



In-House Counsel Intensive

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**2025 LEGAL
SYMPOSIUM**

||| MAY 4-6 | WASHINGTON, DC



Challenges & Best Practices in Global Trademark Portfolio Management

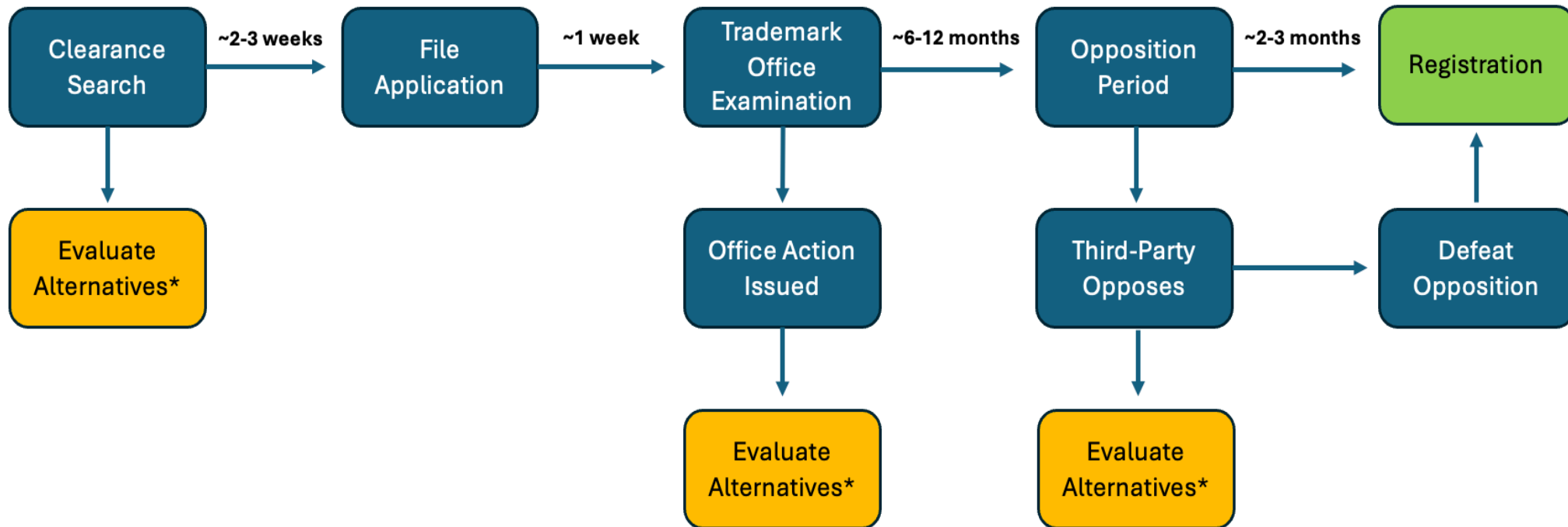
Alex Dourian
Counsel, Brands & IP
Hilton

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Trademark Registration Process



Portfolio Best Practices

- Whether you come from a large, established company with abundant resources or a bootstrap start-up, cost efficiency is always a primary concern when creating a strategy
- Considerations for establishing a cost-efficient strategy:
 - Set a budget
 - Focus your approach
 - General recordkeeping and information management

Portfolio Best Practices

Setting a Budget

- ***Know the Business***
 - Understand the product & brand strategy
- ***Set \$\$ Aside for Initial Screening***
 - Doing more upfront to ensure cost certainty
- ***Know the Jurisdiction***
 - Knowing general prosecution timelines can help forecast
 - Specific rules?
- ***Plan for Renewals***
 - Understand which marks are up for renewal in the coming year(s)

Focusing Your Approach

- ***Prioritize Certain Marks***
 - Choose ones most important to business
 - Idea: those which generate revenue/royalties for company
- ***Prioritize Certain Markets***
 - Choose few key markets to start and see how it goes
 - Utilize treaties and unions (WIPO, EU, etc.)

