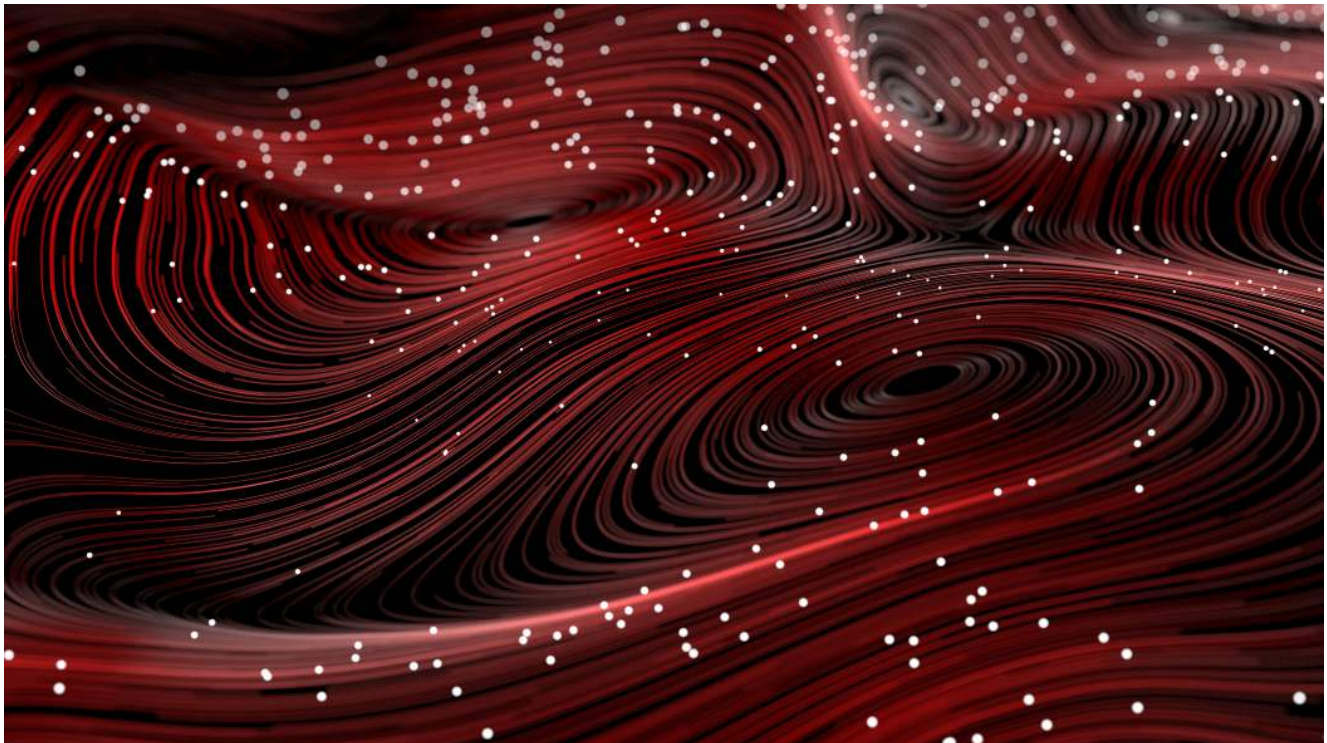

BLACK HILLS AI

A NEWSLETTER FROM BLACK HILLS AI

VOLUME 6



MIDSUMMER RECAP

Happy Summer!

We have reached the midpoint of 2024 and it is an opportune time for a check-in on our progress and reaffirm our commitment to you. At Black Hills AI, our primary endeavor remains to deliver services that are reliable, timely, and accurate, enhanced by continuous improvement, innovation, and a steadfast commitment to excellence.

Achievements in Speed and Reliability

This year, we have taken significant strides in bolstering the speed and reliability of our services. With the transition to Patent Center late last year, we took advantage of the opportunity to re-architect our scraping processes. We continued that effort by improving our accuracy and efficiency in processing the

scraped data both in stream and in parallel. Looking at recent performance metrics reveals our in-stream processing has improved by 60%. At the same time, we increased the parallel processing capabilities and dynamic scalability of our systems not only for our growing customer base, but also other factors including the volume of correspondence on a given day. Thus, despite the USPTO moving the correspondence delivery, we are still able to deliver data and documents early in the morning. Further, on days when there are delays, regardless of the source, we are able to rapidly retrieve, process, and deliver data and documents as corrections are made. Our commitments to reliability and continuous improvement are unwavering and we are only increasing our tempo.

Focus on Accuracy and Innovation

The first half of 2024 has also been marked by exciting innovations in particular with regard to improving accuracy in our collective efforts for your clients. There are three efforts I would like to highlight.

