

OPTIMUS  
THE STRATEGIC PATENT SERVICE

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# Managing the People

Tony Wray



## The 4 commandments of Strategic Patent Portfolio Management:

1. Thou shalt know what you have
2. Thou shalt identify what you need
3. Thou shalt acquire what you need
4. Thou shalt divest what you don't need  
(to provide resources to support commandments 1,2,3)

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**Who** are the people?

**How** are decisions made?

**How** to communicate Portfolio Strategy?

**How** to decide on In-house vs. Outsourcing?

**How** to encourage innovation?

**How** to manage inventors (and others)?

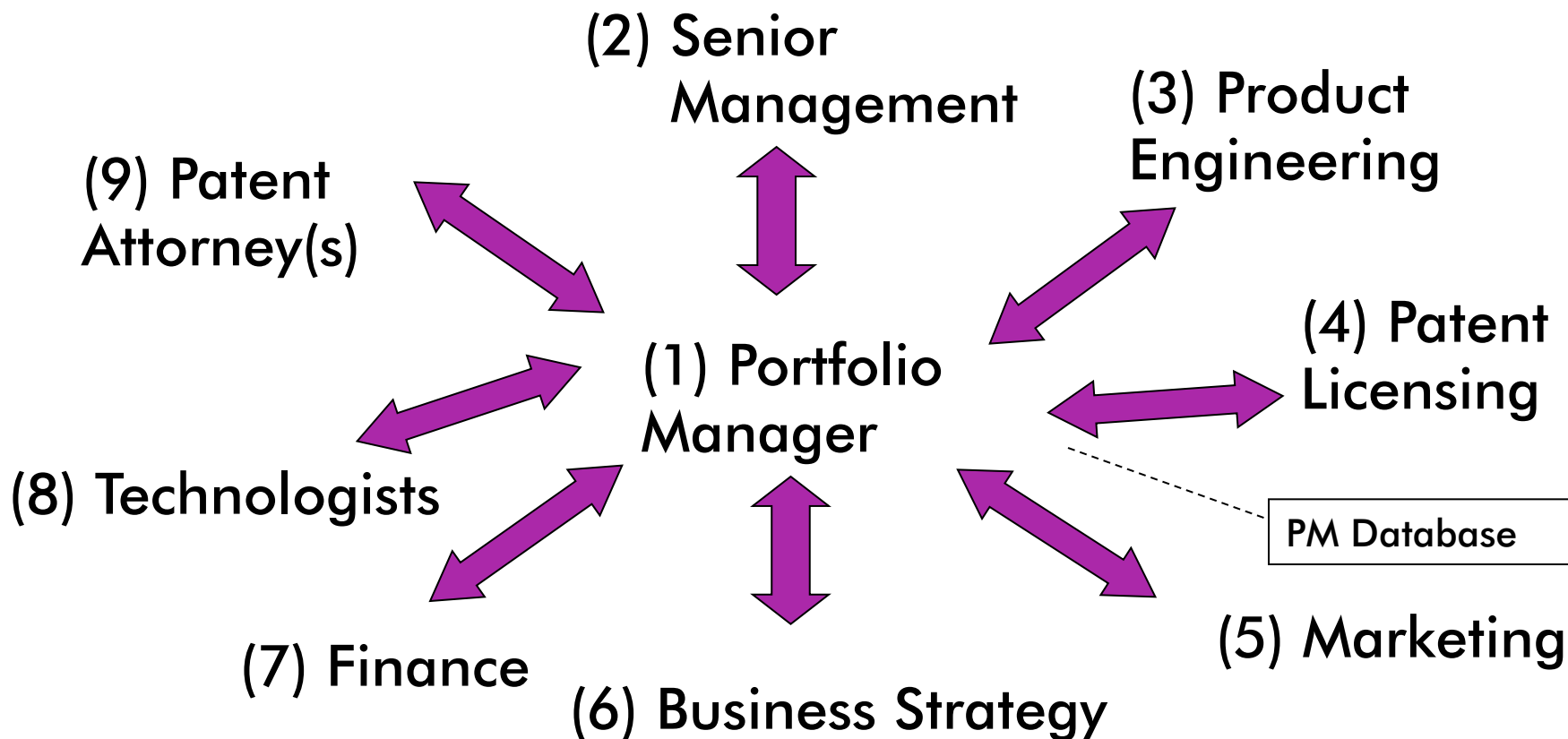


## The People?

Introduce the concept of:

