

**Program Title:** How I Prompt AI: Claim Charts and Tool Stacks

**Date:** June 18, 2026, 12:00 PM- 1:00 PM ET (60 minutes)

**Format:** Live interactive webinar (with real-time demonstrations and Q&A)

**Intended Audience:** Patent attorneys/agents, in-house IP counsel, licensing and litigation counsel, patent engineers/technical specialists

## **ABSTRACT**

Join us for Part IV of our Prompting series. The series features industry leaders sharing their insights, tips, and tricks for prompting foundational models. This session turns to two of the highest-leverage workflows in modern patent practice: AI-assisted claim charting and purpose-built tool stacks for multi-segmented patent prosecution. It is a practical session built specifically for patent prosecutors, in-house IP teams, and licensing counsel.

**Target Audience:** Patent practitioners (both law firm and in-house)

**Goal:** To educate the patent bar on effective AI prompting for claim charting and tool-stack sequencing across the patent lifecycle

**Title:** How I Prompt AI: Claim Charts and Tool Stacks - CLE Eligible

## **PANEL**

Moderated by Yuri Eliezer, CEO of Junior, our panel includes:

**Brett Hertzberg, In-House Counsel at Dolby — Claim Charting (product mapping, SEP analysis, and family analysis)**

- *Brett Hertzberg is IP Counsel with Dolby Laboratories. Brett A. Hertzberg is an Intellectual Property attorney, technology strategist, and former engineer with more than 30 years of experience at the intersection of innovation, law, and emerging technologies. As IP Counsel at Dolby Laboratories, he manages a global patent portfolio spanning thousands of assets and works closely with research, engineering, and business teams to develop intellectual property strategies in advanced technology areas including artificial intelligence, audio and video processing, software, and standards-based technologies. He also holds positions on Dolby steering committees on the use of AI and related tools in legal practice and patent operations, focusing on AI governance, intellectual property policies, and use of agentic AI in the Dolby organization.*

*Prior to Dolby, Brett held leadership roles in intellectual property consulting, patent portfolio management, and technology commercialization, including*

*...serving as Chief IP Counsel of the Invention Development Fund (IDF) and its later spinoff Xnova, where he managed a large law team supporting one of the world's most extensive patent investment portfolios. Earlier in his career, Brett was Managing Partner of the Seattle office of Merchant & Gould, advising leading technology companies on intellectual property portfolios and litigation. He was also a board member and past President of the Washington State Patent Law Association (WSPLA). Before entering law, Brett worked as an engineer designing microchips, digital systems, and software, including advanced neural network systems. He holds a JD from Touro College, dual MS degrees in Electrical Engineering and Electrophysics from NYU, and a dual BS in Electrical/Computer Engineering and Computer Science from Clarkson University. His unique combination of engineering expertise, legal experience, and AI-focused leadership provides a practical perspective on how organizations can leverage AI while managing innovation and intellectual property risks.*

**Craig Macy, Patent Attorney — Tool Stack sequencing for patent drafting (from claims to drawings)**

*Craig Macy is a partner at Macy & Peters PLLC, a business and technology boutique law firm operating out of Reno, Nevada. With over 25 years of experience at the intersection of law, technology, and business, Craig now serves as fractional general counsel to early-stage and emerging growth companies with critical IP portfolio development needs. He began his career in Silicon Valley in various management and executive roles at technology companies before transitioning to law, and has spent his career since helping founders and technology companies start, grow, and exit. For this webinar's purposes, it is worth noting that Craig's engagement with AI in a legal context dates to the 1990s, where his third-year law school thesis examined artificial intelligence and the law.*

**Yuri Eliezer, Patent Attorney; CEO & Co-founder, Junior**

*Yuri is the CEO and co-founder of Junior. As a U.S. patent attorney, he brings deep expertise in intellectual property and has spent his career guiding inventors, corporations, and research institutions in protecting their innovations. At Junior, he drives strategic direction and ensures the platform is built on real patent-practitioner insight, not generic automation. His leadership blends legal precision with forward-thinking innovation, anchoring Junior as a trusted partner for IP professionals worldwide.*