First, we have launched new features in our AI products, each designed to offer smarter, more effective solutions to the challenges you face, improving our Otto GenAI product offerings and the generative AI features available in our Microsoft Word add-in.

Second, as discussed further below, we are continuing to improve our Docket Saver verification service which can be rapidly deployed to address several issues. For example, new employees can be difficult to find, expensive to hire when experienced or train when green, and challenging to retain. Docket Saver helps address these challenges by eliminating manual work, reducing operating expense, freeing up resources to perform higher-value and potentially revenue-generating tasks. Docket Saver also provides these benefits with greater accuracy, less risk, and lower cost. Docket Saver can be implemented quickly and with virtually any IP management system regardless of whether an API is available. We are now offering three free months of Docket Saver for new Docket Saver customers to try it out. Continue reading below and reach out to sales@blackhills.ai to learn more.

Third, this fall we are launching a new product we are tentatively calling Notifications and Alerts. This builds on both Docket Saver verification and PAIR alerts. Notifications and Alerts is a sophisticated software solution tailored for intellectual property professionals, firms, and companies developing and managing IP portfolios. Utilizing advanced algorithms, this system is adept at monitoring and identifying both unusual and unintentional events within patent matters (and soon in trademark matters), ensuring timely and relevant notifications are delivered – including the ability to identify impending errors to assist in mitigation. The system features a customizable alert system, allowing users to tailor notifications to specific patents, jurisdictions, and legal events. An intuitive dashboard organizes alerts by urgency, helping you prioritize your responses effectively. Additionally, the platform enables collaboration and communication capabilities sharing information and strategies, enhancing team efficiency. With capabilities for detailed analysis and access to historical data, Notifications and Alerts not only aids in immediate issue resolution but also assists in risk mitigation. We believe these capabilities will make Notifications and Alerts an indispensable tool for proactive portfolio management and oversight in both practice and for corporate portfolio managers overseeing a portfolio serviced by one or many firms. We are seeking beta users of this product. If you are interested, you can reach out to me directly at jhallenbeck@blackhills.ai.

Looking Forward

As we move into the second half of the year, we are excited about the opportunities that lie ahead and continuing to grow with you. We will continue to focus on enhancing the reliability, timeliness, and

accuracy of our services, and we are eager to introduce further innovations that will transform the landscape of AI technology. In the name of growth, we continue our series on legal sales with our advisor, Rich Cocuzzo. Rich's article this month focuses on building and maintaining a business development pipeline. Rich proposes a ten-step process, many of which you or others you work with are already doing. However, bringing process and discipline to business development efforts can yield consistent, reliable results. At the same time, when your efforts are in fact disciplined and well targeted, you will be able to eliminate more of the fruitless effort allowing you to focus more of your working hours on billable projects and less of your non-working hours on just that – family, friends, and relaxing.

Your Role in Our Journey

Your feedback has been instrumental in our journey so far, and it remains crucial as we continue to evolve. I encourage you to keep sharing your insights and experiences with us. Together, we can ensure that our solutions not only meet but surpass your needs. Feel free to reach out to me directly by email or propose a few times when we can speak.

Thank you for your continued trust and partnership. Here's to a successful remainder of 2024, filled with achievements and advancements that propel us all forward.

Warm regards,
Jim Hallenbeck
President & CEO, Black Hills AI

BHAI SERVICE SPOTLIGHT

WRITTEN BY MIKE CRIVARO & ARYA NAMVAR

As we head into the heart of summer, our team wants to focus on a valuable service that many of our Docketing customers find very beneficial.

Through our Cross-Off service, we can help automate the critical function of de-docketing, or marking items as complete to remove them from the docket.

Take your US patent matters for example. All we need is the electronic filing receipt and our system will review the transactions in Patent Center associated with that date. From there, we analyze the information and our automation launches, initiating specific procedures corresponding to that event. The relevant updates are then made in your system.

To discuss how we can assist you with your cross-offs or any other way to automate your docketing needs, email Sales@blackhills.ai with your availability and we will contact you to schedule a call.

10-STEP PROCESS TO BUILD AND SUSTAIN A ROBUST BUSINESS DEVELOPMENT PIPELINE

WRITTEN BY RICH COCUZZO

A sales pipeline is indispensable for IP attorneys in private practice, serving as a comprehensive tool for managing budding and existing client relationships and facilitating firm growth. This structured approach to tracking potential clients from initial contact through engagement and resolution not only streamlines client acquisition and retention but also enhances the ability to rationally predict workloads and revenue. By providing a clear view of where potential clients are in the process, the pipeline allows attorneys to prioritize efforts, optimize time management, and focus more on billable tasks while minimizing administrative duties. This efficient management of prospect and client interactions not only boosts productivity but also ensures a steady flow of work, which is crucial for predictable, sustainable practice and firm growth.