An  
Integrated  
Portfolio Management Team

## Integrated Portfolio Management Team



## People Skill Set

Cross-section of 'personalities'

- › Optimists vs. Pessimists
- › Free-thinkers vs. Logical thinkers
- › Patent Experienced vs. Patent Novices
- › Range of technology backgrounds
- › Visionaries



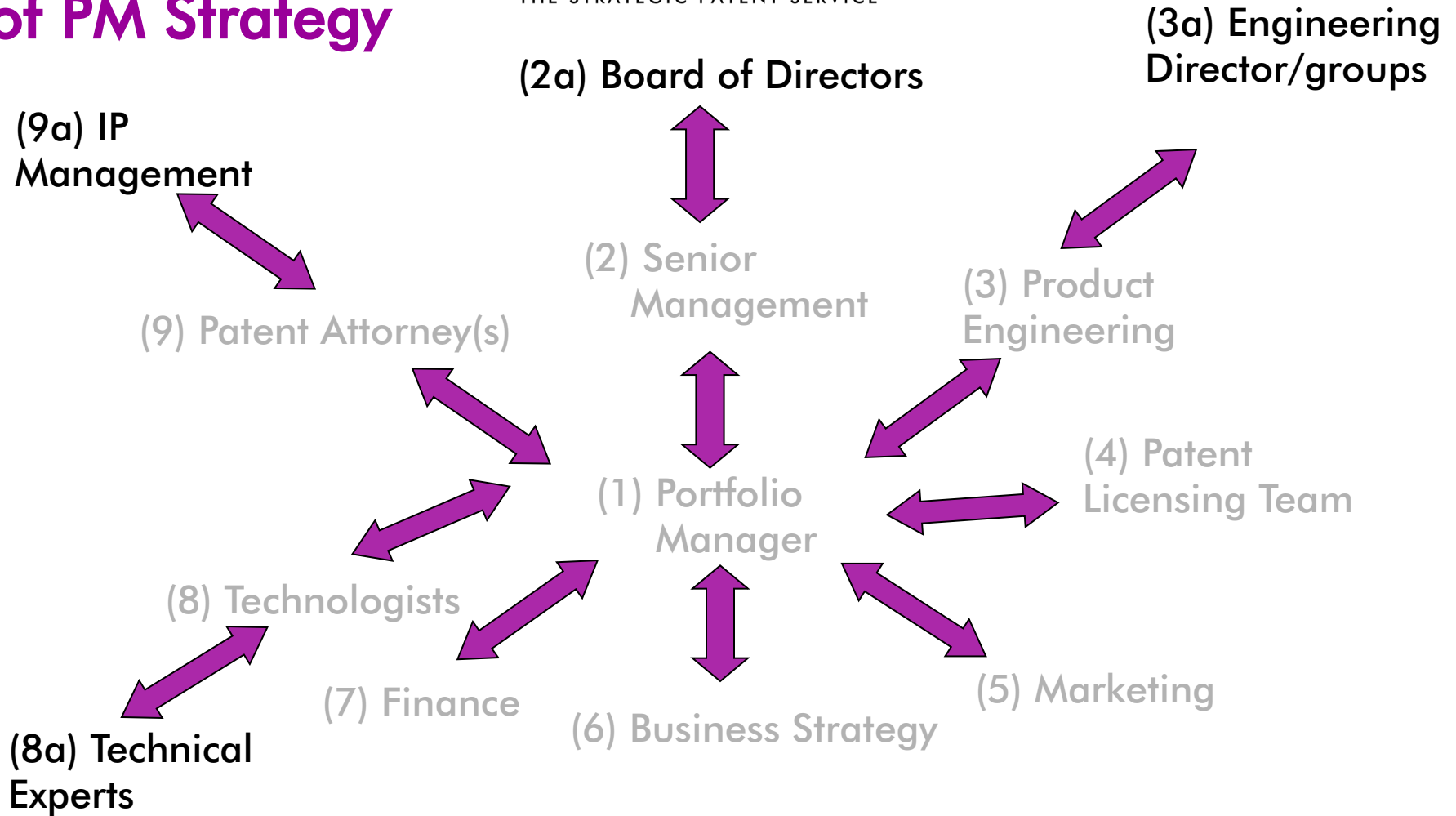
## Role of the Integrated PM Team

- › Formulating PM strategy
- › Communicating PM Strategy
- › Instigating PM projects/sub-groups

