

# FINANCIAL POISE WEBINARS

## PATENT BEST PRACTICES:

### "INSIDERS" ADVICE FOR IN-HOUSE COUNSEL

#### SERIES OVERVIEW

Using outside counsel to assist in patent application preparation and prosecution is an incredibly valuable manner in which to generate and maintain a robust patent portfolio. Having patent applications prepared and prosecuted by outside counsel can improve short-term workflow management and provide many long-term advantages once a patent has issued. However, utilizing outside counsel can be costly, ensuring quality can be challenging and managing patent portfolios can require a balance of information not always available to all involved. Whether working with a small or large number of outside firms and whether they are small or large in size, this series provides insight that will assist both inside and outside counsel in creating a more effective working relationship. Each episode is delivered in Plain English understandable to business owners and executives without much background in these areas. Yet, each episode is proven to be valuable to seasoned professionals. As with all Financial Poise Webinars, each episode in the series brings you into engaging, sometimes humorous, conversations designed to entertain as it teaches. And, as with all Financial Poise Webinars, each episode in the series is designed to be viewed independently of the other episodes, so that participants will enhance their knowledge of this area whether they attend one, some, or all of the episodes.

#### EPISODE SUMMARIES

##### EPISODE #1

**Patent Application Drafting**  
**Airing February 16, 2017 at 10am CST**

Managing the patent drafting process requires interaction amongst many parties, at the least including an inventor, outside counsel and in-house counsel or other management. This may expand to include multiple inventors, licensing and/or marketing input and different levels of management, both

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in-house and in an outside firm. Managing this group to achieve a high quality patent application that is accurate from the standpoint of the inventor(s) and related technologies, cognizant of current law and ongoing changes, relevant to a business purpose and efficient with respect to the inventor's time, all while enabling outside counsel to remain profitable, can be challenging. This webinar provides insight into these aspects, with experienced panelists on both sides of the fence.

### **EPISODE #2**

#### **Patent Prosecution**

**Airing April 6, 2017 at 10am CST**

Patent prosecution can be managed and carried out using a variety of approaches. Some in-house counsel prefer to be highly involved, while others are more apt to let outside counsel run with things. Attorneys (or patent agents) doing the work of response drafting, brief drafting, carrying out interviews and other tasks employ many different approaches and strategies. This webinar provides insight as to how to efficiently manage outside counsel while ensuring quality.

### **EPISODE #3**

#### **Patent Portfolio Management**

**Airing May 4, 2017 at 10am CST**

Patent portfolio management starts at the inventive stage and doesn't end until a patent is no longer active. Strategies vary widely and goals may evolve over time. Future events, such as those relating to licensing and litigation, can greatly affect such strategies. As patent portfolios grow, management becomes more difficult as does ensuring that the efforts (and expenditures) being made are appropriate. This webinar provides a variety of perspectives that will be useful in ensuring that your patent portfolio is robust, purposeful and managed effectively.