



**SLW INSTITUTE**  
**GLOBAL IP CONFERENCE**  
with Advanced PCT Training | 2018

**Program Guide**

April 10 & 11, 2018

Embassy Suites by Hilton | 12 South 6th St., Minneapolis, MN 55402



# Day 1

April 10, 2018

**SLW Institute Global IP Conference Agenda: Tuesday April 10, 2018**

Time	Track I: Global IP Strategies	Track II: European Patent Practices	Track III: Strategic IP Management
8:00 – 9:00 AM	<b>Registration &amp; Light Breakfast - Plymouth Pre-Function</b>		
9:00 – 9:15 AM	<b>Opening Remarks - Plymouth Ballroom A</b>		
<b>Session 1</b>			
9:25 – 10:25 AM	<p><b>Top Five IP Interactions with GDPR</b></p> <p><i>Speakers:</i> Liz Fortier, Lucid Mark Stignani, Schwegman</p> <p><b>Room: Topaz</b></p>	<p><b>Differences and Parallels in Computer Implemented Inventions (CII) at the EPO and USPTO, Post-Alice</b></p> <p><i>Speakers:</i> John Collins, Schwegman Piers Blewett, Schwegman</p> <p><b>Room: Turquoise</b></p>	<p><b>The Role of Artificial Intelligence in Docketing Your IP</b></p> <p><i>Speakers:</i> Milena Higgins, Black Hills IP Zhakalazky Carrion, Schwegman</p> <p><b>Room: Sapphire</b></p>
<b>Session 2</b>			
10:35 – 11:35 AM	<p><b>FBI Case Files: Protecting Your Critical Information</b></p> <p><i>Speakers:</i> Shena Crowe, FBI</p> <p><b>Room: Topaz</b></p>	<p><b>Med Tech and Medical Methods: Patentability Requirements at the EPO</b></p> <p><i>Speaker:</i> Astrid Young, EPO</p> <p><b>Room: Turquoise</b></p>	<p><b>Streamlining Legal Operations: Onboarding, Workflow &amp; Workload</b></p> <p><i>Speakers:</i> Liz Fortier, Lucid Peter Rebuffoni, Schwegman</p> <p><b>Room: Sapphire</b></p>
11:45 – 12:45 PM	<b>Lunch - Plymouth Pre-Function / Plymouth Ballroom A</b>		
<b>Session 3</b>			
12:55 – 1:50 PM	<p><b>Taking Your Brand Beyond U.S. Borders</b></p> <p><i>Speakers:</i> Pamela Huff, Schwegman</p> <p><b>Room: Topaz</b></p>	<p><b>Subject Matter Basis at the EPO: Avoiding Invalid Priority Claims and Added Subject Matter Rejections</b></p> <p><i>Speakers:</i> Bryn Williams, Schwegman Chris Gabriel, EPO Nathalie Baptiste, Schwegman</p> <p><b>Room: Turquoise</b></p>	<p><b>Tackling Invention Disclosures</b></p> <p><i>Speakers:</i> Mary O'Malley, eBay Tim Christman, Schwegman</p> <p><b>Room: Sapphire</b></p>
<b>Session 4</b>			
2:00 – 2:55 PM	<p><b>Patent Assignment Considerations Within the U.S. and Under the PCT</b></p> <p><i>Speakers:</i> Bradley Scheer, Schwegman David Black, Schwegman</p> <p><b>Room: Topaz</b></p>	<p><b>2:00 - 2:30 PM: Updates &amp; News from the EPO</b></p> <p><b>2:30 - 2:55 PM: Introduction to Oral Proceedings</b></p> <p><i>Speakers:</i> Alexander Gardiner, EPO John Collins, Schwegman</p> <p><b>Room: Turquoise</b></p>	<p><b>Improving Patent Filing Procedures &amp; Systems</b></p> <p><i>Speakers:</i> Mary O'Malley, eBay Peter Rebuffoni, Schwegman Russ Slifer, Schwegman</p> <p><b>Room: Sapphire</b></p>
<b>Session 5</b>			
3:05– 4:30 PM	<p><i>Go to Track II for Mock Trial.</i></p>	<p><b>Mock Trial: Unveiling the Mysteries of Oral Proceedings at the EPO</b></p> <p><i>Speakers:</i> Alexander Gardiner, EPO Astrid Young, EPO Bryn Williams, Schwegman Chris Gabriel, EPO John Collins, Schwegman Nathalie Baptiste, Schwegman</p> <p><b>Room: Plymouth Ballroom A</b></p>	<p><i>Go to Track II for Mock Trial.</i></p>
4:30 – 6:00PM	<b>Networking Event - Restaurant</b>		

