



Toward proactive, aligned and long-term management of innovation and IP

## Topics

Train your IP strategy skills  
in the romantic city of  
Heidelberg!

- Be more proactive, away from ad-hoc approaches
- DIPS Matrix: analyzing relevant facts, generating options for a strategic choice
- DIPS Methodology: making IP plans with a multi-disciplinary approach (competition mapping, SWOT, metrics, planning)
- Opportunity to work either on paper (forms) or with online tool
- Reapply the tools for direct practice depending on (client's) company maturity/readiness
- Gradual approach (current portfolio mapping, understand the business and management goals, etc.)

## Your Speakers



**Dr. Arnaud Gasnier**

CEO and Senior Consultant,  
Patentopolis BV



**Romano Beitsma**

Consultant,  
Patentopolis BV

## Aims and objectives

Do you need to set up an IP strategy plan? Do you need to convince executives of the plan? Our interactive course provides you with the necessary tools. After a systematic overview of IP strategy (options, value, content), our speakers give you two practical tools: (1) an IP Matrix and (2) a step-by-step methodology called DIPS (Design IP Strategy) to outline a strategic plan for IP (the emphasis is on patents). An online tool is also introduced to ease implementation. The IP Matrix is the starting point. The DIPS methodology provides techniques to map the competition and to benchmark the performance of your current IP portfolio. After this practical and hands-on course, you will be able to apply the IP Matrix and the DIPS methodology immediately to your daily practice and you will know how to set up, present, implement and monitor an IP plan step by step.

## Who should attend?

You are tasked with developing and implementing IP strategies? Then this course is designed for you. A minimum knowledge on IP topics, especially on patents is assumed. This course is especially interesting for those working in IP, patent, innovation, R&D and business development departments as well as patent attorneys from private practice, also acting as external/outsourced IP managers for their SME clients.

## What our participants say

- **Werner A. Roshardt, European Patent Attorney, Equity Partner, Keller & Partner Patentanwälte AG (Switzerland) – 17 December 2018:**  
‘I attended the Patentopolis strategy seminar 18 months ago and found the content very interesting and important. I have started IP-strategy discussions with several clients and we started corresponding projects. My experience is that it takes a ‘change of mindset’ for IP-Managers and CTOs/CEOs of SMEs to discuss on the IP strategy level. The insight I got from the Patentopolis seminar helped me to keep the discussions with the clients on track. Also, the projects with the clients helped me to improve the understanding of what they really need. Still, it takes a lot of time and patience to reach the goal of such strategy projects in SMEs. In that process, Patentopolis strategy seminar and tools are unique and I learnt a lot there to get to a practical useful end.’
- **Eugenio Souto Pampín, European Patent Attorney, IMEC (Belgium) – 17 July 2017:**  
‘Patentopolis course on IP strategy was up to my expectations and as defined during the first hour of the course. The DIPS® matrix and methodology is a very powerful toolkit, which helps to visualize how to capture value and where to invest budget and resources in areas which are relevant to the company. At the same time, it is a simple tool which can be practically implemented in my company and is effective for conveying relevant IAM aspects to managers. I very much enjoyed the course and particularly its hands-on exercise approach. Thanks to the course, I have now a more realistic view of what IP strategy is.’
- **Ramsvik Trond, Partner, European Patent Attorney, Onsagers AS (Norway) – 10 August 2017:**  
‘There is a real need for many companies to get a structured approach to IP strategy. That’s exactly what Patentopolis course on IP strategy offers’
- **Reino Savela, IP Counsel, ABB AB (Sweden) – 10 January 2017:**  
‘What I liked the most from this 2.5-day course on IP strategy is the methodology DIPS for strategy making since it is very practical. This Patentopolis methodology gives a path to follow where to start, as well as how to analyse data and interact with other functions during the planning phase and after.’
- **Dr. Markus Glänzel, Director IP Management, Evonik Nutrition & Care (Germany) – 10 January 2017:**  
‘IP strategy is essential for business success, and I don’t want to rely on just gut feeling or hope as a strategy. Therefore, it makes sense to follow an effective methodology like DIPS of Patentopolis, since this is a well-structured, clear and logical approach. Highly recommended!’
- **Rimma Pugatsch Shendelzon, IP Manager, Landa Corporation (Israel) – 9 January 2017:**  
‘This 2.5-day course on IP strategy is an important milestone for me and my company. The tools provided during this extensive course will allow me to apply the methodology DIPS of Patentopolis in IP strategy project for my company. I will recommend this course mainly to IP managers having limited IP experience with strategy-making. It gives a lot of materials on the methodology DIPS and also an opportunity for data crunching, which is exactly what I was looking for.’

## Your speakers

### Dr. Arnaud Gasnier

CEO and Senior Consultant, Patentopolis BV

Dr. Arnaud Gasnier is CEO, a Senior Consultant and Founder of Patentopolis BV specialized in training/certifications, solutions and consulting in the area of IP management. Arnaud has practiced globally in various IP (patents, trademarks) departments and in various roles (Patent Attorney, Licensing Associate, Portfolio Manager, Associate General Counsel, Assistant Director) for 20+ years, e.g. for Swatch, Philips, Dutch contract research organization TNO, and Adidas. He is the author of ‘The Patenting Paradox’ and regular speaker at global conferences and seminars especially in the area of strategic IP management. Arnaud is regularly awarded, recently with IAM 300 – The World’s Leading IP Strategists (2017, 2018).

### Romano Beitsma

Consultant, Patentopolis BV

Romano Beitsma is a Consultant for Patentopolis BV. He has over 25 years of experience in the field of IP, having worked at companies and patent firms, in Germany, The Netherlands and the United Kingdom.

