




LAKHANY LAW
Award-Winning Trademark Law Firm



The Revamp

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OVERVIEW



	Module	Topic	Speaker(s)
WEEK 1 Boss of Myself	1	Introduction + Overview	Sonia Lakhany
	2	Searching with TESS	Sonia Lakhany & Rachael Dickson
	3	Searching with Markify	Sonia Lakhany
	4	Office Hours/ Tutoring	Sonia Lakhany
	5	Recap/Group Coaching	Sonia Lakhany
WEEK 2 Boss of Myself	6	The Application Process	Sonia Lakhany
	7	Office Actions	Sonia Lakhany & Erik Pelton
	8	Hiring + Delegating	Sonia Lakhany & Tara Muccitelli
	8 (bonus)	Tools, Apps, and Software	Sonia Lakhany
	9	Renewals & Maintenance	Sonia Lakhany
	10	Best Practices/USPTO Loopholes + Recap/Group Coaching	Sonia Lakhany & Rachael Dickson
WEEK 3 Boss of an Empire	11	Social Media + Content Strategy	Nina Marinaro & Chandler Holsapple
	12	Conquer the Consultation: Proven Ways to Close More Trademark Business	Sonia Lakhany & Ticora Davis
	13	The Pricing Playbook: How to Set Your Trademark Fees and Get Paid What You're Worth	Sonia Lakhany
	14	Back-Office Breakdown: Systems + Processes, + Client Communication	Sonia Lakhany & Ticora Davis
	15	The Wow Factor: How to Build Referrals for a Steady Stream of Trademark Clients Without Advertising	Sonia Lakhany

WEEK 1

Boss of Myself



Included!

	Module 1	Module 2	Module 3	Module 4	Module 5
Topic	Introduction + Overview	Searching with TESS	Searching with Markify	Office Hours/Tutoring	Recap/Group Coaching
Speaker(s)	Sonia Lakhany	Sonia Lakhany & Rachael Dickson	Sonia Lakhany	Sonia Lakhany	Sonia Lakhany
Description	Getting started with trademarks	TESS techniques with an ex-USPTO Examiner	Reviewing a report and interpreting results	Free period	Mastermind Day!

WEEK 1



Topic

Introduction + Overview

Speaker(s)

Sonia Lakhany

Description

- Overview of the practice area
 - What is a trademark?
 - Various types of trademarks (word, design, sound, color)
- Other types of IP (trade dress, trade secret, copyright, and patent)
- Overview of Process:
 - Before Filing
 - USPTO Timeline
 - After Registration
 - Principal Register versus Supplemental Register
- Frequently asked questions by clients regarding trademarks
 - How to explain the application process
 - Rights and benefits provided by a Federal Registration
 - Rights provided by common law use of a trademark
 - How to choose goods and services for an application
 - Showing use of the mark "in commerce" and what that means.
 - Ownership of the mark and assignments.
- Frequently asked questions by new practitioners
 - Overview of the USPTO sites and systems:
 - TSDR Document Retrieval
 - TESS Search Fields and Functionality
 - TEAS Filing System
 - ETAS Assignment Filing System
 - ESTTA TTAB Filing System



WEEK 1



Topic	Searching with TESS
Speaker(s)	Sonia Lakhany & Rachael Dickson
Description	<p>Who is better qualified to teach searching with TESS than an attorney who used to be a USPTO Examiner? Rachael Dickson joins Sonia for this session on how to conduct trademark clearance searches and analyze results in the USPTO database.</p> <ul style="list-style-type: none">• How to search for similar marks using TESS<ul style="list-style-type: none">◦ Common search parameters to use with TESS<ul style="list-style-type: none">▪ Check word/phrase in all class search▪ Check word/phrase in exact and similar classes▪ Check for any similar designs▪ Check for translations