**Breakroom available all day in the Turquoise & Sapphire Pre-Function Space  
Please remember to sign in for CLE credit**



# Track I: Global IP Strategies

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## Session Descriptions



### **Session 1: Top Five IP Interactions with GDPR**

Are you losing sleep over the upcoming General Data Protection Regulation (GDPR) to be enacted on May 25 by the EU? In this presentation, we'll explore what in-house and outside counsel need to know about privacy and data security, and their impact on trade secrets, IP registrations and your inventors.

*Speakers:*

*Liz Fortier, Lucid, LLC*

*Mark Stignani, Schwegman Lundberg & Woessner, P.A.*

### **Session 2: FBI Case Files: Protecting Your Critical Information**

Critical information can look different in every organization. We will discuss threats to the various forms of critical information, such as economic espionage, and common ways this information is stolen. Using case examples, we will look at the importance of detecting and responding to potential or actual loss of critical information. We will also provide ideas for enhancing IP protection risk assessment and posture.

*Speaker:*

*Shena Crowe, Federal Bureau of Investigation*

### **Session 3: Taking Your Brand Beyond U.S. Borders**

Despite recent global issues, cross-border trade continues to grow. While globalization has benefited multinationals, it has also positively affected the fortunes of small and medium-sized businesses. Now, more than ever, companies require a global protection strategy for their trademarks. This presentation will examine international trademark filing strategies, as well as common pitfalls in trademark practice, and country-by-country tips.

*Speaker:*

*Pamela Huff, Schwegman Lundberg & Woessner, P.A.*

### **Session 4: Patent Assignment Considerations within the U.S. and Under the PCT**

In recent years there has been an upward trend in issues with assignment of rights contracts in patent law. There have been cases where an assignment to an employer was not considered valid when relying on an underlying employment agreement. Additional issues have arisen when an assignment from the employee/inventor did not actually occur when the employment agreement was not in compliance with the Supreme Court case of *Stanford University v. Roche Molecular Systems, Inc.* Further issues include attempting to use US-based employment agreements as assignment documents outside of the US. We will explore how to overcome these issues and issues with improperly executed or incomplete assignment documents where rights are not transferred to the Applicant prior to a PCT Application being filed.

*Speakers:*

*Bradley Scheer, Schwegman Lundberg & Woessner, P.A.*

*David Black, Schwegman Lundberg & Woessner, P.A.*

# Track I: Global IP Strategies

## Speakers



**Bradley Scheer**

Senior Attorney, *Schwegman Lundberg & Woessner, P.A.*

Bradley has considerable experience in technical litigation support and preparing and prosecuting patent applications in a range of technologies, including semiconductor device physics, semiconductor processing, semiconductor equipment, integrated circuits, videoconferencing, and medical devices. Brad has over 15 years of research and development, engineering, and management experience prior to becoming a patent practitioner.



**David Black**

Principal Attorney, *Schwegman Lundberg & Woessner, P.A.*

David maintains a diverse practice with an emphasis on portfolio development and due diligence. In his time as an electrical engineer, David designed low voltage analog circuits and digital electronic circuits for Telex Communications, Inc. and later, for a small hearing aid manufacturer. At the Schwegman firm, David has distinguished himself by providing strategic patent services for sophisticated clients including many academic institutions.



**Liz Fortier**

Vice President & General Counsel, *Lucid, LLC*

Liz has more than 20 years of in-house legal experience representing a variety of technology companies and is currently Vice President and General Counsel at Lucid, LLC.



**Mark Stignani**

Analytics Chair & Firm Compliance Officer, *Schwegman Lundberg & Woessner, P.A.*

Mark has patent experience in various technology areas, including software, information systems, mobile devices, computer hardware and design, telecommunications, and mechanical. His practice includes prosecution, post-grant proceedings, patent and portfolio analysis, freedom to operate, patent strategy and planning and strategic counseling. Prior to joining Schwegman, Mark served as an Assistant General Counsel for Thomson Reuters for over ten years.



