# IP management

Intellectual Property Teaching Kit

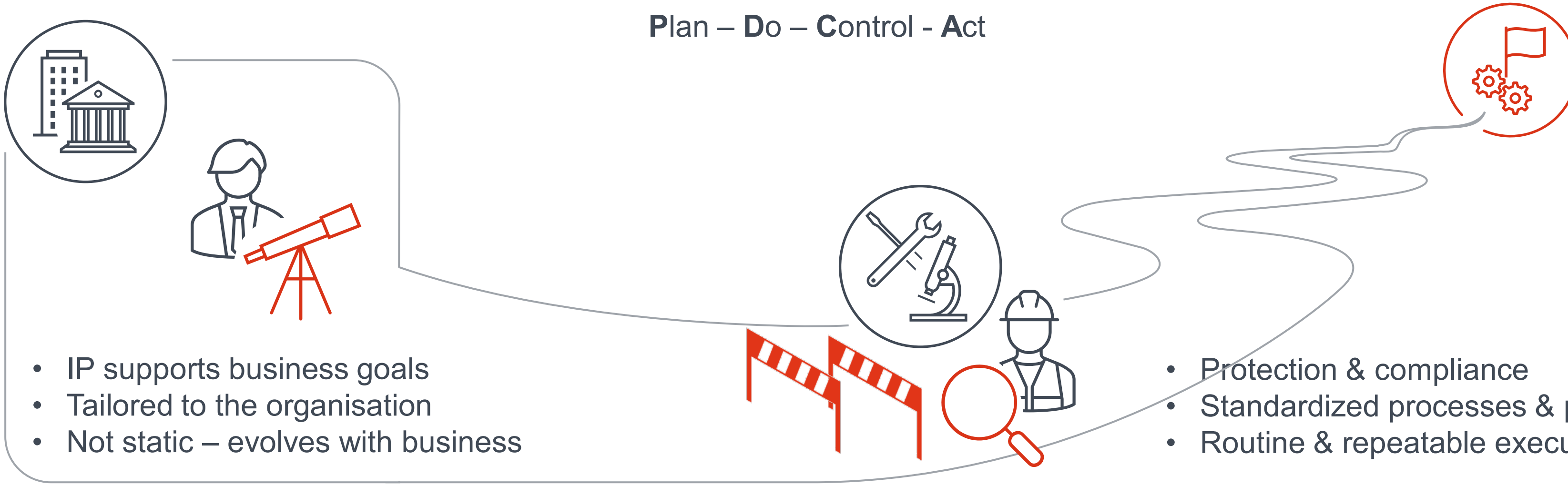
# ACHIEVING BUSINESS GOALS

**IP Strategy** – long-term perspective

systematic approach – **IP Management**

**Actual** **Target**

**P**lan – **D**o – **C**ontrol - **A**ct



- IP supports business goals
- Tailored to the organisation
- Not static – evolves with business

- Protection & compliance
- Standardized processes & policies
- Routine & repeatable execution

# THE FOUR MAIN PILLARS OF IP MANAGEMENT

Implementation

Tools, processes, recommendations, guidelines

→ increase in quality, integrity, transparency and efficiency

## Creating opportunities

- → Awareness creation
- → Teaching & training
- → IPR support
- → Technology scouting
- → Micro/seed-funding
- → Innovation awards