*Yuri has served as Managing Partner and Chairman of the Intellectual Property Practice Group at Founders Legal – A practice he co-founded at the Atlanta Tech Village – the nation's fourth largest incubator, where he served as an IP advisor for several years. Yuri is a lead inventor on multiple patents and was one of the few attorneys invited by the USPTO to provide technical training and industry insight at the Patent Examiner Technical Training Program. By the nominations of colleagues who have worked with him over the past several years, Yuri was*

*selected to the 2022-2025 Best Lawyers list and the 2020-2025 Super “Patent” Lawyer Lists, an award that is given to just 2.5% of attorneys. His recognition relates to his work in securing multi-million dollar patents for his clients – patents that have been tested through USPTO examination, re-examination, and litigation.*

*Yuri specializes in preparing, developing, and executing strategies for securing patents nationally and internationally. He focuses his work on developing an IP portfolio of high value and represents clients in licensing and acquisition deals to monetize their IP rights. He has secured patents, negotiated and executed domestic and international IP deals in the Software, Internet/Telecom, Computer, Electrical, and Medical Device fields. His team also prosecutes patents in the Mechanical, Aerospace, Biotech, and Pharmaceutical industries.*

*He continues his studies towards a graduate degree in Electrical and Computer Engineering has helped him serve technology companies of all sizes, including various startups, Microsoft, Cisco, Cox, AT&T, General Electric, Georgia Institute of Technology, and Coca-Cola.*

*Yuri’s technological knowledge, entrepreneurial expertise, and nuanced perspective on technological innovation have led him to found advanced technology companies in the hardware and software fields, and have attracted national media coverage, of the likes of NPR, CNN, and The International Business Times.*

#### **Gene Quinn, Founder, CEO – IPWatchdog**

*Gene Quinn is a patent attorney and a leading commentator on patent law and innovation policy. Mr. Quinn has twice been named one of the top 50 most influential people in IP by Managing IP Magazine, in both 2014 and 2019. From 2017-2025, Mr. Quinn has also been recognized by IAM Magazine as one of the top 300 IP strategists in the world.*

*Mr. Quinn founded IPWatchdog.com in 1999, and is currently Founder and CEO of IPWatchdog, Inc. According to IAM Magazine, Mr. Quinn “has reshaped the IP debate in the United States in a way that has forced policy makers to carefully consider the macroeconomic effects of IP law and its potential to drive innovation and economic activity.”*

*Regarded as an expert on software patentability and U.S. patent procedure, Mr. Quinn has advised inventors, entrepreneurs and start-up businesses throughout the U.S. and around the world. He consults with attorneys facing peculiar procedural issues at the Patent Office, advises investors and executives on patent law changes and pending litigation matters, and has represented patent practitioners before the Office of*

*Enrollment & Discipline.*

*Mr. Quinn began his career as a litigator handling a variety of civil litigation matters, and he has been a patent attorney for nearly two decades. He has previously taught a variety of intellectual property courses at the law school level, teaching courses such as patent law, patent claim drafting, patent prosecution, copyright law, trademark law and introduction to intellectual property at Syracuse University College of Law, Temple University School of Law, The University of Toledo College of Law, the University of New Hampshire School of Law, the John Marshall Law School (Chicago) and Whittier Law School. Since 2000 Mr. Quinn has also taught the leading patent bar review course in the nation.*

*Mr. Quinn is admitted to practice law in New Hampshire, is a Registered Patent Attorney licensed to practice before the United States Patent Office and is also admitted to practice before the United States Court of Appeals for the Federal Circuit.*

This panel will roll up our sleeves and show you exactly how to prompt state-of-the-art AI models to build defensible claim charts and to sequence a tool stack that carries work product from claims through drawings. You will see prompting demonstrations you can replicate on the job—with your clients’ consent, of course! We will discuss how to structure inputs so you receive reliable, citable outputs, how to chain tools so each step feeds the next, and how to keep confidential data private and siloed when working with public LLM endpoints.

