



PARTNERSHIP THROUGH TRANSITION:
CPA GLOBAL HELPS MINTZ LEVIN EVOLVE
THEIR IP MANAGEMENT TECHNOLOGY

MINTZ LEVIN | CASE STUDY

ABOUT THE CLIENT

Based in Boston, Mass., Mintz law firm's full-service Intellectual Property Practice provides comprehensive, practical IP advice and services to a diverse range of businesses, from startups to Fortune 500 companies, both throughout the U.S. and around the world. The firm's reach and expertise spans across the country and Europe and covers a broad range of technologies in all areas of IP: patent prosecution and litigation, trade secrets litigation, trademark registration and litigation, copyright issues, domain disputes, and more.

Like many major IP law practices around the country, the group at Mintz had acquired a diverse and robust stack of IP software and systems. Unfortunately, they also had an outdated docketing system and 10-year-old IP management system (IPMS) that didn't integrate with much of their technology. "We needed a change," says Tina Powers, Manager of IP Operations at Mintz. Ultimately, the firm turned to FoundationIP from CPA Global — and found itself a whole new level of service as a result.

PRODUCTS & SOFTWARE USED

- FoundationIP
- IP Diagnostics
- First to File
- Patent Research Services
- Patent Data Verification Services

CLIENT GOALS

- Replace outdated docketing software with a more innovative, efficient solution
- Select a more robust, modern IPMS that better integrated with Mintz' existing systems and solutions
- Automate and digitize the firm's document storage, transfer and management
- Choose a partner with deep experience supporting law firms from a business perspective
- Streamline processes to achieve firm-wide buy-in, more efficiency and better outcomes
- Outsource administrative work so that attorneys and staff could be free to focus on what they do best

KEY RESULTS

The IP team at Mintz has wholeheartedly embraced the improvements and are now challenging the Docket team with the number of requests for custom reports and information for clients.

Mintz is also in the early stages of linking Foundation IP with their billing. This link will make a significant impact on the amount of time staff spends processing client bills. The staff is actively engaged in using FoundationIP as well as sending suggestions for improving procedures.

THE CHALLENGE

Along with its steadily growing roster of clients, Mintz' intellectual property practice had acquired a comprehensive stack of modern IP software and systems. Its docketing system, however, was outdated, and its decade-old IPMS did not integrate with many of the firm's most critical systems and tools. The consequence? Decreased efficiency, under-utilized tools and technology, inconsistent document management, and staff forced to spend time on administrative minutia instead of more strategic work.

When the firm first began considering a technology upgrade, the primary intent was simply to replace their docketing system, for which they contacted CPA Global. Over the course of the conversation, Mintz realized that its IP practice would benefit from an entirely new IPMS — along with CPA Global's IP Diagnostic service to ensure they devised a thorough and forward-thinking strategy that benefitted not only the firm, but the clients who depended on them.

THE SOLUTION

Before selecting CPA Global, Mintz vetted multiple vendors through a rigorous request for proposals (RFP) process. Multiple factors eventually led the firm to CPA Global, said Ms. Powers, including:

- CPA's well-established and comprehensive knowledge of the IP legal industry, including the firm's business needs and objectives
- FoundationIP's robust, integrative, SaaS-based IP management capabilities
- A team of IP experts acting as partners to help Mintz improve their business

Though the engagement began with the search for a new docketing system, Mintz quickly realized that there were other factors to consider — including a new IPMS, along with a comprehensive analysis of the firm's entire IP operation. Though Mintz considered engaging a separate third-party firm to conduct the analysis, the firm decided that CPA Global — who was already helping them transition to a new IPMS — already had the best grasp on their business challenges.

With that in mind, Mintz' decided to take advantage of CPA Global's IP Diagnostics, a complementary service that helps prospective clients obtain an objective, third-party view of their overall IP organization.

Over the course of the IP diagnostic process, a team of CPA Global's IP experts traveled to several of Mintz' U.S. offices to speak with a diverse group of stakeholders and potential end users. With every discussion and interview, the CPA team asked a series of pointed, purposeful questions designed to help the firm not only uncover its greatest challenges, but also the potential solutions to them.

THE RESULTS

The combination of new technology, expert services, and deep IP business analysis provided Mintz' IP practice with much-needed insights and actionable guidance for improving their IP operations and securing the best possible outcomes for the firm and its clients.

A More Focused, Streamlined IP Strategy

With so many IP technology solutions and services to consider, choosing the right ones can seem impossible for overburdened IP practices. Working with CPA Global's diagnostic team helped the firm to narrow their options down to the most critical, necessary and beneficial.

Expert Partnership

Because CPA Global already had a deep understanding of Mintz' business and needs, they were able to provide expert, objective, third-party insights about the firm's various business challenges and how to address them.

Best-in-Class Technology

With FoundationIP and First-to-File, Mintz found innovative, SaaS-based IP management software that not only met their existing needs, but that also offered the flexibility and agility to accommodate their growing practice.

A More Resource and Time-Efficient Approach

Armed with the knowledge gained through CPA Global's IP Diagnostic service, the IP team at Mintz was able to identify areas where they could increase efficiency and save costs. The firm was also able to identify where they could add new technology and outside services in order to better utilize their full-time staff.

"We will continue to use CPA Global's IP Diagnostic Services. Our people are eager to participate now and actually volunteer to get involved. The best thing is that I feel like we have a partner in improving our business. We didn't just buy an IP management platform. We got a team of people who take time to understand our business and challenges, and to provide insights that empower us to make better, more successful decisions." Tina Powers, Mintz, Manager of IP Operations

About CPA Global

CPA Global is the world's most trusted IP management company, leading by blending new technology with unrivalled expertise to better many of the world's respected corporations and law firms. Delivered by an outstanding global team of 2000 people, our integrated offering sets the standard for reliability and secure, verified IP data. For our customers, we minimise risk and deliver actionable IP intelligence for better decision making. Put simply, we take the hassle out of IP management, liberating our customers to focus on what they do best.

FOR FURTHER INFORMATION PLEASE CONTACT US AT [CPAGLOBAL.COM](https://www.cpaglobal.com)