

## Complying with Client Instructions

Outside Counsel Guidelines have become more comprehensive, and clients are actively enforcing their instructions. These range from real-time information provision to client deadline management to billing rates paid per task. Non-compliance can result in punitive lost revenue to a loss of a client to a 'compliant' competitor. Outside Counsel Guidelines are manageable, if the right tools are in-place.

### Client instructions vary

**Communications:** some clients want to receive communications from the USPTO and Foreign Associates as they are received by their law firm. Others want a 'full picture' of their patents and trademarks at a moment in time and not the incremental flow of individual updates. This has become especially important as clients are managing docket calendars in parallel with clients.

**Soft docketing:** with the high volume of client-required deadlines resulting from client instructions, docketing systems can be quickly overwhelmed by dates that are not 'hard' deadlines. Soft docket management maintains client deadlines in a different system, honoring their importance by not mixing them with other un-related dates.

**Foreign Associate billing:** many clients are requiring submission of Foreign Associate invoices within thirty days of submission, or they refuse to pay them. The firm absorbs the out-of-pocket cost.

### Automate compliance

**Smart workflow:** with robust technology, firms can ensure that the right people are working on the right items at the right item. This removes the hazardous guesswork and allows practitioners to focus on delivering high-quality client work within the deadlines they have prescribed.

**Smart communications:** automating client emails and providing extranet access keep everyone up-to-date and make good sense. By automatically processing Foreign Associate invoices, firms remain within the compliance window. These options can also be queued up for review before they are sent.

### Position IP practitioners to focus on IP work

At Aurora North, we have spent the last twenty years working with IP firms to solve business problems through process and technology improvements. 'Complying with Client Instructions' is one of the many topics affecting IP firms that we're tracking. Contact us at [sales@auroranorth.com](mailto:sales@auroranorth.com) to discuss how we can be of service to you.

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