## 1<sup>st</sup> day: 13:00 - 17:30

### IA strategy toolbox

- Fundamentals on IP management and strategy. Compare opportunistic vs. proactive. Key strategy models e.g. Porter
- Learn the DIPS Matrix as strategy-thinking tool to integrate business, innovation and IP
- Teamwork: apply the DIPS Matrix to actual cross-industry scenarios. Takeaways to reapply to own environment

## 2<sup>nd</sup> day: 09:00 - 18:00

### Strategy-making

- Build a strategic plan. Learn a step-by-step methodology to prepare an IP/innovation plan and monitor its execution. Link to the Matrix
- Apply to case study – ‘renewable energy’
- Strategy-making as a project: insights from project management, scoping, and team setting

### Understand (and influence) the vision

- Understand the business model
- Translate management goals into IP strategy options for value creation/capture

### Competition analysis

- IP mapping techniques:  
Analysis of patent data (lifecycle, competition etc.)
- Revisit the Matrix through the competition landscape
- Link to the value chain

### Portfolio gap analysis

- Gap analysis with the Matrix:  
Comparing business vision to current IP portfolio
- Derive options to bridge current-desired IP position

### SWOT analysis, target model design, performance, and budget

- SWOT analysis using the gap analysis and market data (incl. others' IP) formatted with Matrix to realize alignment
- Prioritize actions to define an IP roadmap.  
Make different scenarios
- Define KPIs to report future success.  
Assess IP Returns (first patent filings, IA profit etc.)
- Estimate budget needs for R&D and IP

### The strategic IA plan – the outline

- Integrating outputs of the prioritized SWOT analysis into a practical, rationalized plan. Plan template provided
- Differentiate core vs. non-core activity for higher performance

### Get buy-in

- Prepare and present your plan to management.
- Presentation template provided

## 3<sup>rd</sup> day: 09:00 - 16:30

### Team presentations and feedback

- Teams present their plan to the group and get feedback (online questionnaire – a collective learning report will be issued after the seminar for each team, with benchmark against 350+ prior participants)
- Strategy reports: other formats and examples

### Reapplying the DIPS methodology

- Identifying and facing complexity in situations. Flexibility of DIPS tools. Gradual approach with real-life situations
- Teamwork: identify generic situations, first diagnostic, and design solutions using DIPS tools. Present and group discussion
- Final recommendations and tips

### Wrap-up and feedback

## Bonuses

- Personalized collective feedback report for each team, based on individual feedback given during Day 3, and benchmarked against 350+ former participants.
- Free access to online portal DIPS for 1 month after the seminar. Online DIPS is an online platform to help companies, as well as consultancy and law firms, to design strategic plans for innovation generation, protection and exploitation. It helps collect and format multidisciplinary data on the (client's) company. It provides support for data analysis using Patentopolis proven frameworks. It guides decision-making to elaborate a plan ready for implementation.
- Discount for certification DIPS: You can keep the focus with an in-house project after the seminar. During that project, you apply the Patentopolis' frameworks to your own case, with guidance, review and final approval by the Patentopolis team. You start when you want. The recommended duration is 3 months. Upon completion, you receive a certification from Patentopolis.

## Get prepared for the course!

We will send you a reader with details and instructions prior to the course. Thus, you can prepare the case studies and other assignments and get the most out of the course. 2 to 3 hours of preparation is suggested.

## Heidelberg spring courses

On the first evening of the course FORUM · Institut für Management GmbH is pleased to invite the participants to a behind-the-scenes tour in the beautiful castle of Heidelberg, followed by a joint dinner in a traditional and cosy Heidelberg restaurant.

Registration under  
service@forum-institut.com or  
Fax +49 6221 500-555

## Registration Form

Yes, I will attend the practical course

IP Strategy

21 - 23 May 2019 in Heidelberg

Yes, I agree that FORUM Institut may inform me about events by:  
 email; and/or  telephone. I may withdraw my consent at any time.

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Name

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Company

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E-Mail

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Contact person at office

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Date, Signature

## How to register

■ **Registration:** +49 6221 500-500

■ **Course no.** 19 05 181

■ **Internet:**

[www.forum-institut.com/patent-seminars](http://www.forum-institut.com/patent-seminars)

■ **Date/Venue:**

21 - 23 May 2019 in Heidelberg

Europäischer Hof Heidelberg

Friedrich-Ebert-Anlage 1 · 69117 Heidelberg

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1<sup>st</sup> day: 13:00 - 17:30

social program: 18:00 castle tour and joint dinner

2<sup>nd</sup> day: 09:00 - 18:00

3<sup>rd</sup> day: 09:00 - 16:30

■ **Fee:**

€ 2.280,- (+ 19% VAT)

The fee includes course documentation as well as midsession refreshments, lunch, social program and certificate. Invoice and confirmation will be forwarded to you.

■ **Hotel accommodation:**

A limited number of rooms have been reserved at the hotel and are subject to availability. Please book at least six weeks prior to the seminar to obtain a hotel room at the discounted rate. All bookings should be made directly with the hotel quoting 'Forum Institut' and the course number.

## Any further questions?



Please feel free to contact me if you have any questions.

**Jean-Claude Alexandre Ho, LL.M.**

Lawyer, Conference Manager

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## Cancellation Policy

Our general terms and conditions apply (as of 1 January 2016) and are available upon request. We can send them to you anytime or you can find them on the internet at [www.forum-institut.com/t&c](http://www.forum-institut.com/t&c).