WEEK 1



Topic	Searching with Markify
Speaker(s)	Sonia Lakhany
Description	<ul style="list-style-type: none">• Using the Markify platform, plus promotional discounts.<ul style="list-style-type: none">◦ How to interpret results of search<ul style="list-style-type: none">▪ Likelihood of confusion to average consumer▪ Examination of marks as a whole▪ Review for descriptiveness or generic nature of mark.• How to assess risk and limit liability when drafting a search report• Tips for clearance searches for design marks<ul style="list-style-type: none">◦ Review of design descriptions◦ Review of USPTO design codes◦ How to interpret similar designs as a whole• Drafting an opinion letter<ul style="list-style-type: none">◦ Language to include<ul style="list-style-type: none">▪ Disclaimers to limit liability▪ Risk level▪ What was searched (USPTO only or common law uses of similar marks as well?)• How to explain search results to clients

WEEK 1



Topic	Office Hours/Tutoring
Speaker(s)	Sonia Lakhany
Description	<p>No agenda! It's just like old times when we were in school - drop in (virtually) to ask anything, get help, or just hang out and listen to others' questions. Sonia will be on Zoom the entire time, so no pressure!</p>

WEEK 1



Topic	Recap/Group Coaching
Speaker(s)	Sonia Lakhany
Description	<p>Our first recap! We'll go over anything that was confusing or needs explanation as well as put folks in the hot seat for some group coaching!</p>

WEEK 2

Boss of Myself



Included!

	Module 1	Module 2	Module 3	Module 4	Module 5
Topic	The Application Process	Office Actions	Hiring + Delegating Tools, Apps, and Software	Renewals & Maintenance	Best Practices/USPTO Loopholes + Recap/Group Coaching
Speaker(s)	Sonia Lakhany	Sonia Lakhany & Erik Pelton	Sonia Lakhany & Tara Muccitelli Sonia Lakhany	Sonia Lakhany	Sonia Lakhany & Rachael Dickson
Description	The full A-Z tutorial	Complications with the process	Free up your time and enjoy life again!	Post-registration filings	USPTO Insider Tricks + Mastermind Day!

WEEK 2



Topic

The Application Process

Speaker(s)

Sonia Lakhany

Description

- Confirming the use status of applications
 - For Intent-to-Use: confirm client understands that after the application is allowed, they will have 3 years to show use.
 - For Use: confirm client's dates of FIRST USE ANYWHERE versus FIRST USE IN COMMERCE and the difference between these two dates.
- What you will need for a design application
 - Clear, high quality JPEG of logo
 - Description of design and tips on drafting description
 - Color Claim vs. filing logos as black and white
- Tutorial of filing a 1(a) Use Based Trademark Application
- Tutorial of filing a 1(b) Intent-to-Use Trademark Application
- Guide to Additional Statements:
 - Disclaimed portions of marks
 - Names of individuals and required consents
 - Prior applications or registrations filed by applicant
 - Translations
- Choosing the goods and services for applications
 - TEAS Plus versus TEAS Standard.
 - Positives and negatives of each option
- Changes to the process per the USPTO



WEEK 2



Topic

Office Actions

Speaker(s)

Sonia Lakhany & Erik Pelton

Description

Sonia and Erik are back again! If you watched Office Action Boot Camp or purchased one of the workbooks, you already know how detailed and technical this session will get!

- Office Action responses to procedural and substantive issues
 - Common reasons for Office Actions
 - Required disclaimer of portion of mark
 - Refused specimen showing use
 - Amendments to listing of goods and services
 - Amendment to mark descriptions for designs
 - Likelihood of Confusion due to prior application or registration
 - Descriptiveness of mark
 - Claiming acquired distinctiveness
 - Geographically descriptive marks
 - Surname refusals
 - Ornamental refusals
 - Failure to function refusals
 - Genericness
- Coexistence and Consent Agreements
 - When they arise
 - How to approach opposing counsel
- Suspension Notices
 - How to proceed with prosecution of mark
 - Letters of Protest
 - How and when to file
- Examiner's Amendments
- Notices of Appeal
 - Breakdown of initial refusals, final refusals, and appeals
 - Guidelines to filing Office Action Responses
- Drafting a response
- Filing a response
- Suggested language for responses



WEEK 2



Topic

Hiring + Delegating

Speaker(s)

Sonia Lakhany & Tara Muccitelli

Description

You hear it all the time: "Work on your business, not in your business. Outsource more. Buy back your time." Here you are trying to be the Head of Marketing, Director of Human Resources, IT Specialist, Chief Financial Officer...oh, and let's not forget, the actual lawyer. No wonder you feel like you're going nuts!