**Pamela Huff**

Principal Trademark Attorney, *Schwegman Lundberg & Woessner, P.A.*

Pamela's practice includes the development of creative and strategic planning for protecting brands in the United States and throughout the world. These strategies are implemented through domestic and international searches, trademark filings, and continued portfolio management. Pamela plays a key role in advising companies on how to achieve their business and branding objectives and with brand enforcement, including assisting clients with disputes and resolutions.

# Track I: Global IP Strategies

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## Speakers Cont.



**Shena Crowe**

Special Agent, *Federal Bureau of Investigation*

Shena Crowe is a Special Agent with the FBI in the Minneapolis Division. She is the Strategic Partnership Coordinator, engaging academic and business leaders to better understand and respond to the modern threat environment. Shena started as a Special Agent in the FBI in 2002 in the San Francisco Division. Her work has included counterintelligence, counterterrorism and cyber investigations.

# Track II: European Patent Practices

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## Session Descriptions



### **Session 1: Differences and Parallels in Computer Implemented Inventions (CII) at the EPO and the USPTO, Post-Alice**

Under the European Patent Convention (EPC), for a computer-implemented invention to be patentable, a technical problem must be solved in a novel and non-obvious manner. For this presentation, we will discuss the schemes, rules and methods for performing mental acts, playing games or doing business, and programs for computers. We will also review the approaches used by U.S. patent examiners and the US courts, as well as provide practical solutions and tips for drafting EPO compliant application.

*Speakers:*

*John Collins, Schwegman Lundberg & Woessner, P.A.*

*Piers Blewett, Schwegman Lundberg & Woessner, P.A.*

### **Session 2: Medical Technology and Medical Methods: Patentability Requirements at the EPO**

With the rapid advancements in high-tech medical solutions and the push towards personalized medicine, the IP landscape in Europe is changing drastically. Over the past 20 years, medical technologies have been the leading category in new EPO patent applications, but under Article 53, medical methods that are directed to surgery, therapy or diagnosis are not patentable. For some inventions in medical technology, it is not easy to determine whether they encompass a medical method and at times it is impossible to draft an application on a device without relating to the method. In this presentation, we will explore these obstacles and the additional requirements needed for medical inventions to be deemed patentable

*Speaker:*

*Astrid Young, European Patent Office*

### **Session 3: Subject Matter Basis at the EPO: Avoiding Invalid Priority Claims and Added Subject Matter Rejections**

The EPO has a notoriously strict approach when considering the basis for priority and amendments. These strict standards can lead to denial of priority claims and ultimately loss of rights. Allowability of amendments is also critical since an unallowable extension of the subject-matter can later become a ground of revocation as in the infamous “inescapable trap”. This presentation will provide practical tips on how to avoid pitfalls when filing a European patent application based on U.S. priority applications. We will also show how to draft a patent application to pave the way towards allowable amendments.

*Speakers:*

*Bryn Williams, Schwegman Lundberg & Woessner, P.A.*

*Chris Gabriel, European Patent Office*

*Nathalie Baptiste, Schwegman Lundberg & Woessner, P.A.*

### **Session 4: Updates & News from the EPO & Introduction to Oral Proceedings**

In this session, our EPO examiners will discuss the latest news and updates including new structures, fees, the European Patent Convention and recent improvements. John Collins will also give an overview on the oral proceedings mock-trial that will take place in Session 5.

*Speakers:*

*Alexander Gardiner, European Patent Office*

*John Collins, Schwegman Lundberg & Woessner, P.A.*

**MC for Track II:** *Albert Kayeck, European Patent Office*

# Track II: European Patent Practices

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## Session Descriptions Cont.



### **Session 5: Mock Trial: Unveiling the Mysteries of Oral Proceedings at the European Patent Office**

The bulk of the examination process of obtaining European patent applications is conducted in writing. However, if the Examining Division has not been convinced to allow the application after one or more rounds of the written procedure, they may summon the applicant to an Oral Proceeding to discuss the matter. Although there is no obligation to attend, Oral proceedings can sometimes provide a good opportunity to overcome objections and explore the allowability of various amendments with the Examining Division. In this session, we will conduct a mock oral proceeding of an European Patent Office case, including interactive participation from the audience.