Moreover, the sales pipeline is integral to effective marketing and business development strategies within a law firm. It enables targeted marketing efforts by offering insights into the most successful approaches and channels for engaging potential IP clients. The pipeline serves as a vital feedback mechanism, supplying data that can be used to refine marketing and client engagement strategies based on real-world outcomes. Additionally, the pipeline supports robust financial planning by facilitating precise revenue forecasting, essential for budgeting and financial management. It also identifies opportunities for scalability, allowing the firm to strategically expand services and improve operational efficiencies based on clear, actionable data.

In managing and growing a law firm, an effective sales pipeline not only ensures efficient workflow and financial management but can also enhance client relationships. It promotes consistent and proactive communication, helping to build trust and demonstrate dedication to meeting client needs. Improved client satisfaction due to timely and effective legal solutions often leads to repeat business and referrals, which are vital for expanding the client base and enhancing the firm's reputation.

Here's a comprehensive process to develop and keep your business development pipeline full:

1. Identify Target Market

- Define Ideal Clients: Identify the types of clients that need IP legal services (e.g., startups, tech companies, pharmaceutical firms, universities).
- Market Research: Understand the specific needs and challenges of these clients in relation to IP law.

2. Build a Prospect List

- Database Creation: Use tools like LinkedIn, industry associations, and business directories to create a list of potential clients.

- Networking Events: Attend industry conferences, webinars, and networking events to gather contacts.

3. Initial Outreach

- Emails and Calls: Develop personalized email templates and call scripts/plans tailored to the needs of your target market.
- Social Media Engagement: Connect and engage with prospects on LinkedIn by sharing relevant content and commenting on their posts.

4. Nurturing Leads

- Email Marketing Campaigns: Send regular newsletters with valuable content, such as recent changes in IP law, case studies, and success stories.
- Webinars and Workshops: Host educational webinars and workshops to demonstrate expertise and provide value to potential clients.
- Follow-Up Schedule: Implement a follow-up schedule for emails and calls to maintain engagement with prospects.

5. Qualification of Leads

- Initial Consultation: Offer a fee-free analysis and early consultation to understand the prospect's needs and assess their suitability.
- Lead Scoring: Use a lead scoring system to prioritize leads based on factors such as company size, industry, conflict potential, and specific IP needs.

6. Presenting Solutions

- Customized Proposals: Create tailored proposals that address each prospect's specific needs and challenges.
- Case Studies: Present case studies and success stories highlighting your expertise and successful outcomes for similar clients.

7. Closing the Deal

- Negotiation: Be prepared to negotiate terms and fees to align with the client's budget, billing guidelines, file transfer process and expenses, and expectations.
- Client Agreement Letter: Ensure a smooth client agreement letter process, with clear communication of terms and next steps.

8. Post-Engagement Follow-Up

- Onboarding Process: Implement a structured onboarding and file transfer process to ensure new clients feel welcomed and understand how to work with you and your team.
- Regular Check-Ins: Schedule regular check-ins to ensure client satisfaction and address ongoing needs. Occasionally include someone outside of the day-to-day client interaction to solicit honest, frank feedback.

9. Client Retention and Referrals

- Quality Service: Consistently deliver high-quality, timely service to maintain client satisfaction. Measure timeliness and quality based on metrics and inventor and client feedback.

- Client Feedback: Collect feedback regularly to improve services and address any issues promptly.

10. Measure and Optimize

- Track Metrics: Use a CRM system to track key metrics such as lead conversion rates, client acquisition costs, and client retention rates.

- Continuous Improvement: Regularly review and refine the sales and daily processes based on performance data and feedback.

Tools and Resources

- CRM Software: Use CRM software like Salesforce, HubSpot, or Zoho to manage your pipeline and track interactions with prospects and clients.

- Email Marketing Platforms: Utilize platforms like Mailchimp or Constant Contact for email marketing campaigns.

- Networking Tools: Leverage LinkedIn Sales Navigator and industry-specific networking platforms to connect with potential clients.



Rich Cocuzzo is the Founder and President of Sales Velocity Advisors and a trusted advisor to Black Hills AI. He can be reached at rich@salesvelocityadvisors.com.

DOCKETING TURNAROUND TIME

WRITTEN BY JUSTIN BRUHN

With automation continuing to ramp up, we are able to download, process, and docket items faster than ever. For some services, like US automated docketing, most items are added to your system same day. Even so, there are issues that can prevent docketing from taking place as quickly as we would like, such as USPTO delays, verification flags, or unique client requests that require manual intervention. As such, we work to ensure all docketing is completed within a three-day window. The count starts from the date the communication is received and excludes all weekends and Holidays as outlined below. If you are ever curious as to whether or not a certain matter is in our docketing queue, you can find all relevant information within the Docketing Received tab of our Black Hills AI Portal (portal.blackhillsip.com).

Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
	Communication Received By BHIP	Day 1	Day 2	Day 3		
Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
			Communication Received By BHIP	Day 1	Day 2	
	US Federal Holiday	Day 3				

Holidays include: New Years Day, Presidents' Day, Memorial Day, Independence Day, Labor Day, Thanksgiving Weekend, Christmas Eve, and Christmas Day.

DOCKETING VERIFICATION

WRITTEN BY ELLEN FRANCO

At Black Hills AI, we have implemented a robust automated review process that significantly enhances the efficiency and accuracy of our docketing services. Our system meticulously compares all docketing entries against specific rules tailored to each matter and document type. This precision ensures that our skilled docketers need only focus on entries that present issues requiring human intervention, streamlining the overall process.

Additionally, we offer a unique service known as "Docket Saver" for customers managing their own docketing but seek an additional layer of assurance. Through this service, we utilize your USPTO correspondence to generate a report of expected outcomes and perform an analysis of what either made it onto your docket in view of what should have made it onto your docket. We identify disparity in outcomes and bring them to your attention thereby enabling your team to ensure accuracy and peace of mind in your docketing practices. Use of Docket Saver eliminates manual review of every docket entry, instead enabling your team to focus only on docketing entries, or lack thereof, that may in fact be errors. This eliminates 95-98% of manual effort while still complying with the industry-standard best practice of reviewing every docketing entry. Even better – our automated Docket Saver verification more reliably identifies potential docketing issues faster and for less expense. For more information, reach out to sales@blackhills.ai.

MORE TO OFFER FROM BLACK HILLS RENEWALS

WRITTEN BY CAROL WELLS

Black Hills Renewals understands there may be times when you need help researching information, manually instructing on matters, or creating unique reports. This commonly occurs when a portfolio has been acquired and you want to make sure renewals have been paid, or what the status of the matters are. Sometimes a unique report is needed to determine which patents are doing better than others. We are here to help as part of our White Glove Services.

Several country patent office websites will show renewal information, however the amount of information provided varies widely. Some show past payments and next due dates, whereas others only show one or the other. Then there are some that do not show any renewal information. For the countries that do show renewal information, we can do the research needed to verify annuity payment information. During this annuity payment research, we also offer to update instructions in your Renewal Center, accordingly. While each of these processes can be a stand-alone White Glove Service, with their own rate per matter, we can also combine these services at a discounted rate.

If you need a report, we offer several standard reports within our system, at no additional cost. These reports come directly from our portal and can be scheduled to be received on a regular basis. However, if you need a custom report, something unique for your business, we can provide that information also as part of our White Glove Services.

Black Hills Renewals wants to help our customers succeed. If these additional services will aid in that, do not hesitate to contact us. If you are interested in learning more about the additional services offered, and their prices, please visit our [website](#) for more information. Ready to move forward with a service? Don't hesitate to contact us at annuities@blackhillspirenewals.com to begin the process.

BHAI EMPLOYEE SPOTLIGHT



Name: Ellen Franco

Role: Docketing Manager

Location: Minnesota

When did you join Black Hills AI?:

I have been with Black Hills since August 2015. I have been lucky to see the evolution of automated docketing firsthand!

What experience has made the biggest impact in your life?

It might sound cliché, but becoming a parent to so many children in such a short span has profoundly impacted my life. Parenthood has taught me to balance family and personal time with work, live in the moment, and efficiently manage my daily tasks. I've become adept at multitasking, prioritizing, and quickly identifying and addressing threats. These skills are invaluable, both in managing a household and overseeing the docketing department..

Tell us a bit about yourself...

I am a busy mom of 4 kids. Olivia Rose (5), Sim III (3), Santana (1.5) and Penelope Rae (1.5). Work is my vacation from opening snacks, refereeing sibling squabbles, and changing diapers. Despite the chaos, I cherish every moment of these toddler years. Family is central to my life; one of my sisters lives just ten houses away, and my parents are a mere three miles from us. Most of my time is spent with family, enjoying life, watching the kids play in the yard, teaching them card games, or racing Super Mario cars.

What are you reading and listening to these days?

Taylor Swift - The Man on repeat all day. Additionally, I enjoy watching Ms. Rachel's YouTube preschool shows with my children.

What is your favorite hobby and why do you enjoy it?

I am a waterbug. I feel so much peace being in or near water.

WEBSITE

YOUTUBE

LINKEDIN

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www.blackhills.ai