



The Creative Problem Solving Process



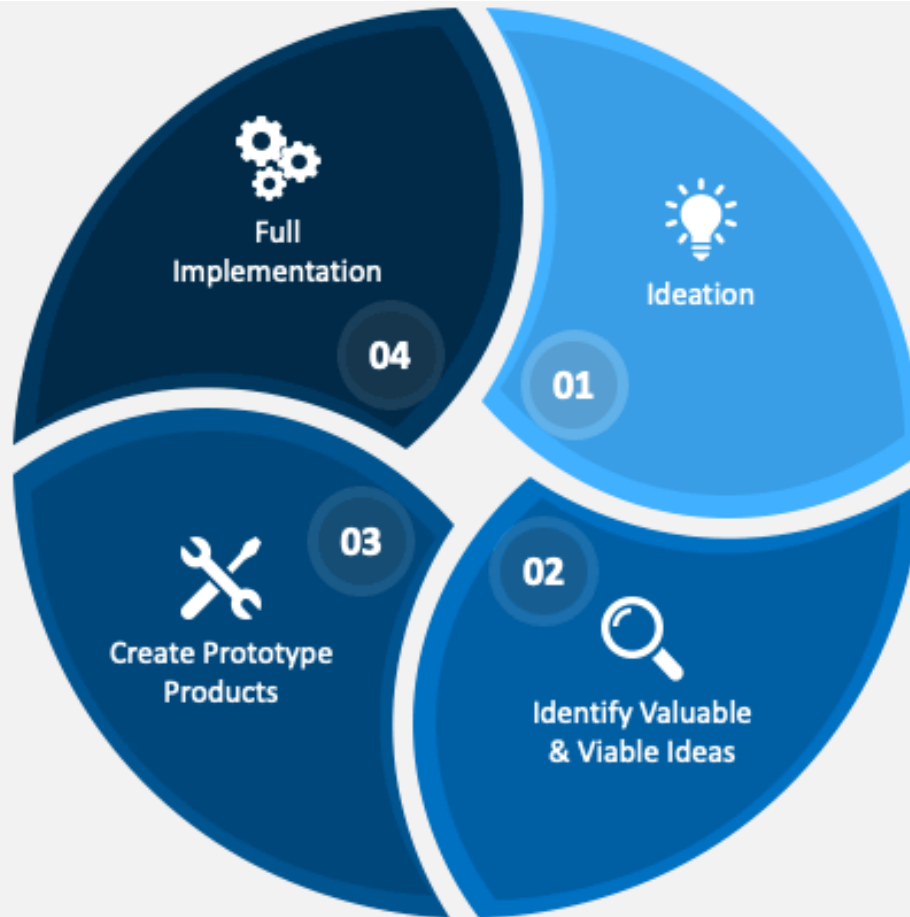
How can we problem solve most effectively?

Basadur Profile Types



▶ **The most efficient teams have at least one of each type.**

The Innovation Cycle



Group Questions for Innovation at C&T

1. What are some pain points in your workday?



2. Which one of those pain points do you all experience or can agree is the most impacting?



3. Are there any trainings or office changes we can do to avoid or “heal” those pain points?



Why is understanding innovation important?

▶ We work with businesses and inventions!

- ▶ By understanding the importance of innovation, we learn that we must start with the problem in order to find the best solution.
- ▶ It is very tempting to start with a solution, but there is nothing worse than coming up with a solution that has no audience, market, or need.
- ▶ How many times have we come across an invention that we want to side-eye...

▶ We are a business!

- ▶ By understanding innovation, we can provide the best service by solving the clients' problems most effectively.

▶ You want to live a productive life!

- ▶ Stop wasting your time on things that are not addressing the real problems in your life.



Part One: Identify the Problem

- I. What are some pain points in your workday?
 - ▶ Dread getting to
 - ▶ Don't understand fully but do anyway
 - ▶ Time Wasted
 - ▶ Slow down productivity
 - ▶ Overall induce negative emotions

Time to DIVERGE, not CONVERGE. – why?



For the Generators/Conceptualizers



General

- Reorganize Management Structure (Dan)
- Large Corp
- Educational Org.
- Cyber / Privacy / Terms
- Expand W & V office
- Form Grp
- Insurance
- Entertainment / Contract
- More Offerings / Jack vs. Init
- More Specific
- "THE IP Lawyer"
- Unfair Comp. } more?
- Trade Secret } Focus
- Expert Witnessing
- Mediation (IP)
- More Associates / Contracts (Litigation)
- Trans → Lit. vs. we are Litigators?
- Deep Dive (5 locations?)

Billing

- TM
- Slow Report Generating
- \$ segmenting
- Quick Books Client Billing
- VM to email transcribe
- Delinquent Clients
- Collections Firm (Quickly)
- More Atty Focus
- Billing Bulldogs
- Delinquent Clients Weekly Call Sheets
- Understanding previous calls / Need Notes
- Foreign Associate Project Bills
- Inaccurate Quotes / Billing
- Flat Billing
- Edit language Re Cost
- Rush Fees
- Business Plan / Slings
- Central Policy Area / More Firm
- Segmenting based on exp. / edu.
- Frustrated w/ Tech
- Battery Back-Ups
- Streamlining Process / Procedures
- Back-Up Printing
- More Screens
- TM Templates
- TM training
- Phone System / User
- VM to email transcribe
- Internal Tracking w/ Billing
- Time Client Process / Willingness
- Client Unresponsiveness
- Straight to Drop?
- Not Understanding Needs
- Lack of Atty enforcement / process
- Marketing Protocol / ok to Mark?