*Speakers:*

*Alexander Gardiner, European Patent Office*

*Astrid Young, European Patent Office*

*Bryn Williams, Schwegman Lundberg & Woessner, P.A.*

*Chris Gardiner, European Patent Office*

*John Collins, Schwegman Lundberg & Woessner, P.A.*

*Nathalie Baptiste, Schwegman Lundberg & Woessner, P.A.*

***This session is for all tracks.***

# Track II: European Patent Practices

## Speakers



### **Albert Keyak**

Attaché to the United States, *European Patent Office*

Albert is the European Patent Office Attaché to the United States. He previously served for four years as the United States Attaché to Latin America, based in Rio de Janeiro, Brazil. Mr. Keyack began his career in at a boutique patent law firm in Philadelphia where his practice included both patent prosecution and litigation. He has also practiced in general practice law firms and served as in-house counsel for both large companies and start-ups in Silicon Valley.



### **Alexander Gardiner**

Senior Examiner/Directorate Advisor, *European Patent Office*

Alex graduated from Aberdeen University in Scotland. After working on oil platforms as a telecommunications engineer and radio operator, he joined the EPO at the end of 1990, working first in Munich, then in The Hague for 10 years before returning to Munich in 2007. Starting off in fields such as analogue amplifiers as well as computer bus and database systems, his focus since 1997 has been on computer implemented inventions in the area of business methods and the internet.



### **Astrid Young**

Examiner, *European Patent Office*

Astrid, a German national, has worked for 17 years as an examiner at the European Patent Office (EPO) in Munich, Germany. Currently she is works in the team of 'Medical Use', concerned mainly with search, examination and opposition work in the medical field. In 2014 and 2015 she worked as an assistant in the Boards of Appeal in the field of pharmaceutical chemistry, especially second medical use, where she assisted Appeal Board members in appeal cases.



### **Bryn Williams**

UK Principal Attorney, *Schwegman Lundberg & Woessner, P.A.*

Bryn is a chartered and European patent attorney, a European trademark attorney and a European design Attorney. Based in the UK, Bryn's practice is primarily mechanical engineering with clients in the FMCG, medical device and oil and gas sectors. He also has significant experience in successfully managing multijurisdictional patent litigation. Bryn entered the patent profession in 2002 after working as a senior engineer in the food and tobacco industries, and subsequently as a commercialisation manager at the University of Glasgow.



### **Chris Gabriel**

Examiner, *European Patent Office*

Chris is a Munich based EPO Patent Examiner. He is of Dutch nationality and holds a university degree in electrical engineering. Prior to joining the EPO in 2002, he worked for several Dutch companies in the field of data communications. He designed data networks, provided consultancy, managed design and implementation projects, coordinated network support, and was involved in ITU standardization.

# Track II: European Patent Practices

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## Speakers Cont.



### **John Collins**

UK Principal Attorney, *Schwegman Lundberg & Woessner, P.A.*

John has considerable experience of proceedings before the European Patent Office, including oppositions and appeals and also has experience in litigation both in the UK and the USA. His expertise lies in electronics and particularly in the field of software, Internet and business method patents both in Europe and the US. John is a member of the Chartered Institute of Patent Attorneys (CIPA) Technology Committee and the CIPA Parliamentary Committee.



### **Nathalie Baptiste**

European Patent Attorney & US Patent Agent, *Schwegman Lundberg & Woessner, P.A.*

Nathalie has significant experience in drafting and prosecuting patents relating to software and business methods and has written and prosecuted patent applications in a range of technical fields including, cloud computing, cybersecurity, wireless networks, video content delivery, Internet of Things, UI technologies, semiconductor devices, electronics, mobile telecommunications, Internet-based technologies, power and radio-frequency engineering, optics, and optical networks.



### **Piers Blewett**

Principal Attorney, *Schwegman Lundberg & Woessner, P.A.*

Piers is a former Chief Patent Counsel (International), Vice President and associate General Counsel at Kimberly Clark Corporation. His practice includes strategic IP counseling, patent prosecution (US and foreign), patent validity, infringement and clearance analysis and opinions, global patent litigation, and IP due diligence work.

