

DEVELOPING INTELLECTUAL PROPERTY STRATEGIES AND PERFORMANCE METRICS

A Study of methods, roles and responsibilities, performance metrics, and best practices

IP leaders from many leading companies view developing plans and strategies as a vital activity toward overall business growth. Developing those plans and strategies enable stakeholders to establish a uniform perspective on how to achieve business growth goals as well as sustainable competitive advantages.

This *Developing Intellectual Property Strategies and Performance Metrics Study* confirms that intellectual property strategic relevance has increased and planning activities are more robust, compared to our prior study conducted in 2010. We find that organizational approaches to establishing intellectual property strategies are widespread; companies utilize an array of internal and external information sources to construct their intellectual property strategies. Additionally, the study shows that various IP stakeholders participate in developing intellectual property strategies.

In this comprehensive report, innovation-driven companies share their intellectual property strategy development and performance metrics practices. To ensure that this study looked at the most pertinent topics, we organized an advisory group of IP leaders representing a diverse set of industries. Based on their recommendations and ipPerformance's experience and knowledge, the study was designed to consider industry characteristics, importance of each intellectual property asset, internal company support and advocacy, strategy elements and success factors, competitive understanding and influences, intellectual property portfolio management, IP strategies integration with business planning and strategy, licensing strategies, and the use of performance metrics.

This groundbreaking report will assist you in evaluating how your company prepares intellectual property strategies. For example, this report details strategy structure and information sources, roles and responsibilities, key performance indicators, types of competitor information used, portfolio management decision criteria, and many other factors that impact intellectual property strategies (see Table of Contents below).

This report includes a thorough executive summary that provides key highlights and observations. The full report provides descriptive charts and more than 73 pages of detailed statistics.

Benchmark Report at a Glance

Sample Participants

Sun Chemical Corporation
Symantec Corporation
Cytec Industries Inc.
Zebra Technologies
Valmet Corporation

Number of Companies

33 Participants

Information Type

Graphics
Metrics
Ratios
Key Findings
Analysis by key operations factors

Report Length

Three Volumes
73 pages

Report Structure and Organization

Table of Contents – Summary

1. The Role of IP in Company Strategy & Culture
2. Technology and Competitive Insights
3. IP Strategy Development
4. Business Management Participation and Oversight
5. Performance Metrics
6. Licensing Strategy
7. Business & Organizational Data
8. Appendix: Noteworthy Analysis and Elaborations

Intellectual Property Strategies Development and Performance Metrics Considerations

What will you learn?

- What functions participate in the strategy development process?
- Who is the most senior person or people outside the legal department intimately familiar with the IP strategy?
- What performance metrics are reported to management?
- What performance metrics are recorded and used as key performance indicators?
- What performance metrics are benchmarked?
- Do the business strategy documents include intellectual property strategies?
- Who is responsible for intellectual property strategies?
- What information sources are used to construct intellectual property strategies?
- Who monitors competitive intellectual property activity?
- What are the key elements in an IP strategies document?
- How do companies value their intellectual property investments?
- How important is licensing to development plans?
- Is licensing a component of intellectual property strategies?
- Does competitor patent action influence company development plans?
- Do companies have an IP-focused person on an internal senior management committee?
- What information does the intellectual property department provide to business groups for developing their business plans?
- Do companies whose competitive advantage is driven by manufacturing place a higher level of importance on trade secrets?

Who Can Benefit From This Report

- Chief Intellectual Property/Patent Officers
- Chief Legal Officers/General Counsel
- Chief Financial Officers
- Chief Technology Officers
- Intellectual Property Directors
- Business Presidents

More on ipPerformance Group

ipPerformance Group, Inc. (www.ipperform.com) is the leading intellectual property advisory company. We enable our clients to apply best practices and measure IP performance by drawing upon our knowledge of more than 450 intellectual property management benchmarks, all from Global 1000 companies. Armed with this knowledge, you will be able to solve complex intellectual property business problems and measurably enhance your ability to build value, manage risk, and improve performance in an intellectual property-driven world. The following outlines some of our other offerings.

ipPerformance's assessments apply its extensive experience with high-performance organizations to provide an objective and powerful perspective on the leadership behaviors that will have the greatest effect on sustained intellectual property program performance.

Intellectual Property Management Program "Yard Stick" Review

The "Yard Stick" is a comprehensive assessment of your intellectual property asset management program. It includes evaluating policies, procedures, workflows, software, people, operational performance metrics (costs, cycle-time, value), training program, and stakeholder interactions. We provide an in-depth review of your operation, identify issues or concerns, and provide you best practices and a roadmap with improvement opportunities.