- Thinking like a CEO
 - Re-frame your mentality and mindset to take yourself out of the equation and let your business run without you
- Time management
 - An organized way to manage your time and calendar without feeling overwhelmed or panicked
 - Tips and tricks to use your time efficiently and productively, and actually get more done in less time
- Hiring
 - Categorization of your administrative, marketing, financial, sales, and legal tasks so that you can make sense of what needs to be done and when
 - Hiring and interview criteria to select the candidate(s) right for you
 - Drafting SOP's/processes
 - Sample job description(s)
- Managing
 - An understanding of how to manage, oversee, and communicate with contractors and virtual assistants
 - Thinking about a workflow for your practice overall
- Troubleshooting
 - How to handle life when things go wrong



WEEK 2



Topic	Tools, Apps, and Software
Speaker(s)	Sonia Lakhany
Description	<p>Upon request, we added this additional session to talk about Sonia's recommended tools, apps, and software to make your practice run smoothly.</p>

WEEK 2



Topic	Renewals & Maintenance
Speaker(s)	Sonia Lakhany
Description	<ul style="list-style-type: none">• Managing deadlines• Timeline for post-registration filings• Explanation of 8/15, 8/9, filing only Section 8, and Section 71 filings• Responding to an audit request• Requirements for acceptable specimens• Excusable non-use and other special circumstances• Generating revenue beyond the registration• Assignments

WEEK 2



Topic	Best Practices/USPTO Loopholes + Recap/Group Coaching
Speaker(s)	Sonia Lakhany & Rachael Dickson
Description	<p>If you've ever wished you could talk to an insider at the USPTO, a newly-resigned Examining Attorney is the next best thing. Rachael Dickson is back, sharing best practices and loopholes she learned during her tenure at the USPTO.</p> <p>After, it's another Recap + Group Coaching session! We'll go over anything that was confusing or needs explanation as well as put folks in the hot seat for some group coaching!</p>

WEEK 3*

Boss of an Empire Week



***Must enroll in (or upgrade to) Boss of an Empire:**

	Module 1	Module 2	Module 3	Module 4	Module 5
Topic	Social Media + Content Strategy	Conquer the Consultation	The Pricing Playbook	Back-Office Breakdown	The Wow Factor
Speaker(s)	Nina Marinaro & Chandler Holsapple	Sonia Lakhany & Ticora Davis	Sonia Lakhany	Sonia Lakhany & Ticora Davis	Sonia Lakhany
Description	Establishing your brand and standing out from the competition	Proven Ways to Close More Trademark Business	How to Set Your Trademark Fees and Get Paid What You're Worth	Systems + Processes + Client Communication	How to Build Referrals for a Steady Stream of Clients Without Paid Advertising or SEO

WEEK 3



Topic	Social Media + Content Strategy
Speaker(s)	Nina Marinaro & Chandler Holsapple
Description	<ul style="list-style-type: none">• The future of law firm marketing• How to establish authority building your “personal brand”• How to stand out in a crowded space online• How to create “content” to educate potential clients & sell your services• How to use social media (Facebook, Instagram, and LinkedIn) for marketing that actually results in new clients• How to create content once and repurpose it multiple different ways so you don't always have to come up with new ideas