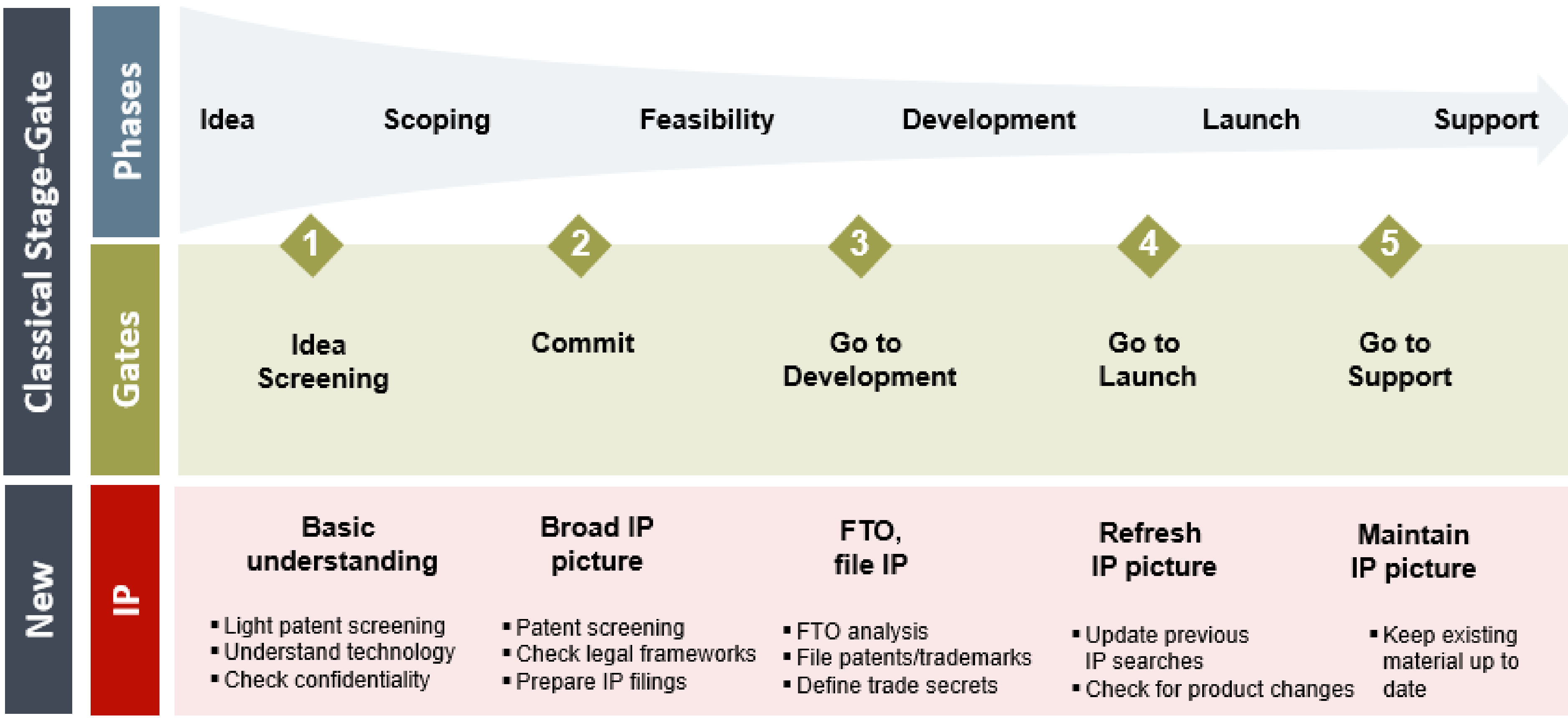
## Evaluation

## IP protection

## Exploitation

- → Business strategies
- → Licence agreements
- → Spin-outs
- → Assignments/sales

