team provides docketing support and management services throughout the patent and trademark prosecution lifecycle. Clarivate updates

“When we were smaller, a few individuals could maintain their own docket; however, as we’ve grown, it has become increasingly necessary to have a centralized system. With our existing paralegals working overtime just to keep up with the docketing load, finding time to train new paralegals increased the burden further.”

Bryan Stanley

“IP work is highly specialized, so you can’t just bring in paralegals from elsewhere in the firm. And turnover is high. Often a firm will invest in training a person, and another firm will poach staff after they’ve been fully trained.”

Bryan Stanley

“We didn’t have the expertise to properly set up our IP management system so we could work more efficiently. Getting to a place where we can automate letters or quickly generate an IDS with prior art references is important and helps us improve the service we provide clients.”

Bryan Stanley

dockets and generates reports using Kutak Rock's existing patent and trademark docketing database.

In addition, Clarivate is providing guidance and support to enable Kutak Rock to get more value from the reporting, alerting and automation features in their in-house docketing system.

Docketing duties undertaken by Clarivate include:

- Receiving and processing US, PCT and Foreign Patent and Trademark docketing items
- Data validation review on all incoming items
- Updating the IP docketing management database with all incoming and outgoing correspondence
- Preparation and distribution of docket reports
- Provision of approaching deadline reminders

A monthly activity report summarizes the work done by Clarivate, including itemized line items so activity can be tracked by office or client.

## Value Delivered

### **Reduces staff management overhead and IP paralegal turnover**

- Recruitment, training and management of administration staff for docketing work is now the responsibility of Clarivate
- Docket processing and reporting burden removed from in-house IP paralegals
- In-house paralegal team focused on more stimulating work to help improve retention

### **Enables the business to scale and manage cost by adding admin resources as and when needed**

- The Virtual IP Office is highly scalable for Kutak Rock, allowing the firm to take on new business without the distraction of having to recruit and train new staff
- By reducing the cost of docketing by as much as 50%, it also means the firm can compete effectively in regions which are more price-sensitive
- Reduces the burden in on-boarding portfolios from new attorneys and/or clients, including validation of documents and dates

*“Because we now operate in a manner that is much more real-time, managing the prosecution process has become much more efficient. When there is a new action or correspondence, one of our attorneys gets an email and can address it immediately. Clarivate is also putting in place reminders for approaching deadlines, so we can be more proactive in managing our time and communicating with clients.”*

Bryan Stanley

*“Our paralegals are a lot happier now that they no longer need to worry about keeping up with the docket, and are doing more of the work they enjoy. As a firm this is critical in helping us to retain our highly skilled IP resources.”*

Bryan Stanley

*“Beyond the core IP administration services, we were also very impressed with the knowledge at Clarivate when it came to our IP asset management system and how to make it work more efficiently for us.”*

Bryan Stanley

### **Improves efficiency in IP docketing processes and management database**

- Frees up attorney time by moving to a near real-time notification and distribution of new actions and correspondences
- Greater value gained from the reporting, alerting and automation features of the existing docketing system

## Who we are

Clarivate Analytics accelerates the pace of innovation by providing trusted insights and analytics to customers around the world, enabling them to discover, protect and commercialize new ideas, faster.

By working with Clarivate's Virtual IP Office, you can reduce the management overhead and costs associated with patent drafting, patent search, patent prosecution and docketing services, while improving efficiency and quality of your IP practice.

For more information:  
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