



Destination IP: A Virtual Summit

The Evolution – and Benefits – of Law Firm Automation



Before We Get Started...



Recording

A link to the recording and slides will be emailed to all registrants.



Questions

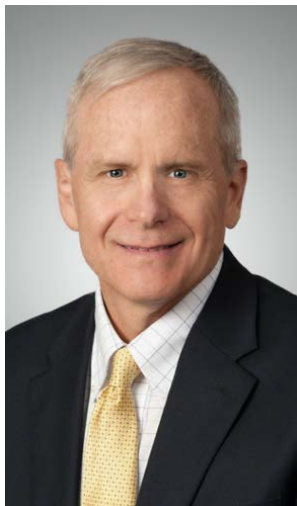
Type in the question box and we will answer in real time or during the Q&A.



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Panel



Steve Lundberg
Schwegman
Principal &
Chief Innovation Officer



Ann McCrackin
Black Hills IP
President



Thomas Marlow
Black Hills IP
President,
Renewals



Peter Rebuffoni
Schwegman
Legal Process
Manager



Scott Otto
Schwegman
Application Support
Specialist



Episode Overview

- How We Got Here
- Components of Automation
- Nuts and Bolts
- Where We're Going



How We Got Here





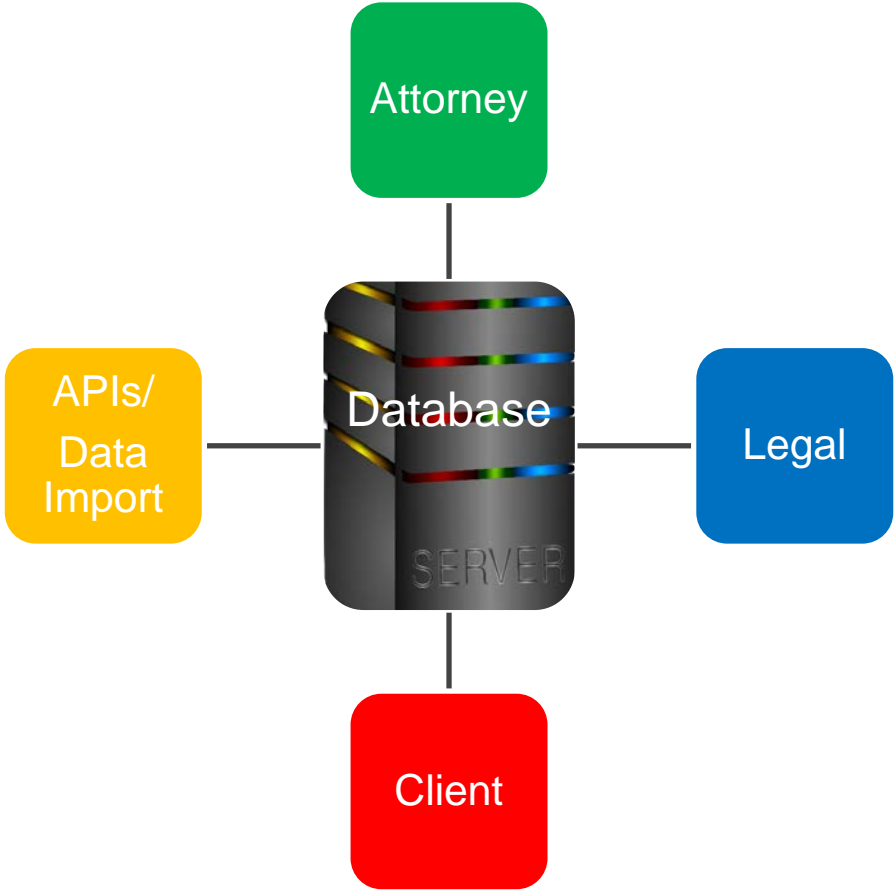
Historical Innovations

- Dictation/transcription
 - ➡ Faster document creation
- Word processing
 - ➡ Document standardization
- Printed file labels
 - ➡ File standardization and barcode system
- Scanning and check in system
 - ➡ File tracking
- Single function database (docketing)
 - ➡ Produce docket deadline reports
- Fax filing
 - ➡ Slow race to the patent office made slightly faster