# Track III: Strategic IP Management

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## Session Descriptions



### **Session 1: The Role of Artificial Intelligence in Docketing Your IP**

When it comes to high-volume prosecution, having a quality patent docketing system at is essential. Over the last several years, there have been major developments in automating IP docketing to increase accuracy and efficiency while to reducing costs. In this presentation, we will explore a case study on the evolution of IP docketing and provide tips to tackle key docketing issues.

*Speakers:*

*Milena Higgins, Black Hills IP*

*Zhakalazky Carrion, Schwegman Lundberg & Woessner, P.A.*

### **Session 2: Streamlining Legal Operations: Onboarding, Workflow & Workload**

Over the last decade, there has been a rapid growth in the role of legal operations within corporations and law firms. Legal operation teams are being strategically assembled to bring greater innovation and efficiencies, allowing attorneys to spend more time on practicing law. Along with overseeing budgets and staffing, legal operation managers are also being relied upon for knowledge management, facilitating globalization efforts, and integrating new workflow technologies. This presentation will bring together in-house and outside counsel to discuss these evolving changes and provide suggestions for widespread adoption.

*Speakers:*

*Liz Fortier, Lucid, LLC*

*Peter Rebuffoni, Schwegman Lundberg & Woessner, P.A.*

### **Session 3: Tackling Invention Disclosures**

A common challenge for many companies is determining how to make the patent process part of the company culture and efficiently capture the company's innovation. An effective invention disclosure program is the first step of the process. If you have properly prepared invention disclosures, key inventive features are far less likely to get missed and the patent application drafting process will be faster and less expensive. Join this presentation to learn the key steps and tips on running an effective invention disclosure and patenting program.

*Speakers:*

*Mary O'Malley, eBay*

*Tim Christman, Schwegman Lundberg & Woessner, P.A.*

### **Session 4: Improving Patent Filing Procedures & Systems**

The introduction of electronic filing systems has improved the speed and transparency of filing documents with many patent offices around the world. However, due to the rapidly increasing trend of electronic filing, investment in associated applications and user accounts has become a necessity. For this presentation, U.S. and foreign office filers and the former Deputy Director of the USPTO will discuss problems solved by electronic filing systems and the demand to stay ahead of the curve that these systems create for law firms and IT departments.

*Speakers:*

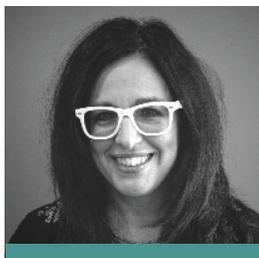
*Mary O'Malley, eBay*

*Peter Rebuffoni, Schwegman Lundberg & Woessner, P.A.*

*Russ Slifer, Schwegman Lundberg & Woessner, P.A.*

# Track III: Strategic IP Management

## Speakers



### **Liz Fortier**

Vice President & General Counsel, *Lucid, LLC*

Liz has more than 20 years of in-house legal experience representing a variety of technology companies and is currently Vice President and General Counsel at Lucid.



### **Mary O'Malley**

Patent Program Manager, *eBay, Inc.*

Since 2005, Mary has been the patent program manager at eBay, where she is responsible for patent procedures, best practices, and day-to-day operations. Prior to that, Mary was a paralegal for both law firms and corporations. Mary also taught patent prosecution for paralegals at Santa Clara University and West L.A. College.



### **Milena Higgins**

VP of Operations & Director of Artificial Intelligence, *Black Hills IP*

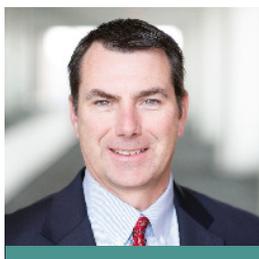
Milena's career has taken her from high energy physics to biophysics, patent law, legal knowledge engineering, and now Artificial Intelligence and Operations. With more than 20 years of experience in unconventional technology roles, she is an expert at translating between technical and non-technical people. Milena has a Ph.D. in Physics and a Masters in Management of Technology. She is a registered patent agent and a certified scrum product owner.



### **Peter Rebuffoni**

Legal Processes Manager, *Schwegman Lundberg & Woessner, P.A.*

Peter has been at Schwegman since 2003 and manages operations within the legal department. Peter's duties include development and implementation of firm best practices, integration of technology and IT solutions, analyzing prosecution metrics, and overseeing legal support staff.



