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Capsis Trademark & Brand Management Platform

BizStream

LAW/LEGAL

Background

Warner Norcross & Judd's Capsis trademark management platform enables users to easily manage their clients' U.S. trademark portfolios and reduce costs. By integrating key portfolio data with workflow processes, Capsis brings automation to trademark registration and protection.

Goals

- Migrate an incomplete existing product to an environment that is easier to manage and to consolidate server resources
- Expedite reactions to those events by providing a simple interface for Capsis and its clients to interact more efficiently
- Monitor competitors' trademarks and alert client when changes have been made
- Monitor when clients' trademarks are cited in other trademarks
- Monitor keywords or terms and notify clients when matches occur
- Simplify ways for Warner Norcross & Judd to interact with their clients in order to request information on existing client trademarks and creating automated action items. This will allow Warner Norcross & Judd to notify clients of changes that may need to be made such as renewals or updates

Challenges

Synchronizing the United States Patent and Trademark Office (USPTO) database with Capsis database:

- Dealing with tens of thousands of daily USPTO changes to keep the database synchronized with the Capsis database to ensure the database is always up to date
- USPTO only allows 60 requests per minute, per IP address. This limits capacity in which the database is updated

Finding a way to determine if a trademark action item could be a 2(d) refusal. 2(d) refusal is issued by USPTO when trademark filings are considered to be close to live trademarks.

- This is a challenge because the existing trademark holder is not notified from USPTO that someone is filing a similar trademark

Warner Norcross & Judd did not have a customer facing website for client trademark management:

- Warner Norcross & Judd needed their internal system integrated with an external website that could be accessed by their clients

"Our experience with Kentico has been excellent. As an award-winning technology platform, Kentico provides us with stability and scalability, each of which was very important to us as we expand the Capsis program and the demands that we and our clients place on it."

"Capsis was originally designed and developed on a freestanding technical platform. We quickly realized, however, that we needed a stable and robust platform. Although we chose BizStream for several reasons, its expertise with Kentico was a primary consideration. BizStream has a proven history of success, and its deep understanding of Kentico ensured that Capsis was a success and leveraged all that Kentico has to offer. BizStream delivered on each of its commitments during the project and did so on schedule and within budget."



James L. Scott
Partner
Warner Nordcorss & Judd

Solution

- BizStream created an automated queuing system using scheduled tasks in order to prioritize and issue requests to USPTO properties
- Create an email processor to look for any mention of trademarks serial or registration numbers in all office action items leaving the USPTO - which then notifies that trademark holder
- Created the ability to have worker applications (separate smaller applications to send to one main hub) in order to spread out the request load to multiple locations, ensuring the most up-to-date data
- Synchronized proprietary trademark management system database to a public facing website for client interaction

Results

Capsis has helped Warner Norcross & Judd market their trademark and brand management services to both prospective and existing clients in a way that stands out from other law firms. Because of the new application, Capsis has gained a variety of new clients that have contributed to more than \$500,000 in additional trademark revenue, and has seen an increase in revenue from current clients.

Capsis provides a unique service to Warner Norcross clients, and the data generated by the program often provides additional opportunities to serve clients. According to one of the newer clients, "Capsis is a valuable tool in managing our trademark portfolio. It provides a secure, up-to-the-moment 24/7 single location access to our registered and pending marks along with related historical and supporting information. This has greatly contributed to a more efficient trademark management process and was one of the reasons we chose Warner Norcross & Judd."

Key Criteria for Choosing Kentico

- Easy-to-handle user and security management
- Easy for client to manage and update different aspects of the website
- From developer standpoint, very easy to customize
- Kentico provides a solid foundation to build upon, therefore, making it easy to add new features in the future
- Microsoft-based technology was desired by Warner Norcross & Judd IT staff
- Scaled well to support large dataset requirements

"Kentico's built-in features and tools allow us to manage and deliver client-specific data and content efficiently. Further, although our project started off small, Kentico has been able to scale easily as Capsis has grown."



James L. Scott
Partner
Warner Nordcorss & Judd



BizStream

BizStream plays favorites and we're not ashamed of it. Kentico is our favorite content management system (CMS). We're one of the top Kentico Gold Partners in the world, proudly tout one of a few Kentico MVPs, and have multiple Kentico certified developers and now a certified marketer.

We're a team of individuals who are Kentico experts and are passionate about building web sites and technologies surrounding the web. We help businesses of all kinds. Located west of Grand Rapids in the small town of Allendale, MI.

Join forces with BizStream and Kentico. Your customers won't know what hit 'em.



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