WEEK 3



Topic	Conquer the Consultation: Proven Ways to Close More Trademark Business
Speaker(s)	Sonia Lakhany & Ticora Davis
Description	<p>The class that one attorney famously said helped her close “\$15k of new trademark business in just 4 days!”</p> <ul style="list-style-type: none">• One of the most important aspects of owning a law firm is, of course, getting that retainer. After all...<i>what good is being a great lawyer if you can't sign clients?</i> This is where you need a solid sales skill set. How to explain the trademark process, how to answer common questions, and how to ensure you receive a YES at the end of the call!• A complete, proven system of handling incoming leads from start to finish, including the software, the processes, and the procedures• How to interpret a buyer's personality type within minutes into a consultation• What order to present information about the trademark process• What questions to ask your prospective clients to know immediately whether he or she is worth your time• Crafted answers to the most commonly asked questions by prospective clients• Time-tested responses to common objections/push back from prospective clients• How to handle the "price-shoppers"/"tire-kickers"• How to handle the inevitable "LegalZoom" questions• A proven word-for-word scripted framework to explain fees and convey the value we provide as lawyers• To charge or not to charge for consultations: the debate settled (and how to do it, if you choose to)• The best strategy for follow-up after the consultation is finished - how often, what to say, etc.• PLUS: Mock role-plays so you can hear how the process should go!

WEEK 3



Topic

The Pricing Playbook: How to Set Your Trademark Fees and Get Paid What You're Worth

Speaker(s)

Sonia Lakhany

Description

Learn how to set your trademark fees and get paid what you're worth!

The pillars of our client process leave very little room for error. After all, it doesn't matter how good of a trademark lawyer you are if no one hires you. Make no mistake - pricing your services and conducting your consultations is an art, not a science.

- Two types of pricing models for trademark services
 - Pricing Model A: Charge as you go, per stage of deliverable
 - What to include
 - Managing expectations
 - Pro's vs. Con's
 - Pricing Model B: Charge a larger "all-inclusive" retainer up front
 - What to include
 - Managing expectations
 - Pro's vs. Con's
- Implementation of pricing models
 - When to use Model A vs. Model B
 - Overcoming pricing objections from potential clients
 - Addressing common questions/misunderstandings
 - Adding and conveying value
- Creating urgency between the trademark process stages



WEEK 3



Topic	Back-Office Breakdown: Systems + Processes + Client Communication
Speaker(s)	Sonia Lakhany & Ticora Davis
Description	<p>One of the best parts of trademarks is how well the practice area lends itself to systems, processes, and templates. After all, the more automation you have on the back-end, the less manual work you (or anyone else) have to do...which means more time on the beach!</p> <p>Sonia and Ticora will do a deep dive covering each of their unique back-office set up, showing the tools, software, and standard operating procedures (SOP) they each have used to build and maintain 7-figure practices.</p>

WEEK 3

2 weeks TO TRADEMARKS

Topic

The Wow Factor: How to Build Referrals for a Steady Stream of Trademark Clients Without Advertising

Speaker(s)

Sonia Lakhany

Description

Whoa...an entire class? On building referrals?! Yup, you read correctly. Sonia has famously said she built her entire practice without spending a dime on advertising, so now you can learn her ways.

After all, clients that come from referrals are far better quality relationships than what you could pay or advertise for. Whether you are struggling to build up your clientele as a new solo or looking to refresh your current marketing, this session will help ignite some new ideas and help bring some new work through the door!

- *The Wow Factor* formula for leaving a lasting impression with clients that results in glowing testimonials and voluntary word-of-mouth referrals
- How to stay top of mind for referrals even when you're not around
- How to design an experience that keeps clients raving about you for years
- The one email template I've used to get 90% of potential referral sources to meet me for coffee



PLUS...

2 weeks TO TRADEMARKS

Don't forget: Every student receives access to the entire template collection which includes:

- Sample fee/engagement agreement
- Sample word mark opinion letter
- Sample design mark opinion letter
- Sample Statement of Use letter
- Sample publication letter
- Sample registration letter
- ...and more!

AND...every Boss of an Empire student still gets **two personal calls** with Sonia **after** the course!

Questions? Email sonia@lakhanylady.com.

Enroll now at www.TeachMeTrademarkLaw.com