

# 2017 Intellectual Property Conference for Legal Professionals

## Schedule and Education

Breakfast

Thursday, October 5 8:00 AM - 8:45 AM

LI10: The United States of Sales: How We All Can Make a Difference When We Need to Sell

Thursday, October 5 9:00 AM - 10:15 AM

Whether it's selling our firms to a prospect, a new service to an existing client, or our ideas to a colleague, we are all in sales. However, our ability to gain alignment, agreement and buy in from others need not require that we manipulate, arm-wrestle or pressure others into agreement. In fact, this often just rushes the rejection. Instead, this session will reveal how we can be more successful more often by elevating the act of selling into acts of service built upon authentic relationship building and active problem solving. The program will also help participants understand the essential process and fundamentals to be disciplined and intentional so that outcomes can be more predictable and reliable. It will also feature specific activities and tactics that are best suited for IP lawyers' personality and strengths. By understanding these best practices, participants will be prepared to not only be better sellers for their own roles and needs, but they will be able to coach or mentor others to do the same.

Objectives:

- Review the AGILE Framework that defines a process for proven relationship building and problem solving that elevate acts of selling into acts of service.
- Identify the five best practices that are suited to IP lawyers' personalities and strengths to help participants elevate their personal and professional brand to drive greater value, buy in and alignment with others.
- Discover tools and templates to help jump-start execution and action around authentic business development.

Speaker Information:

Alycia Sutor

Other Info:

- Audience: Basic
- CLM App Management Category -FS: Legal Industry/Business Management
- CPE Field of Study: Business Management & Organization

- CLE: Law Practice Management

#### LI11: Best Practices in IP Docketing

Thursday, October 5 10:30 AM - 11:45 AM

Docketing for an IP prosecution practice has become much more complicated in recent years. As a result, most law firm managers live in fear of a missed docket deadline. This program will discuss practical steps that you can take to avoid a docketing failure. The presentation will evaluate the risks and benefits of various docketing methodologies, including best practices in view of a transition to a paperless environment. Additionally, we'll identify the most vulnerable docketing processes (such as dedocketing of deadlines) and discuss how to minimize the risk. We will also cover the top unrecoverable deadlines and best practices to avoid or mitigate any resulting errors and liability. In addition, we will examine how to maintain the overall reliability and integrity of the data in your docketing system, including offering tips for hiring people best suited for docketing work.

#### Objectives:

- Evaluate the risk and benefits of various IP docketing methodologies.
- Recognize vulnerabilities in docketing processes and how to minimize the risk.
- Review implementation strategies to avoid missing the most critical deadlines.
- Identify how to reduce the human error component when entering docketing data.

#### Speaker Information:

Ann McCrackin

#### Other Info:

- Audience: Intermediate
- CLM App Management Category -FS: Legal Industry/Business Management
- CPE Field of Study: Business Management & Organization
- CLE: Law Practice Management

#### Lunch with Business Partners

Thursday, October 5 11:45 AM - 12:45 PM

#### CM10: Keynote: Creating a Mindset for Change

Thursday, October 5 1:00 PM - 2:15 PM

The marketplace is changing dramatically and dynamically. Few industries and individuals will be exempt. We can't avoid it, and it's fatal to ignore it. But fear and avoidance is no way to address change. We have to find and create positive outcomes going forward. When it comes to change, most leaders and organizations focus on structures, processes and systems. Few even recognize that without an individual and collective mindset for change and innovation, their best efforts will fail, especially now. This experiential session will show what is really getting in the way, and how an intentional and clear focus on what you want — rather than on what you are trying to avoid — turns insight into actions and actions into breakthrough outcomes. Goodrich will explain how this focus can benefit you, why we unconsciously focus on negative thoughts, and how we can rewire our brains to focus on positive outcomes so that we can steer toward opportunities and away from the threats that a world in transformation will bring.

Objectives:

- Describe the inherent nature of change.
- Identify what is getting in the way of positive change and innovation in your work.
- Recognize how the brain is wired and how to get it working for you and your team.
- Explain how to create an intentional and disciplined focus on the outcomes that you do want.

Speaker Information:

Laura Goodrich

Other Info:

- Audience: Intermediate
- CLM App Management Category: Self-Management Skills
- CPE Field of Study: Communications
- CLE: Law Practice Management

Idea Exchange, Part I

Thursday, October 5 2:30 PM - 3:45 PM

There is something for everyone in the Idea Exchange sessions. This is a unique opportunity for you to participate in lively discussions around hot topics and burning issues with your peers that are unique to the IP environment. You are not alone in your challenges. You will receive valuable feedback from others that are facing the same challenges. Bring back to your office ideas, strategies and techniques that you can implement immediately and make a difference.

This session will be organized in groups of various categories for discussion of the topics you select to participate that are of interest to you; for example, staffing, paperless, etc. The categories will be based on your feedback from the Idea Exchange survey that will go out prior to the conference. Look for the

survey later this summer. Make sure to complete the survey so the topics you want discussed are included.

#### LI12: Who Will Rid Me of This Meddlesome Pest: Solving Client Intake Issues in IP Practice

Thursday, October 5 4:00 PM - 5:15 PM

This session will explore spotting bad clients, explain why they are bad, and why they affect not just the law firm, but also the law firm's good clients. Once we learn how to spot bad clients, we will discuss what to do about them.