Intellectual Property Management Performance Scorecard Review

An **Intellectual Property Scorecard** is an effective performance metrics tool for communicating value, process efficiencies, and financial management to top management. The scorecard charts financial management, business alignment, portfolio management, risk management, people management, innovation management, and learning and knowledge growth. In addition, we offer workshops to help you develop a measurement program tailored to your unique organizational needs, and construct a scorecard that provides your organization with strategic and operational metrics to help guide business decisions.

Intellectual Property Center of Excellence (IP Knowledge Center)

The IP Center of Excellence is an intellectual property asset management intranet portal system and content solution. This online solution incorporates ipProcess Manager, our comprehensive and detailed intellectual property program policies, forms, and procedures based on best practices that are customized to conform to your company's environment. ipProcess Manager enables your organization quickly to establish robust, accessible, and documented controls for all aspects of your intellectual property program.

Intellectual Property Advantage: Portfolio Evaluation

ipPerformance will assist you to **organize, classify, and evaluate your IP portfolio**. Our methodology enables your organization to manage your assets better for value identification, cost reduction, litigation support, improved asset access and understanding, and for reporting and communications. It enables you effectively to understand your portfolio.

Intellectual Property Advantage: Process Review and Roadmap

ipPerformance works with you to evaluate current processes and objectives against best practices. We then develop a "should be" map that illustrates improvement opportunities that align with your

business strategy to create value, improve quality, and reduce costs. Your organization will benefit from our extensive experience applying best practices and understanding cultural change.

Intellectual Property Training for Stakeholders

ipPerformance Group offers an extensive line of online eLearning training courses on intellectual property. These courses will help your company's business and technology professionals develop the skills they need to create, protect, manage, and monetize intellectual property.

Our eLearning curriculum reflects a diverse set of intellectual property asset training courses. We cover everything from improving basic understanding of intellectual property to exploring strategic considerations of key stakeholders in areas such as marketing, business management, supply chain/commercial management, and technology (R&D).

Inventor Intellectual Property Attitude Assessment

Establishing and maintaining a strong inventor IP attitude and understanding is vital to inspiring innovation and gaining valuable invention idea submissions. ipPerformance will assist your company in its effort to obtain and understand factors that will motivate your inventor community to identify and disclose valuable key invention ideas. Moreover, this assessment enables you to identify bottlenecks and key areas for improvement that lead to an increase in valuable inventions and R&D's return on investment.

IP Management Software Selection and Return on Investment Evaluation

Selecting IP asset management software is not a trivial activity. Indeed, it can be an extremely complex process to match software function and capability to your company's needs. Applying a practical and methodical approach will enable you to avoid vendors that cannot fulfil your needs, and the experience of protracted delivery deadlines and inadequate deployment readiness. ipPerformance proprietary Software Solutions Request for Proposal (RFP) and selection tool is comprehensive with over 1,200 attributes. It enables you to prioritize your requirements and evaluate alternative solutions. We can also provide the additional service of walking you through the RFP process.

Strategy Development Workshop

Develop intellectual property strategies that enable your company to achieve business growth goals and sustainable competitive advantage. This one-day workshop has been developed to help intellectual property and business leaders develop and communicate clear IP strategies and tactics that are directly aligned with business strategy.

Drawing on ipPerformance advisors' extensive business and intellectual property experience, this highly interactive course uses lectures, case studies, group exercises, and classroom discussion to explore the foundations of strategic intellectual property. This workshop will provide you with our IP strategy planning guide, which includes an IP strategy framework, templates, techniques, performance metrics, and a perspective to help you develop strategic plans to excel in today's business environment.

ipProcess Manager

Establishing your intellectual property program standard operating procedures can be a time-consuming and complicated process. ipProcess Manager is a comprehensive intellectual property program resource with workflows, procedures, policies, forms, templates, agreements, and flow charts. Our guide covers invention submission, review and decision-making, inventorship, portfolio

management and inventory classification, agreement approvals, strategy development, foreign filing decisions, technology release, inventor reward, new product clearance, and handling unsolicited ideas. The ipPerformance ipProcess Manager is designed to help businesses of all kinds take control of their intellectual property asset management operations through consistent implementation of best practices.

Benchmarking Analysis

ipPerformance provides the largest off-the-shelf selection of intellectual property program best practices benchmark reports available. Applying this extensive repository, we can evaluate your program versus peers and best practices. Additionally, utilizing our extensive company network, we can conduct a company-tailored benchmark analysis that enables your organization to investigate specific topics of concern.

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