



**Al Kalthami**

Attorneys & Legal Consultants

Commercial & IP

**Al-Kalthami Attorneys & Legal Consultants**, a law firm specialized in Intellectual Property (IP) Law

# Overview

Al-Kalthami Attorneys & Legal Consultants, a law firm specialized in Intellectual Property (IP) Law, faced challenges in efficiently managing their IP matters using Microsoft Excel, resulting in missed deadlines and inefficient processes.

By implementing Zoho CRM and Zoho Books, these challenges were effectively addressed, leading to a significant increase in trademark filings and streamlined operations. Key takeaways include enhanced productivity and automated deadline management.

# Executive Summary

**Location :** Riyadh, Saudi Arabia

**Business History :** With a rich history in the legal field, the firm specializes in Intellectual Property Law, offering comprehensive services in IP filings and management.

**Field of Business :** IP filings and management

**Nature of Business :** Law Firm

**other customer business-related information :** Nil

**An opening quote from the customer:**

# Problem Statement & Key Challenges

## Problem Statement:

The firm initially managed their IP matters through Microsoft Excel, which became increasingly difficult as the volume of filings grew. In 2017, they handled around 100 trademark filings, which surged to 300 in 2018, leading to missed deadlines and time-consuming processes.

## Key Challenges:

"Managing our increasing number of IP filings manually was overwhelming and impacted our efficiency", said Ashif Abdulla, Operations Manager & IP Specialist at the firm.

# Evaluation of the Problem

Our team evaluated the firm's challenges using Zoho's expertise, identifying key process gaps in their IP management and financial operations. We determined that implementing Zoho CRM and Zoho Books would streamline these processes, automate crucial tasks, and enhance overall productivity.

# Proposed Solution

We proposed Zoho CRM for managing IP filings and Zoho Books for handling financial matters. These products offer functionalities like automation of routine tasks and deadline management, making them the best fit for Al-Kalthami's requirements. Custom modules were added for managing deadlines, office actions, and renewals, ensuring easy management by the respective lawyer.

# Implementation

1. **Duration** : 2 months
2. **Bottlenecks** : Data migration
3. **Mitigation** : Expert customization and support
4. **Additional services** :
  - Data Migration
  - system customization to tailor the solutions to the firm's needs

# Result

Post-implementation, Al-Kalthami Attorneys & Legal Consultants seamlessly handles around 1,300 trademark filings, 200 patent filings, 1,500 patent renewals, 400 trademark renewals, 375 trademark recordals, 20 court cases, and 300 other IP-related matters. Previously, they managed around 300 trademark filings and 50 patent filings, among other tasks.



# Final Output

*"we've significantly improved the client's operational efficiency and client service"*