CASE STUDY

VOLPE & KOENIG EVOLVE TO SUPPORT CHANGING CLIENT NEEDS WITH CPA GLOBAL
Volpe & Koenig, P.C. is a full-service boutique intellectual property law firm with more than 50 intellectual property attorneys, patent agents and technical advisors, and approximately 40 support staff. The firm specializes in many areas of technology and has served a diverse roster of U.S. and global clients for more than 30 years.

Volpe & Koenig has a long-standing partnership with CPA Global that has continued to grow as the firm has changed to best support their clients.

**Objectives: Firm Modernization**

Attorney Michael B. Smith joined Volpe & Koenig out of law school and has been with the firm for over twelve years. In 2014, he was promoted into a management role to lead the docketing department through modernizing their approach and systems.

With fixed fees becoming the norm, the firm was looking for a way to continue providing high quality work for their clients, while striving to be as efficient as possible.

“When I started at the firm”, Smith said, “I don’t think we had any clients that were flat fee clients. Now, most of our clients are fixed-fee clients. Hourly rates are probably going to be a thing of the past.”

The firm’s client needs were changing but they still had very manual processes.

“Before, our support team had to log on to the PTO websites and manually download every piece of correspondence. The number of documents ranged from 50 to over 100 per day. This single activity required hours of manual effort each week.” In addition, manually downloading the documents introduces the risk of missing a document that could lead to a notice of abandonment for one of Volpe & Koenig’s clients.

Eliminating manual steps to significantly increase the firm’s efficiency, opening the support team up to refocus on more valuable efforts, and at the same time eliminate the risk of human errors became the key objective.

**Efficiency Gains with Automation and Team Extension Services**

In their search for automated docketing functionality, Volpe & Koenig’s committee of partners vetted various software providers and chose FoundationIP because of the automation and ease of use it provided the support team. Certain features like the “events module was a gamechanger for us.”
With the new IP management software in place, the entire manual docketing process made way for automation, saving huge amounts of time. Everything that gets mailed is now automatically downloaded by the software and legal assistants no longer have to run the docket and go over it with their attorneys every Monday morning, automated reports specific to each attorney are now directly sent to their inbox.

The biggest challenge in implementing the new software, was that 95% of the firm had to learn a new system after having been on the old one for over 10 years.

“The CPA Global team did an excellent job of getting everyone comfortable and trained on FoundationIP,” Smith remembers.

The efficiency gains are massive as the firm has been able to shave off two and a half to three hours per day on manual work:

- 90 minutes for downloading
- 60-90 minutes on processing

The FoundationIP events module in combination with the support team in India has also eliminated human errors. “Since implementing the events module with the support of team in India, I can’t think of anything that has gotten missed. I believe our accuracy rate is 100%;” Smith states.

EXTENDED TEAM: OUTSOURCED DOCKETING SERVICES: CPA GLOBAL TEAM IN INDIA

Looking for additional areas to streamline, Volpe & Koenig also leverages CPA Global for docketing services helping with USPTO correspondence. The firm could no longer keep up internally and they expanded the services to include support for PCT and foreign docketing. Today, Volpe & Koenig trust the docketing services team in India as an extension of their support team, handling about 90 percent of their docketing work.

Having the CPA Global docketing team in place also eased the transition to FoundationIP since they were already experts in docketing in FoundationIP. The fact that qualified IP professionals are hard to find, this team is extremely valuable to the firm. By the time his team starts their day, everything has already been docketed and reported overnight.

“We could lean on them to help us learn the system. We didn’t need to worry about any ramp-up in terms of them working within the software. They are adaptable and very knowledgeable when it comes to IP Law. They make life easier for us, doing the brunt of the docketing work and helping us with administrative tasks. Anything we throw at them, internal quirks or procedures, they are willing to take them on.”
FOCUSED BUSINESS DEVELOPMENT EFFORT WITH FILING ANALYTICS

“We trust and look to our CPA Global Customer Success Manager for advisment in achieving our goals. When discussing our growth goals, she suggested we look at Filing Analytics to better identify what companies we could help based on our firm’s expertise.”

After one demonstration of the software, the partners were sold. Filing Analytics immediately proved its usefulness when one of the partners and an associate went on a business trip to Italy to visit some existing clients as well as prospecting for potential new clients.

“In the past that would have been a cold call scenario, grasping at straws, visiting law firms that might be in the IP industry.

Still focused on achieving a modern and efficient approach, the firm is keeping the team, from partner to attorney to support staff focused on the highest value work for their clients.

Peace of Mind

“Switching docketing software while at the same time shifting our docketing work from an internal to an external team was a major change, but the support we received was phenomenal. I have full faith in the software and the CPA Global docketing team.”

Volpe & Koenig has leveraged the software and services as well as the expertise of the CPA Global team to meet the challenges of the changing IP industry and the increasingly demanding needs of their clients for over six years. The firm has reached a level of modernization and efficiency that they and their clients are pleased with as they continue to grow.

The confidence in CPA Global never wavered and the strong partnership has given the entire team at Volpe & Koenig tremendous piece of mind.

About CPA Global

CPA Global makes it possible for IP to move at the speed of ideas. We’re the global leader in IP software and services, serving millions of global IP users every day. Our commitment is to give IP professionals the information, expertise and technology they need to manage the world’s ideas.

FIND OUT HOW WE DO THIS AT CPAGLOBAL.COM