### **Russ Slifer**

Principal Attorney, *Schwegman Lundberg & Woessner, P.A.*

Russ served as the Deputy Under Secretary of Commerce for Intellectual Property and Deputy Director of the United States Patent and trademark Office for the last two years. As Deputy Director, Russ managed all of the day-to-day operations of the USPTO. He was also the first Director of the Rocky Mountain Region Patent Office prior to his appointment as Deputy Under Secretary of Commerce serving as the agency's primary liaison with the innovation community in the Rocky Mountain Region.

# Track III: Strategic IP Management

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## Speakers Cont.



### **Timothy Christman**

*Principal Attorney, Schwegman Lundberg & Woessner, P.A.*

Timothy transitioned from an electrical engineering career to a legal career at Schwegman in 2007, eager to help Schwegman's clients protect their ideas. Since then, having had the privilege to work with Schwegman's broad and diverse range of clients, Tim has handled intellectual property matters for concepts ranging from the incremental to the revolutionary. Tim assists his clients through activities such as patent drafting, acquisition, and supporting diligence.



### **Zhakalazky Carrion**

*Docketing Manager, Schwegman Lundberg & Woessner, P.A.*

Zhakalazky finished law school in Mexico and passed the bar exam in 2004. Since starting with the Schwegman firm in 2005, Zhakalazky has been part of four different departments in the firm. She started as a receptionist, then moved to the U.S. case management department, then was promoted to U.S. paralegal and finally moved to the docketing department. Since July 2013, Zhakalazky has been managing the docketing department. Among other responsibilities, the docketing team deals with a variety of transferred-in applications, from a few to thousands of files at a time.



# Day 2

April 11, 2018

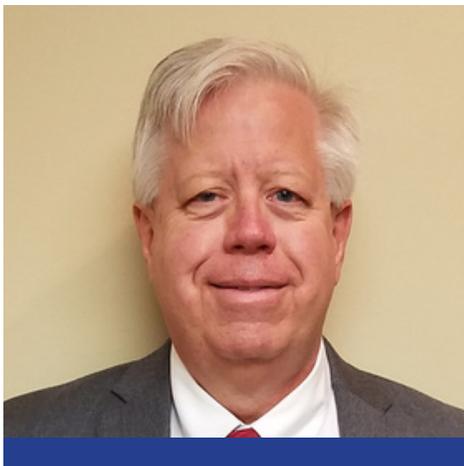
# Advanced PCT Training

Agenda: Wednesday April 11, 2018

Time	Activity	Room
8:00 AM - 9:00 AM	<b>Registration</b>	Plymouth Pre-Function
9:00 AM - 10:15 AM	<b>Part I - Advanced PCT Training</b>	Plymouth Ballroom
10:15 AM - 10:30 AM	<b>Break</b>	Plymouth Pre-Function
10:30 AM - 12:00 PM	<b>Part II - Advanced PCT Training</b>	Plymouth Ballroom
12:00 PM- 1:00 PM	<b>Lunch</b>	Restaurant
1:00 PM - 2:15 PM	<b>Part III - Advanced PCT Training</b>	Plymouth Ballroom
2:15 PM - 2:30 PM	<b>Break</b>	Plymouth Pre-Function
2:30 PM - 4:30 PM	<b>Part IV - Advanced PCT Training</b>	Plymouth Ballroom

*Please remember to sign in for CLE credit*

## Speaker



### **Carl Oppedahl**

*Partner, Oppedahl Law Firm*

Carl Oppedahl is a partner in Oppedahl Patent Law Firm. He also serves as an adjunct professor at University of Denver School of Law, teaching Advanced Patent Law. He served for many years on the faculty of the Practising Law Institute's Patent Bar Review Course. Carl frequently speaks on intellectual property subject matter, including lectures in continuing legal education (CLE) programs, and has many publications on the topic.

Carl earned a bachelor's degree with a double major in physics with honors and mathematics with honors from Grinnell College. After graduating, he was co-awarded the Linn Smith Prize for Excellence in Mathematics. Carl went on to earn a law degree from Harvard Law School and is now a member of the Oppedahl Patent Law Firm. He has written and prosecuted numerous patent applications in electrical engineering, computer software system, and mechanical areas and is an active computer programmer.