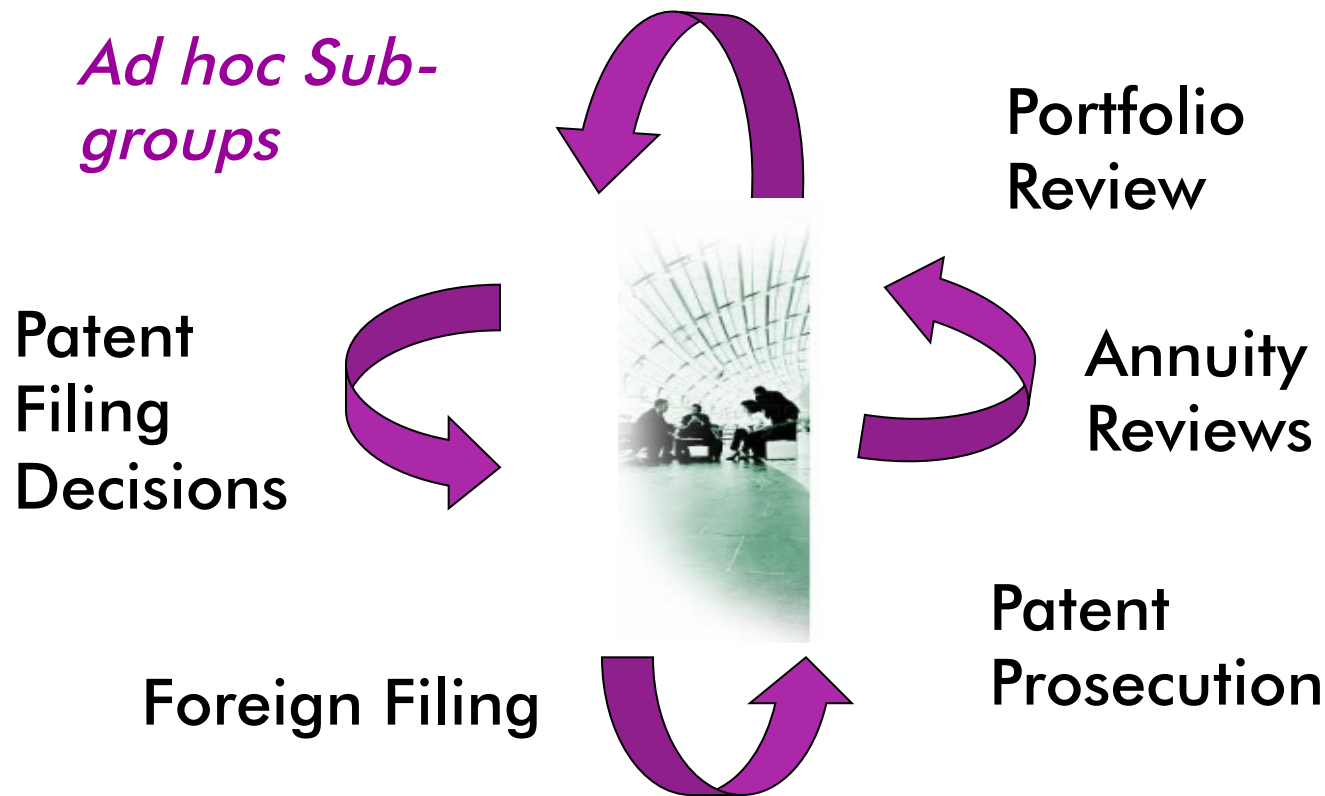




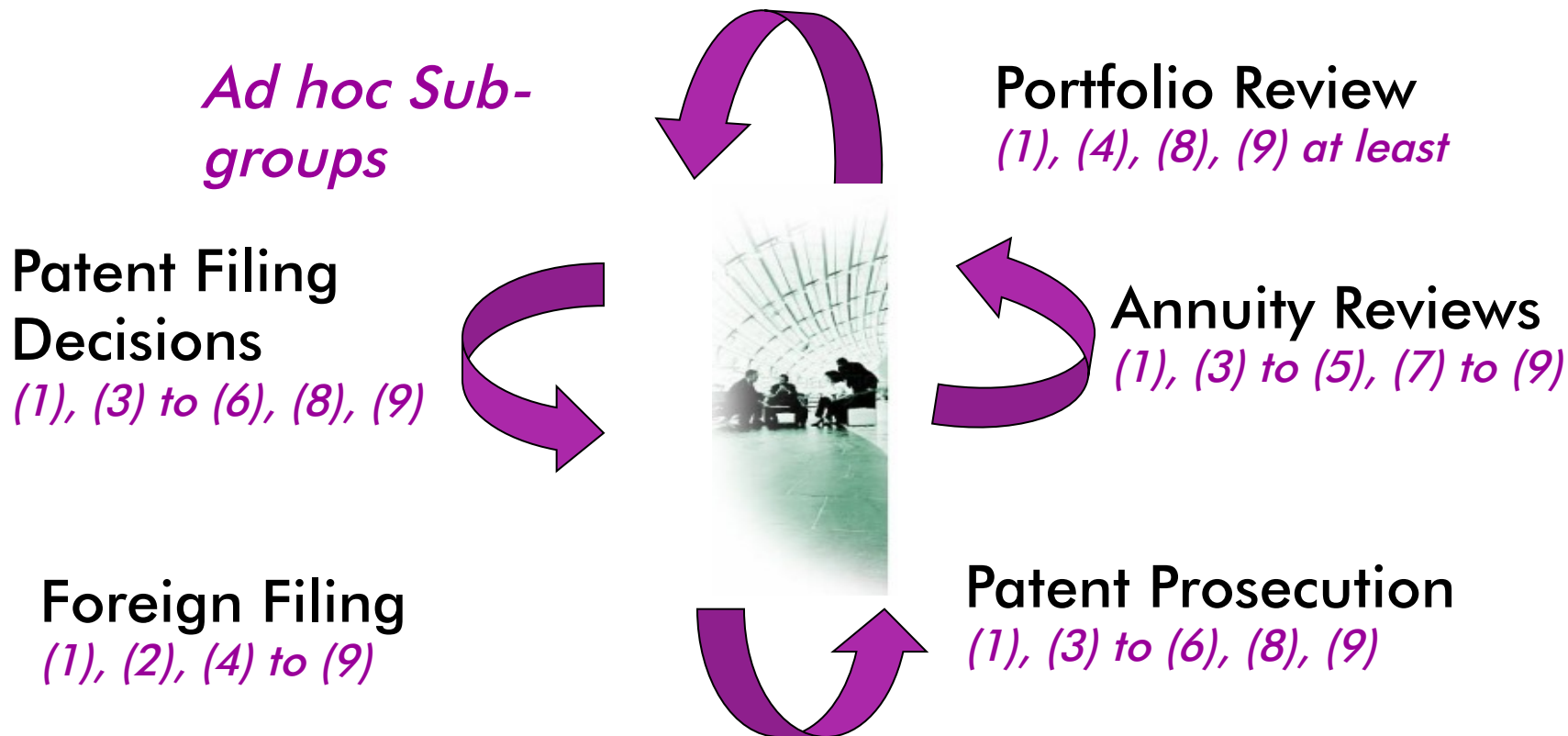
# Communication of PM Strategy



## Sub-groups of the Integrated PM Team



## Dynamic Membership of Sub-groups



## Ad-hoc 'Sub-groups'

- › **Innovation Encouragement**
- › **Competitor Profiling**
- › **Decision Criteria/ Priorities**
- › **In-house vs. Outsourcing decisions**