Recordkeeping/Info Management

- ***Maintain Adequate Recordkeeping***
 - Important in franchise context especially
- ***Utilize Technology***
 - Allows cost-efficient dissemination of info to business partners

Enforcement in High-Risk Markets

- Difficult to go after every instance of infringement
- Considerations for cost-efficiency:
 - Focus on products/services your company offers
 - Focus on key or emerging brands/products
 - Focus on key regions within the market

Protecting Brand Assets Online & On Social Media

- Similar considerations to previous slide
- Use tools/methods available:
 - Listening tools
 - Takedown requests
 - DMCA notices (copyright)
 - UDRP complaints for domain names



Legal Operations: Embracing Change Amidst an Evolving Business and Legal Landscape

Julie Hidalgo, Subway Head counsel

North America

May 6, 2025

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Agenda

- In-House Operational Challenges
- Legal Operations Role
- Opportunities for Continuous Improvement in Legal Operations
- Open To Roundtable Discussion

Today's In-House Legal Teams



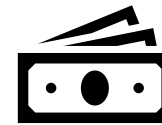
Legal team resources and bandwidth are lean



The business and legal landscape is continually in flux



Company initiatives move forward quickly and Legal teams must be in lock step



Higher level of scrutiny on legal spending



Implementation of effective legal operations practices

Role of Legal Operations

Create Strategic
workflows

Collaboration
with Business
Teams

Financial
Discipline and
Firm
Management

Management of
legal Matters

Contract lifecycle
management
(CLM)

Technology
Implementation

Knowledge
Management

Strategic Workflows

PROMOTE A CONSISTENT APPROACH TO LEGAL STRATEGIES AND PROCESSES

OPPORTUNITY TO CREATE EFFICIENCIES WITHIN THE LEGAL AND CROSS-FUNCTIONAL TEAMS

SERVE AS HELPFUL TRAINING GUIDES

Strategic Legal Workflows



Launch the discussion with relevant legal and non-legal team members

Fact finding Research
Team meetings
One-on-one meetings



Identify good, bad & ugly of current workflow or lack thereof



Foster collaborative discussion amongst participants



Define strategic approach and buy-in from participants



Produces workflow incorporating technology

Eliminates non-essential tasks
Addresses pain points
Creates a consistent approach

Strategic Legal Workflows

- Cross-Functional workflows
- Strategic and efficient workflows extend to cross-functional business and support processes
- Big opportunity for Legal team to gain efficiencies
- In-house legal teams are a valuable source of support to the business teams, but lines of support can get blurry
- Look out for the “business creep”

Collaboration with Business Teams

1

Stay current on the business teams' goals and objectives

2

Cultivate a collaborative environment built on trust and confidence

3

Provide brief learning sessions to help reduce risk and to empower business teams to raise legal concerns proactively

Financial and Firm Management



Collaboration with finance team to ensure all financial requirements met



Instill financial discipline within Legal Team for better management of overhead costs



Continuous search for cost-saving opportunities



Focus on reasonableness of firm rates and cost-effective services

Financial and Firm Management

There are several best practices that help the Legal teams stay on budget

- Track spending on pending legal matters
- Annual review of firm rates
- Thorough review of firm invoices
- Obtaining quotes from firms
- Use of budget and billing technology platforms

Legal Matter Management

Proper management of legal matters is crucial for effective legal operations. It provides:

Structure and documented timelines for handling legal matters

Visibility on legal team member bandwidth

Trends in litigation and transactional matters within the Company

Simplified preparation of legal matter updates to leadership

Contract Lifecycle Management (CLM)

An organized contract lifecycle process is essential to ensure that contracts are drafted, negotiated, executed and managed efficiently

- **Contract Lifecycle Management platforms are a high value investment providing:**
 - Self-service options for visibility into all phases of the contract lifecycle and easy access to contracts
 - Better time-management for the legal team, with focus on drafting and negotiating.
 - Post-execution tracking for renewals
 - Reporting and Analytics

Technology Implementation

Implementation of technology drives efficiencies in many areas including:

- ▶ Project management
- ▶ Billing and firm management
- ▶ Collaboration and communication
- ▶ Contract management
- ▶ Legal matter management
- ▶ Artificial intelligence



Knowledge Management

Technology
training

CLE and other
educational
opportunities

Documented
workflows for
consistency and
training

Final Thoughts

- Effective legal operations must be a focus and the foundation for every in-house legal team to provide quality support to their company.
- No one benefits from attorneys and paralegals spending time on tasks that are non-essential, can be automated, streamlined, or are better suited with another team.
- Implementation of a legal operations can feel overwhelming and time consuming. It's best to play the long game and make continuous improvements based upon both short term and long term goals.
- An in-house legal team's work on their operations will never be done. As technology advances and with the evolution of the business and legal landscape, it is necessary for legal teams to be in a growth mindset with a view toward continual optimization.