



# Executive Brief

## Plain and simple terms;



## I have helped engineering teams;

- focus and articulate what new benefit that they can deliver to the market even if they already have a product concept defined.
- find solutions to the big problems and how to deliver on the customer focused benefits.

***That is where you generate value!***

*In the ideation area - I have over 100 US patents, 99 with shared inventorship*

## Plain and simple terms;

**Working as the liaison between engineering teams and patent counsel I ensure that we;**

- pull the ideas into workable statements for engineering to keep going and legal to begin searching and drafting.
- review searches and application drafts so to see that we have captured the design intent and it is customer relevant.
- reloop with inventors to embellished during application as we see how the competition is positioned to provide a enhanced description.
- leverage the power of continuations in the US to expand out coverage to block a competitor trying to flank the IP.

**Plain and simple terms;**



**I don't/can't replace patent counsel but;**

- **I can augment them and the processes from an engineer/inventor perspective cost effectively.**



# The Story for an *IP coordinator*

# Why an IP coordination Engineer?

Enhance current patent operations to enable:

- **Strategic idea development and capture**
  - Strategically work with trained innovation facilitator to draw out and refine solutions to complex problems and capture best solutions and ideas for IP consideration and clearance
- **focus of portfolio**
  - We like our ideas but do our patent claims provide extractable value
- **efficient/timely filing of patents**
  - AIA rewards the first to file

## Intellectual Property Portfolio - Desired Outcomes

Intellectual property is an intangible asset used as both an offensive and defensive tool to increase the value of your tangible assets.

How do we achieve this?

*... By carving out a customer solution space based on the strategic generation of Intellectual Property.*

**BENEFITS x TECHNOLOGY = SOLUTIONS**

$\vec{X}$  crossed with  $\vec{Y}$  yields  $\vec{Z}$ ...*a new direction*

## Intellectual Property Portfolio - Multiplicity Effect



**SOLUTIONS lead to VALUE**

**What problems have we solved for our customer?**

**What advantages have we provided them?**

**Generate profitable revenues from your IP through:**

- higher margins from protected innovations providing benefits that only you offer,
- leverage in our dealings with partners and suppliers,
- license royalties from players both within and outside your industry.



## IP Portfolio Development



### The Essential Elements

- **Drive R&D/development connection with Business Strategy**
- **Research potential portfolio gaps**
- **Develop invention portfolio to prevent competitors from entering your market**

# Setting up an IP plan



**First Question - what is the market position/identity that the brand should hold**

- **What is the intended market benefit for the device/system to deliver**
- **Extract some high level submissions to start a portfolio and explore new benefits**
- **Conduct initial landscape** (*Molecular Connections*)
- **Is this area open**
  - what problems have been solved
  - what problems have not been solved
  - what are the target areas for breakthrough performance
  - **Set up ideation workshops to get to breakthrough concepts**
- **Map target area concepts generated against competitive IP and Market positions**

# Executing an IP plan



With Market positions map set product/device/services vision for growth

- **Set up invention workshops for specific areas of interest**
  - may be *full workshop*<sup>1</sup> or *small team workshop*<sup>2</sup>
- **Overlay invention submissions upon market position map**
  - **Note US or multiple jurisdictions**
- **search of invention submissions**
- **Draft of applications**
- **Review applications for completeness of blockage and US continuation potential**
- **Cull portfolio to potentially free up IP spend**

1 - full workshop; 2.5+ days, 7 diverse attendees

2 - small team workshop; 0.5-1.5 days, 2-3 man team

## R&D Portfolio Development

- Drive R&D connection with Business Strategy
- Research potential portfolio gaps
- Develop invention strategy to prevent competitors from entering your market

## Program Idea Generation

- IP Integration and connection with new programs
- Forces program development team to think early about IP protection
- Connects program development team with existing patents

**Typical Work  
product - 4  
Areas of  
Support  
of  
BUSINESS  
STRATEGY**

## Organic Idea Generation

- Core Protection - Continuous support of core technologies that are important business foundations.
- Short Term Protection - 1 to 2 year organic portfolio development designed to keep the design fresh and continual in the market

## Next Phase/Future Idea Generation

- Beyond the Core Protection - Ideation and generation of concepts and solutions to common consumer problems.
- Drives Business Strategy to think beyond current market and into the next phase of business development.

# Working with an engineering team



## In full workshops, small groups or one on one

- **Use proven process to drive focused out of the box thinking and creation**
- **Help engineers/teams get concepts articulated on paper to enable effective novelty and right to use searches**
  - *Did we get the intent and structure properly communicated?*
  - *Are there other embodiments?*
  - *What does the competitive IP landscape look like?*
- **Facilitate embellishment of concepts to broaden protection**
  - *You may have a good solution but is it enough to protect the space?*
  - *Are our concepts breakthrough benefit or can we be leaped over?*

## **Working with in-house counsel & outside counsel**

- **Help inside counsel to evaluate protection opportunities**
  - Build initial landscape from competitive intelligence and other information
- **Help inside counsel to refine patent landscape**
  - Review and map novelty and right to use searches for informed business decisions on where to move forward
- **Review applications to enhance articulation of concepts**
  - With sufficient detailed description other avenues are blocked
  - Broaden protection and extend portfolio via continuation within US.