Historical Innovations

- **Pros:**
 - Working files contained all necessary documents (disclosure, client correspondence, PTO documents, prior art, attorney notes, etc.)
- **Cons:**
 - Sequential workflow
 - Limited opportunities to streamline process
 - Weekly all-company search for missing files



Automation/ Advances in a Database-driven Workflow

- Database scraping
- Automated document/report creation
- Integrated case management
(docketing/document storage/email/
reports/billing/filing workflow)
- Electronic filing

Automation/ Advances in a Database-driven Workflow

- **Pros:**
 - File updates can trigger multiple/simultaneous workflows
 - Speed of updating
 - Integration of multiple sources of data
 - Information export potential

- **Cons:**
 - There's no replacing the new file smell of a trifold folder or accordion prior art folder (and papercuts)



Components of Automation



Data Islands and Systems





Current System Connectivity

- PTO not connected to IP management systems
- IP management systems not connected to each other
- Proprietary automation software not integrated with IP management systems or PTO
- PTO not connected to Document Management Systems



Data Flow Friction

- Most data is still transferred between systems with human labor
- E.g., e-mails report all foreign agent activity and those have to be processed manually to be entered into US law practice system
- USPTO data largely hand processed



Data Flow Friction - Huge Waste

- **As corporations seek to cost cut, a lot of the waste is now in human labor that should not be required to move data around**
- **Industry needs to insist that all vendors and PTO's allow for automated data exchange and processing**
- **Too many proprietary systems in a small ecosystem**



Vendors with Open API's

- **CPI – Computer Packages Inc**
- **CPA Global – FIP etc...**
- **Appcoll**
- **Patnix**
- **OpenLegalAPI – supports open API's**

Middleware Solutions – Key to Connecting the Systems

- **Middleware is the software that allows the various systems to be connected and exchange without human intervention**
- **Black Hills IP is a middleware solution provider that can connect the data islands and provide intelligent automation like automated docketing and reporting**



Nuts and Bolts






Develop, Manage and Support Specialty Software

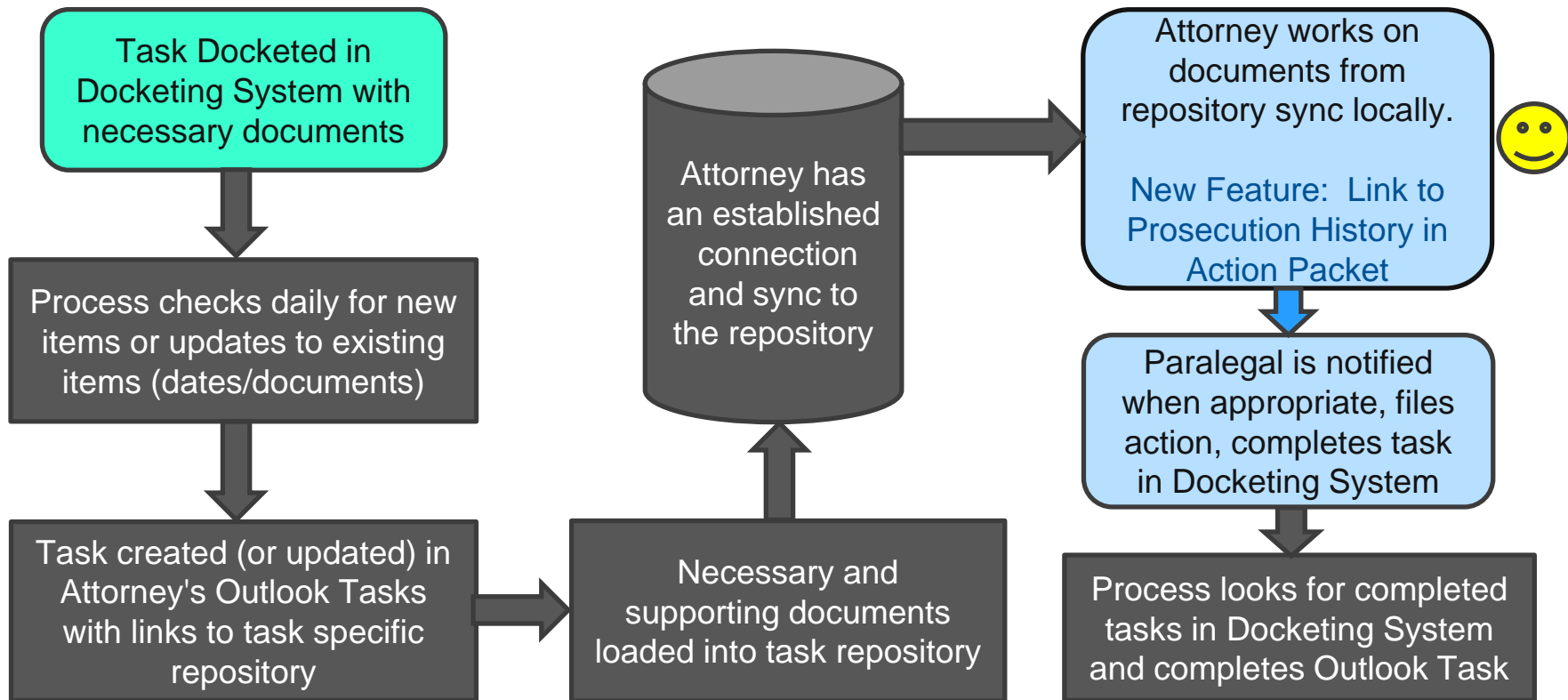
- **Systems used in most of our automation**
 - **FoundationIP**
 - **Accounting**
 - **MS Teams/SharePoint/OneDrive**
 - **Sidebar – in-house**
- **Saving time/creating efficiencies**
 - **Mass/Bulk database updates**
 - **Client Specific Data**
 - **Dates**
 - **Portfolios**
 - **Internal Workflows**
 - **Report Scheduling**





