



Tutorial 21 intellectual property



Understanding

DISCLAIMER

“Consider this tutorial as Bert & Ernie version managing intellectual property (IP). Please consult your IP representative.”

IP rights

“allow the creators or owners to benefit from their work or from their investment in a creation by giving them control over how their property is used.”

In this tutorial, we will zoom in on *managing intellectual property* and provide you tools to manage this very expensive and complex process * .

*acquisition and strategic choices out of scope , consult specialized companies (like [NLO](#))



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Understanding

Before starting*

- Review WIPO presentation about IP ([link](#)).
- Print your latest IP (if any).
- Print your current procedure & planning.
- Check dates of current IP.
- Arrange a meeting IP representative.
- Print latest minutes of your IP team (if any)
- Check if your current IP strategy is still up-to date.

* this may take some time so please schedule this in your agenda.



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Understanding

Create framework for IP management.

- Take your time to review your current IP strategy.
- Create business model for IP process..
- **Make a documented platform for IP.**
- **Create an IP register.**
- Determine which external IP firm can be consulted.



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Understanding

Take your time to review your current IP strategy.

- **Print your current IP strategy (if any).**
- **Describe your motivation for your current IP strategy.**
- **Make choices in which countries IP strategy is mandatory.**
- **Decide which manager of your company will be the cost owner.**
- **Create alternative IP protection for your product.**
- **Review your IP as part of your strategic plan.**



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Understanding

Create business model for IP.

- **Create a IP register***
 - initial cost.
 - cost to obtain IP (support).
 - cost of assigned IP.
 - maintenance & administration cost..
 - possible legal cost.
- **Link this register to your current sales and forecast.**
 - cost per product of product group/current delivery program.

*internal time and cost out of scope.



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Understanding

Make a documented platform for your IP records*

“Implications of IP can last for decades”.

- **Create factsheets for IP**
 - date, external reports and status.
 - required actions (if any) and acceptance.
 - do not use hyperlinks in your factsheet.
- **Create an IP logfile**
 - IP status.
 - follow actions
 - required actions (if any) and acceptance.
 - do not use hyperlinks in your IP log file.
- **Follow up during IP team.**

*consult your IP firm/consultant.



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Understanding

Create an IP communication register.

“you must communicate intellectual property”.

- Check your current way of communication of IP with your stakeholders.
- Check the communication process (if any).
- Check how you assure the content of your IP communication.
- Check your current IP communication in your database.
- Check your plan B, in case of miscommunication.



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Understanding

Determine which Patent Attorney must be involved.*

- **Check your choice and based on which criteria.**
- **Consult third parties (like branch organisation).**
- **Communicatie choice with relevant stakeholders.**
- **Follow-up during IP-team.**

*check Dutch Orde van octrooi gemachtigde ([link](#)).

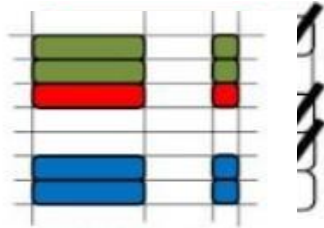


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Understanding

Managing IP (follow up and control)



Steps

- Install an IP team.
- Review running IP's and possibilities.
- Manage changes in your IP program.
- Review expiring dates.
- Assign & plan actions (output).

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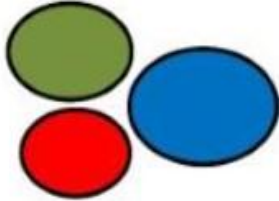
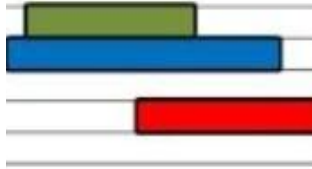


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Understanding

Managing IP program (follow up and control).



- **Communication.**
 - periodically with your relevant stakeholders about the review and follow up.
 - IP communication on product and internet .
- **Plan and execute individual review.**
 - based on IP register.
 - based on a trained and competence IP representative & support from your Patent Attorney firm



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Understanding

Follow up & records product approval



- **Follow up IP team.**
 - check results and usability actions.
 - plan & check follow-up activities.
 - inform management team about progress.

- **Records.**
 - IP documentation center.
 - management review.
 - IP team agenda, report & follow up.
 - competence IP team members.
 - records from your Patent Attorney firm.

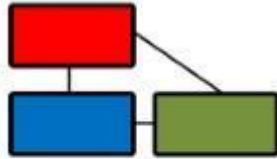
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Understanding



PROCEDURES /
INSTRUCTIONS

Create intellectual property procedure.

- Chooses standard procedure template.
- Describe activity steps and used documents.
- Save procedure in ISO procedures in tdkmoms folder.
- Connect the procedure to your log file (index).



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Understanding



Add intellectual property in your ISO plan & planning.

PLANNING



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Understanding

Finally Remember:

- **IP process is expensive and time consuming (budgeting).**
- **Make sure that you have a clear picture of your IP strategy.**
- **Calculate expected IP cost per product/per year.**
- **Check on a regular base if your business is in conflict with running IP's.**
- **Make sure that your “not protected IP” is connected to your business. (public evidence).**
- **What about a worst-case scenario.**