Among other things, you will learn:

- Building claim charts that map claims to accused products and features (claim-to-product read-on).
- Using prompts to support standard-essential patent (SEP) analysis and essentiality mapping against a standard or specification.
- Conducting patent family analysis—comparing claim scope across continuations, divisionals, and foreign counterparts.
- Sequencing a multi-tool stack for prosecution: moving from claims, to specification, to figures and drawings.
- Structuring prompts so each stage of the tool stack hands clean, validated inputs to the next.
- Keeping confidential and privileged data siloed when chaining public LLM endpoints across a workflow.

## **MATERIALS:**

### **Program summary (educational focus)**

This skills-based program trains patent practitioners to competently use modern generative AI—specifically GPT and Anthropic models—to build claim charts and to design and operate multi-tool workflows for patent drafting and prosecution while preserving client confidentiality and trade secrets. Through live demonstrations, attendees will practice prompt patterns for mapping claims to products, performing standard-essential patent (SEP) and essentiality analysis, comparing claim scope across a patent family, and sequencing a tool stack that carries work product from claims to specification to drawings. The course also addresses ethical and professional responsibility considerations when using third-party AI tools (confidentiality, vendor oversight, and disclosure), techniques for siloing client data when using public models, and strategies for controlling context size to avoid over-disclosure when chaining multiple tools. No case law is taught; the focus is practical competence, confidentiality, and defensible workflow design.

### **Learning objectives (measurable outcomes)**

By the end of the program, participants will be able to:

- Construct structured prompts that map claim limitations to accused products and features and produce claim-chart-style read-on outputs.
- Apply prompting workflows to support standard-essential patent (SEP) analysis, including essentiality mapping against a standard or specification.
- Generate and evaluate prompts that compare claim scope within a patent family—across continuations, divisionals, and counterparts—to identify gaps, overlap, and over-breadth.
- Design a multi-tool stack and sequence prompts so that outputs flow reliably from claims, to specification, to figures and drawings.
- Validate hand-offs between tools so each stage receives clean, consistent, and citable inputs.
- Implement confidentiality-preserving patterns (pseudonymization, redaction, minimal-necessary context, zero-retention/vendor settings) when chaining public LLMs across a workflow.
- Explain and document a defensible firm policy for LLM use that addresses trade secret protection, vendor oversight, and recordkeeping across a multi-tool stack.

### **Ethics / professional responsibility justification**

This course meaningfully advances lawyer competence (ABA Model Rule 1.1, cmt. 8—technology) and confidentiality (Rule 1.6) in the context of third-party AI systems, as well as supervision of non-lawyer assistance and vendors (Rule 5.3) and client communication about risks/benefits (Rule 1.4). It provides concrete methods to prevent inadvertent disclosure of

client confidences and trade secrets when interacting with public LLMs and when chaining multiple tools, addresses vendor risk controls, and supplies checklists and written protocols. As such, portions of the program are appropriate for Ethics/Professional Responsibility credit in jurisdictions recognizing technology-ethics content. The balance of the program qualifies as General/Skills credit.

Requested credit categorization (jurisdiction-dependent):

- General/Skills CLE (core instruction and live demonstrations).
- Ethics/Professional Responsibility CLE (confidentiality, vendor oversight, technology competence).

Final credit allocation to be determined by each jurisdiction.

## **Sections**

The following segments will cover hands-on prompting techniques for claim charting and tool-stack sequencing across the patent lifecycle:

- Section 1: Claim Charting for Product Mapping
- Section 2: Standard-Essential Patent (SEP) Analysis
- Section 3: Patent Family Analysis
- Section 4: Tool Stacks for Multi-Segmented Prosecution — From Claims to Drawings
- Section 5: Validating Hand-offs & Defensible Workflow Design

## **Instructional methods & interactivity**

- Live demonstrations with GPT and Anthropic models.
- Guided walkthroughs where attendees follow step-by-step prompt templates on sanitized fact patterns.
- Polls and short quizzes to verify attainment of learning objectives.
- Facilitated Q&A with faculty.

## **Categorization note for state bars**

This session directly addresses (1) lawyer competence in technology-enabled practice, (2) client confidentiality and vendor oversight when using third-party AI across a multi-tool workflow, and (3) practical lawyering skills for claim charting, SEP and family analysis, and patent drafting and prosecution. Many jurisdictions recognize such training as General/Skills credit and, where applicable, Ethics/Professional Responsibility credit due to the confidentiality and supervision components.