# Innovation Encouragement (1)

## Portfolio/Product-driven invention generation:

- › Brainstorming
- › Advanced Inventing
- › Product Reviews



**Invention  
Generation**

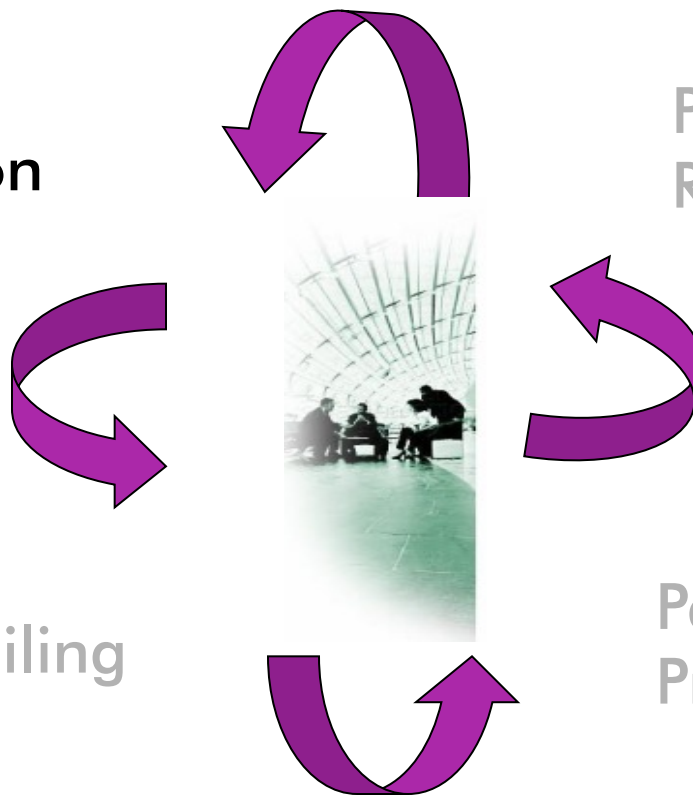
Patent  
Filing  
Decisions

Foreign Filing

Portfolio  
Review

Annuity  
Reviews

Patent  
Prosecution



# Innovation Encouragement (2)

## Inventor Incentives:

- › Financial Incentives
- › Peer Recognition
- › Organisation Award schemes



## Innovation Encouragement (3)

### Establish Best Practices:

- › Educate & Communicate
  - › Attorney sign-off
  - › Inventor Notebooks
- › Simplify systems
- › 'Open' decisions with feedback





## Ad hoc 'Sub-groups'

- › Invention Encouragement
- › Competitor Profiling
- › Decision Criteria/ Priorities
- › **Outsourcing Policy**



## Outsourcing Policy

### Possible outsourced functions:

- › Invention identification
- › Invention generation
- › Patent Drafting
- › Patent Prosecution
- › Patent Administration/docketing
- › Portfolio Management



## In-House?

### Pro's

- › Easier to integrate
- › Better Control of costs, work, priorities, etc.
- › Flexibility
- › Access to business
- › Access to technology

### Con's

- › Need the skill set
- › Internal Bureaucracy, real-time interrupts
- › Inflexibility!
- › Tunnel Vision
- › Infrastructure support

## Outsourcing?

### Pro's

- › Act on instruction
- › Ability to switch
- › Quality of work should be paramount concern
- › Access to specialists
- › Easier budget control

### Con's

- › Reactive not Proactive
- › Can they add value?
- › Lack of understanding of client's business
- › Not technology savvy
- › Cost

## In-house vs. Outsourcing

In an ideal world ...

skilled people (Attorneys, admin, etc.),

no cost constraints,

infrastructure support,

# In-house!

## In-house vs. Outsourcing?

In the real world ...

for most businesses ...

combination of

# In-house & Outsourcing

## Successful Portfolio Management requires ...