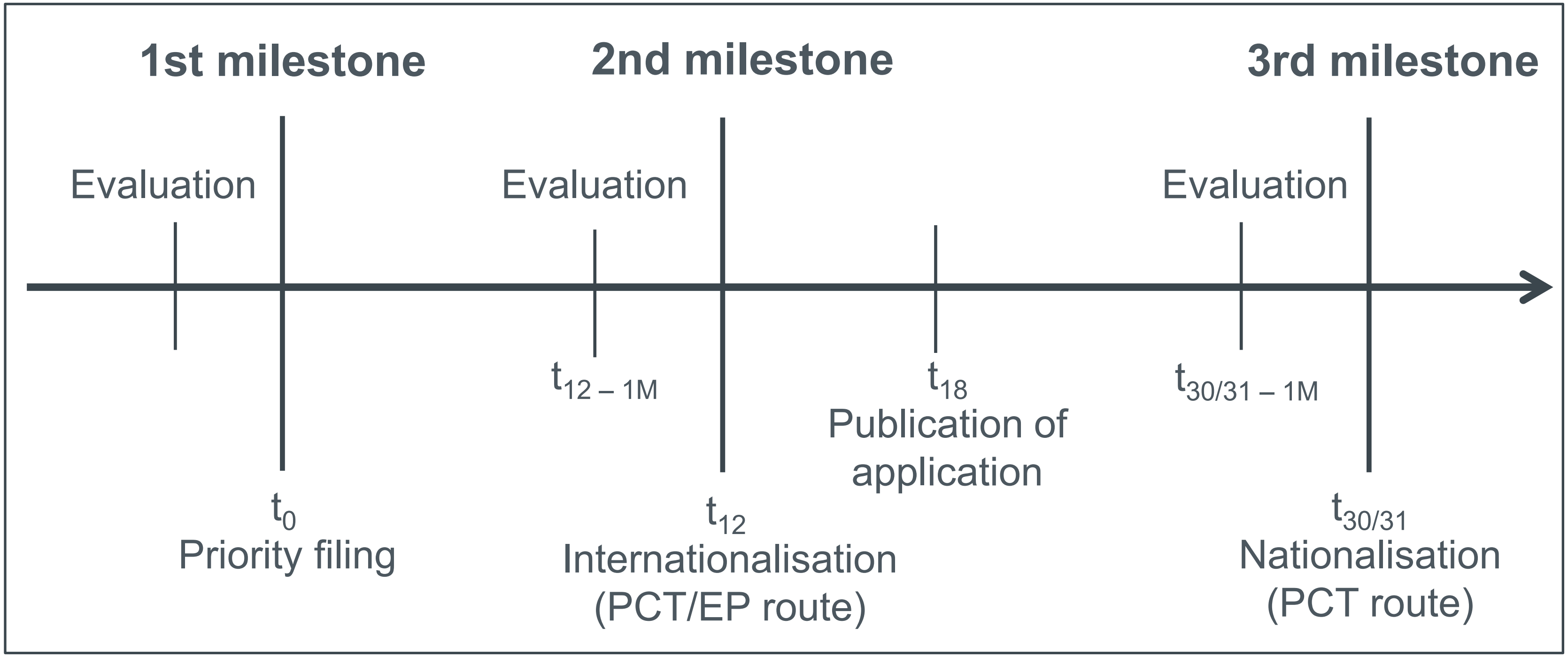
# Stage-Gate-Process with Integration of IP




www.epo.org/ip-professionals

https://lesi.org/wp-content/uploads/2024/04/8_hacklguillermin-dd-5152_rp-143-147-540c.pdf

# IP evaluation process




$t_0$ Patent priority filing: start of priority year

$t_{12}$ Deadline for internationalisation: 12 months after $t_0$

$t_{30/31}$ Deadline for nationalisation: 30/31 months after $t_0$ (PCT route)

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ISO 56005 – Innovation Management — Tools and Methods for Intellectual Property Management
DIN 77006 – Intellectual Property Management Systems — Requirements
https://link.epo.org/elearning/learning-resources-profile/en-standards-quality-ip-management.pdf

# People as enablers for intellectual asset management

**Technology Intellectual Assets (IA)** | **Brand Intellectual Assets (IA)**

**IP professional perspective:** Creation of IA → Assessment of IA → Protection of IA → Value generation with IA

**Decision-maker perspective:** Creation of IA → Management of IA → Transactions with IA

## Key players

- Your team
- Advisors
- Customers
  Collaborators
  Competition

## Key success factors

Expectation management

Pro-active communication

Alignment

## Cultural factors

- Organisational size
  Organisational stage
- Region
  Industry
- Individual personality

