Dear Zach,

We have spent some time testing your notice reporting software and are generally pleased with how it is working. It does a good job of extracting the correct information from office actions and assembling that information into the form of a notice reporting letter.

With that said, if we are to incorporate this software into our workflow, there are some kinks that need to be worked out.

1. The first is that office actions arrive as PDFs that are not OCR’ed, so we will have to do that by hand. It’s time-consuming and we see it as a barrier to adopting the software.
2. While it is a minor point, we would rather have the reporting letter pop up as an email. It’s kludgey to have to copy the text from a .txt file into an email.
3. The software could be faster—we know it only takes about a minute, but we feel like we are just sitting there staring at the screen waiting.

[Firm partner] has indicated that [his son] may pick this project up, so as a next step, let’s get together with him to make a plan that addresses our concerns. We can then begin the process of integrating the software into our workflow.

Best,

[Paralegal and Administrator]