##### Objectives:

- Identify how to spot bad clients.
- Recognize ethical issues that bad clients raise.
- Review better client intake skills and procedures.
- Discuss how to plan for better profits by paying attention to client intake.

##### Speaker Information:

Theo Nittis

##### Other Info:

- Audience: Intermediate
- CLM App Management Category -FS: Legal Industry/Business Management
- CPE Field of Study: Administrative Practice
- CLE: Law Practice Management

#### Welcome Reception

Thursday, October 5 5:15 PM - 7:00 PM

#### Breakfast

Friday, October 6 7:30 AM - 8:15 AM

Location / Room: Exhibit Hall

#### LI20: Patents Ombudsman Program Top Inquiries for 2016

Friday, October 6 8:30 AM - 9:45 AM

A review of the top 10 reasons people call the Patents Ombudsman Program, and ways to avoid the most common issues, including application data sheet (ADS), powers of attorney, terminal disclaimers and petitions.

Objectives:

- Explain the types of calls the Patent Ombudsman Program gets.
- Discuss how to fill out an ADS without getting it held as defective.
- Review how to use the petitions timeline to see when a petition will be granted.
- Summarize how to properly do a terminal disclaimer.

Speaker Information:

Dale Shaw

Other Info:

- Audience: Basic
- CLM App Management Category -FS: Legal Industry/Business Management
- CPE Field of Study: Administrative Practice
- CLE: Law Practice Management

Coffee Break in Exhibit Hall

Friday, October 6 9:45 AM - 10:45 AM

FM20: Practical and Ethical Issues with Handling of Funds in IP Practice

Friday, October 6 11:00 AM - Noon

IP firms are responsible for the handling of law firm and client monies in various circumstances. This session will discuss the practical and ethical issues associated with the handling of money, whether it is the firm's money, client funds or third party funds. We will discuss best practices to prevent employee theft and assure compliance with state bar regulations around trust accounts, client and third party monies, distributions and disputed funds. We will also discuss the unique issues associated working with foreign associates and clients, including international wire transfers, global anti-money laundering regulations and avoiding fraud. The discussion will focus on not only policies, but strategies to increase lawyer and staff compliance with these protocols.

Objectives:

- Examine ways to increase substantive knowledge on the laws governing the handling of money in a law firm.

- Develop practical strategies for procedures, monitoring and compliance.

Speaker Information:

Allison Martin Rhodes

Other Info:

- Audience: Basic
- CLM App Management Category -FS: Financial Management
- CPE Field of Study: Finance
- CLE: Law Practice Management

Lunch in Exhibit Hall

Friday, October 6 Noon - 1:30 PM

LI21: Outside Counsel Training: Client Instructions Explained

Friday, October 6 1:30 PM - 2:45 PM

Ever wonder why clients are requesting more and more detailed requirements for working with them and how the clients measure the performance of their outside counsel? Here is your opportunity to learn what's important from the clients' perspective. Through interactive discussions learn directly from a panel of in-house experts from varied technology perspectives. Learn how they operate and how outside counsel's ability to meet expectations and interact effectively using clients' preferred choices in communications, data management and billing systems can affect their decisions on where to keep and send work. Bring back to your office techniques and approaches to assist in the successful management of your clients' IP portfolios.

Objectives:

- Examine how in-house counsel evaluate and rate outside counsel to determine where to send work; what is important to the client.
- Identify approaches outside counsel can implement to assist in successful relationships with their clients.
- Review how in-house counsel use shared databases for IP workflow.
- Discover how in-house counsel use e-billing systems for invoice workflow and for data analysis.

Speaker Information:

Sylvia Chen

Susan D. Sutton

Lisa Brzycki

Arlene Hornilla

Other Info:

- Audience: Intermediate
- CLM App Management Category -FS: Legal Industry/Business Management
- CPE Field of Study: Business Management & Organization
- CLE: Law Practice Management

Dessert Break in Exhibit Hall

Friday, October 6 2:45 PM - 3:30 PM

Idea Exchange, Part II

Friday, October 6 3:30 PM - 4:30 PM

Back by popular demand is a second Idea Exchange session, providing another opportunity to participate in lively discussions around hot topics and burning issues that we face in an IP environment. This session will cover remaining topics from the Idea Exchange survey and provide an opportunity for attendees to seek feedback on other challenges they face. Peers will share information, ideas and best practices to assist you in resolution to your challenges. You may be surprised to find valuable tips to reduce risk or increase efficiency in a process or procedure within your firm that you did not think needed improvement. This session will be staged as an open forum with interactive discussions among all attendees.

Make sure to coordinate return travel plans so you do not miss this Idea Exchange session. In addition to the valuable ideas, strategies and techniques you will acquire and bring back to your office, one attendee of this Idea Exchange session will win FREE registration to the 2018 ALA IP Conference.

Networking Reception in Exhibit Hall

Friday, October 6 4:45 PM - 6:15 PM

Session Code Key

CM – Communications & Organizational Management

FM – Financial Management

HR – Human Resources Management

LI – Legal Industry/Business Management

OM – Operations Management