How We Handle Automation at the Firm

- Ideas can come from anyone, but...
 - Is this a training issue?
 - Are the proper tools being used?
 - Development must be cost effective
 - Save time
 - Ensure accuracy
 - Eliminate cracks to fall through
 - Can be maintained and hopefully broadened
 - Reduce stress (maybe)
 - Challenges
 - Keeping the solution simple at first
 - Minimum VIABLE Product
 - Target the present with flexibility for the future
 - Enforce/integrate a workflow for one group while honoring a flexible workflow for another group in the same process
- 



Example: Outlook Task and Action Packet for Attorneys



Automation Killers

- **Data issues:**
 - Dirty or Incomplete Data
 - Finding the hidden data in a web link, e.g.
- **Technical limitations/Cost consideration**
- **Poor understanding (poor communication)**
- **Poor planning (take the time)**
- **Poor execution**
- **Overthinking/Overachieving**
- **Underthinking/Underachieving**
- **Undoing previous automation**
- **Impatience**
- **Perfection vs. something that works**




Recent and Future Automation Developments



Recent and Future Automation Developments

- Fully automated docketing
- Automated drafting
- Recent machine learning endeavors:
 - Machine learning to project attorney billing
 - Projecting expenses for clients
 - Review automation – quality control with machine learning
 - Reviewing docketing
 - SLW built application that reviews bills and figures out how to code them correctly
 - Proofreading
- Commercial tools vs. built in-house



Automated Subscription Docketing

- **Black Hills IP currently offers automated docketing for US prosecution and other major jurisdictions**
- **Faster, cheaper, more accurate, less risky than manual docketing**
- **Within five years people will wonder how this was ever done manually**



Middleware Solutions

- **SLW and Black Hills IP Technology
Middleware**
 - **Captures all your data from
various outside sources**
 - **Allows you to automate a
multitude of manual processes**
 - **Affords opportunity to do
things never before possible**

A close-up photograph of a white, articulated robotic hand with visible joints and screws, positioned over a black laptop keyboard. The hand is in the process of typing, with its fingers curved over the keys. The background is a soft, out-of-focus gradient of blue and yellow light.

Role of Robots and Repetitive Rote Work

**Do you want to be the
robot, or supervise the
robots doing rote
work?**



Thank you for your interest.

Questions?



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