Operations

Marketing

- Articles / Writing
- Focus on "Full Service"
- Help Grow from small to large
- Expanding Specialist Network / More Reciprocal
- More TM Marketing? Litigation
- Bio IP Law (San Diego?)
- Understanding all parts of process
- More Selecting Client Acceptance / Selectivity (more income)
- Client Vetting / Background Check
- PNC qualification / Intake training
- Online Presence
- Atty Assign w/ Marketing & Customization
- Weekly Meetings?

Part Two: Narrow the Problem

- ▶ Which one of those pain points do you all experience or can agree is the most impacting?
 - ▶ Are some of these point replicates of other?
 - ▶ Does one have a greater impact than another?
 - ▶ Is a preliminary step to other big changes?

Now is time to CONVERGE.



For the Optimizers/Implementers



Head Strategy

General

- Reorganize Management Structure (Dan?)
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- Expert Witnessing
- Mediation (IP)
- More Associates / Contracts
- Trans → Lit. vs. we are litigators?
- Deep Dive (5 locations?)

Billing

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- TM training
- Phone System / User
- VM to email transcribe
- Internal Tracking w/ Billing
- Tire Client Process Willingness
- Client Unresponsiveness
- Straight to Drop?
- Not Understanding Needs
- Lack of Atty enforcement process
- Docketing Protocol / ok to Mark?

Operations

Marketing

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- Focus on "Full Service"
- Help Grow from small to large
- Expanding Specialist Network / More Reciprocal
- More TM Marketing? Litigation
- Bio IP Law (San Diego?)
- Understanding all parts of process
- More Selecting Client Acceptance / Selectivity / more menu
- Client Vetting / Background Check
- PNC qualification / Intake training
- Online Presence
- Atty Assign w/ Marketing & Customized
- Weekly Meeting?

General

1. "THE IP Lawyers"
2. Trans → Lit.
VS.
Litigation Firm
3. More Associates/
Contracts.
4. Deep Dive (5 Locations?)

Billing

1. Time Matters
2. Billing Bulldogs/
Delinquent Clients
3. Flat Billing
4. Foreign Associate
Project Billing

Operations

1. Templates
2. Streamlining
Processes/Procedures
3. Business
Plans/Planning
4. Procedural
enforcement

Marketing

1. Focus on "Full Service"
2. More Client
Selectivity/Vetting <sup>(engagement
equivalent)</sup>
3. More Trademark
Litigation Marketing
4. Understanding All
Parts of IP Process

Part Three: Reframe the Problems

- ▶ We often get trapped into a single thought while identifying a problem based on “how we have always done things”
- ▶ By reframing the problem, we could see the pain point in a new prospective.
- ▶ This is best done through turning the pain point into a question(s).
- ▶ “How Might We ...?”



For the Generators/Conceptualizers



Part Four: Identify Solutions/Heal Pain Points

- ▶ Answer the “How Might We...?” questions with solutions.

- ▶ *Time to DIVERGE.*



For the Generators/Conceptualizers

- ▶ Once you’ve exhausted your brain, you can then go back to step two, which is narrowing the solution.

- ▶ *Time to CONVERGE.*



For the Optimizers/Implementers



Operations How Might We...

1. Templates

- Staff template Clean-up
- Wed. Meeting Template Approval
- Remind personnel to start at templates

Mark
Kelly C.

2. Streamlining Processes/Procedures

- Docketing Compliance
- A/R (Letter, A/R, Call, Drop)
- CC: Lawyer

Tara
Laura

3. Business Plans/Planning

- List of Referrals

Dan/Mark
Christina

4. Procedural enforcement

- Operations Manual (w/Signatures)
- Update job procedures
- Preparing of Memo's re lack of enforcement

Tara
Kelly M

Marketing How Might We...

1. Focus on "Full Service" to whom?

- Bar Association Speakers/Writers
- \$TM entering → IP Advice
- Monthly Newsletters (Social Media Plug) → email outreach to list
- Corporate Counsel Meeting/Newsletters
- Influencer → Writing

Christina
Dan

2. More Client Selectivity/Vetting

- Vetting Checklist
- Client Criteria
- Don → PNC → young Attys

Don
Mark
Christina

3. More Trademark Lit. Marketing

- Writing
- Checklist
- Speaking
- promote more watching services

Christina
Kelly

4. Understanding All Parts of IP pieces

- Writing
- PNC flowcharts
- Chapters on website
- Attorney's Guide Book?

Christina

Billing How Might We...

1. Change TM?

1. Billing Subcommittee w/ TM problems w/ TM consultants
2. Alternative Systems

Dan
Jaime
Laura
Tara

2. Reduce Delinquent Clients? Payment

- Billing Buildlogs
- Weekly Atty Call List w/ Reports/Memos
- Decrease time before collections (30 days)
- Stricter Procedure/Timeline
- Earlier Cut-off/More Returners

Dan
Owen

3. Institute Flat Billing

- Templated Rate Sheets internally

Mark
Kelly
Tara
Laura

4. Bill by Project re: FA?

- Menu for FA
- internal team/coordination
- FA Billing Protocol

Laura
Tara
Dan

In Summary...

- ▶ An effective problem to solution cycle is:
 1. Identify the Problem
 2. Narrow the Problem
 3. Reframe the Problem
 4. Identify Solutions (and narrow solutions)

In theory, you can identify/narrow/reframe an infinite amount of times to get the peak solution, but who has time for that.

