

Managing assets, not admin

Many IP firms talk about the need to support clients with strategic, rather than administrative, advice but few actually do it. Francisco Bernardo Noriega of ABG explains how Patricia software helps his firm become a valuable partner.

The Spanish IP profession looked very different from how it does today when Francisco Bernardo Noriega co-founded ABG IP with two fellow patent attorneys in 2003. Following his MSc and a research stint in organic chemistry, Noriega had spent 11 years as a European Patent Office (EPO) examiner before “deciding to see what it was like on the other side”, passing the European Patent Attorney qualifying exams and joining a Spanish pharmaceutical company, ultimately becoming the head of its patent department.

It was this EPO and in-house perspective, together with the thrill of developing his own project, that planted the seeds for ABG.

“Spain was fairly backward in its approach to patent assets at the time, with few filings and few IP professionals in comparison to other European countries, such as Germany and the UK,” Noriega explains that the importance of IP was not really seen, especially not as an asset but just as an admin function.

“It wasn’t simply that IP awareness within companies was under-developed at that time; the same was true in many IP law firms, most of which were focused solely on IP administration.”

He saw a gap in the market, and together with two fellow patent attorneys, Juan Arias and Vicente González, decided to set up a firm that, at first, was focused specifically on patents.

“We wanted to help clients build up patent assets

that reflected and supported their business goals,” says Noriega.

“That requires deep technical and industry expertise, but also knowledge of IP as it relates to other business and legal areas; for example, contracts, licensing, litigation and cross-border trade.”

The IP market has evolved considerably since the firm was founded, and ABG has seen its approach vindicated.

“IP awareness has grown substantially, especially since the financial crisis,” Noriega notes. “IP professionals are being called upon to solve more complex problems, and to reflect their clients’ global and multidisciplinary approaches. Business vision is very important.”

A broader reach

ABG has expanded from its patent-focused beginnings to include copyright, trademark and litigation experts. The team now numbers 35 IP professionals and 30 paralegals and support staff, based out of ABG’s three offices in Madrid, Barcelona and Bilbao, coordinating activities for clients around the globe. With such a wide remit to support, it’s crucial to have the right systems in place not only to safeguard valuable records, but also to automate basic administrative tasks to free up time.

“We knew from the start that we needed to provide clients with a broader EU-based approach, rather than focusing on Spain,” says Noriega.

“We looked for a software that matched our vision



of strategic service delivery. We chose Patricia for its flexibility and good references from our European associates. We knew that our requirements were going to evolve over time, so we wanted a system that could evolve with us."

Noriega explains that Patricia is central to ABG's way of working.

"We use most of its features," he notes. This includes, for example, the automation of prosecution procedures; letter and document generation; contact management; financial reporting; and deadline tracking.

"These developments helped our team of expert paralegals remain steady in number while handling a substantial increase in files, reducing timelines and communicating effectively with our clients," he says.

"It has been a smooth and incremental process," he adds. "New capabilities have been added over time, becoming instilled in our working practices and minimising disruption."

In fact, he says, that it's only when new employees need to be trained on the system that they realise how many touchpoints there are in the firm and how interwoven the software is with their working practices.

"The system is very user-friendly and easy to pick up."

Stakeholders meet to discuss future developments. "We have an innovation culture and our people constantly propose changes and improvements to procedures and the system itself," Noriega explains.



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"Examples are ways to automate or streamline European patent prosecution or the process to control and pay renewal fees."

It's something the firm has been doing every year since it was established and, as a result, ABG and the software have been able to evolve hand-in-hand.

"I appreciate that Patrix IP Helpware develops its functionality in association with its customers," says Noriega. "The company organises an annual Patricia user meeting, where customers can come together and debate new features they would like to see added."

The full picture

The firm's IT team often work with Patrix on developments, which while not directly related to its capabilities, do interact with Patricia.

"We have three core systems: Patricia, our document management system (DMS) and our finance system, and it's important to us that they are fully automated and interlinked," Noriega says.

"Patricia sits at the heart of that, so we work closely with Patrix to make sure that the interface process is as smooth and efficient as it can be."

He explains that ABG prefers to run its financial projections in Patricia and then transfer the data to its finance system.

"We find it more efficient in terms of tracking billable hours, controlling the firm performance, and projecting costs for upcoming renewal deadlines for example," he notes.

The automated data validation functionality is also very helpful.

"When we changed renewals provider, we were able quickly to check client records to identify errors," he explains.

"Likewise, when a new matter is being transferred to us and is already public at the EPO, we can simply download the data, rather than manually enter it each time."

"Patrix is very helpful and supportive," he adds. "The team spent a lot of time with us at the development stage, installing the system, demonstrating its capabilities and adapting it to our needs, even though we were a small firm at the time."

That relationship has continued to strengthen over time. "I like the team there. You can tell they're focused on making Patricia a success for clients," Noriega concludes. ●

To find out more about Patricia IP management software, visit www.patrix.com

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