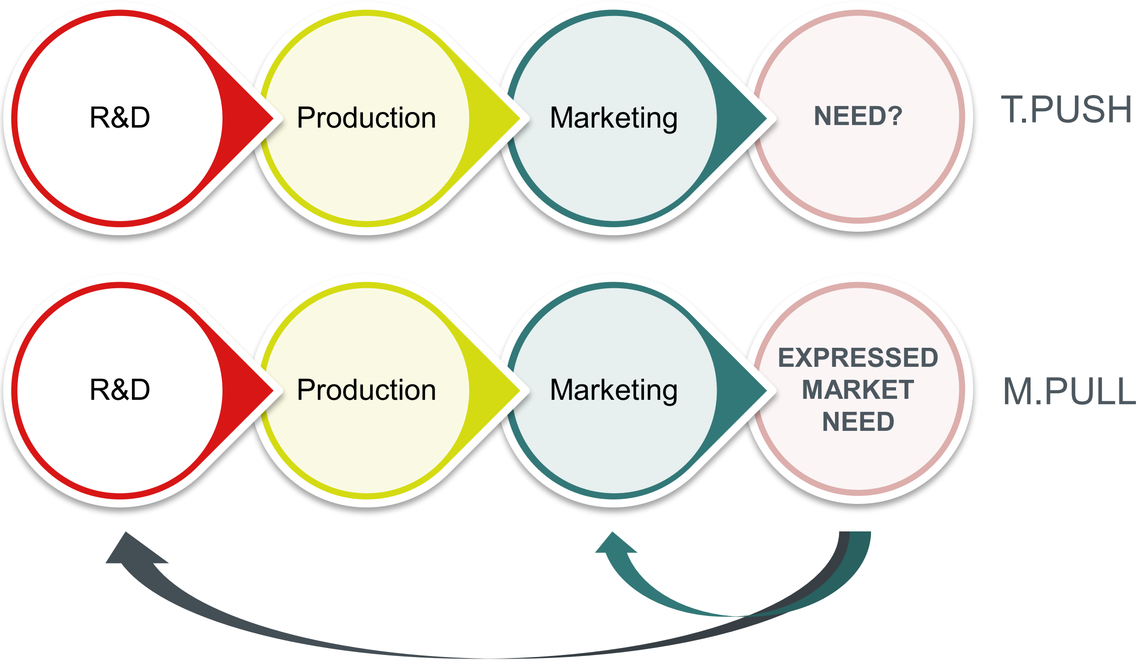
epo.org/business-decision-makers

https://lesi.org/wp-content/uploads/2024/04/1_-bereuterdvorakovagranerheidenpeters-dd-edits-5156_lp-94-107-540c.pdf

# Key takeaways

- **IP management is the execution of strategy**: It involves applying best practices to effectively implement your intellectual property strategy.
- **A holistic approach combines IP creation, evaluation, protection, and commercialization** in a coordinated manner.
- **Innovation is collaborative**: While everyone can innovate, no one can innovate alone.
- **Proactive planning ensures predictability**: Managing IP requires foresight and proactive timelines to stay ahead and avoid surprises.
- **People are the driving force**: Leadership must inspire understanding of *why* IP matters first, then *how* and *what* to do.
- **Recognition fuels motivation**: Establishing clear reward and recognition systems is essential to encourage ongoing innovation and commitment.

# TECHNOLOGY PUSH VS MARKET PULL




Graphic: ATIF EMRE DEMET & IZLEM SAHINKAYA

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# IP policies at organisations

- Recording of inventive concepts and results
- Preserving confidentiality of information
- Determining inventorship and ownership
- Publications
- Reporting of inventions
- Assessing third-party rights
- Reward system

# Tools and processes

| | | |
|---|---|---|
| ▪ Confidentiality | → | Non-disclosure agreements |
| ▪ Capture | → | Lab notebooks/work journals |
| ▪ Reporting | → | Invention disclosures |
| ▪ Protection | → | IPR (patent, design, copyright…) |
| ▪ Collaborations | → | IP provisions in contracts |

# Notebooks and work journals

- "Good practice" record of research or creative work

- Critical to addressing many concerns, including:
  - data to support patent applications
  - inventorship and ownership
  - data and procedures for regulatory purposes
  - contractual obligations
  - know-how relating to licence deals and IP assets of spin-outs

# The invention disclosure form

- Important document for universities and inventors

- Information requested is designed to help:
  - evaluate patentability and commercial potential
  - determine inventorship and ownership
  - assess possible third-party rights
  - provide information for patent attorneys (inventive step and novelty)

# Collaborations

- Definitions of IP used and created in the project
- How it will be managed
- Ownership and access rights
- Ownership and access to improvements to IP
- Who will file and prosecute patents
- Sharing of costs, risks and returns
- Terms for publications