IP Strategy

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

TOPICS

• 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

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

In cooperation with: Patentopolis

IP for Innovation, Value & Growth

12 - 14 MAY 2020 IN HEIDELBERG
IP Strategy – Step by Step

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

- **Stephan Ising**, Expert IP Strategy & Research, Thyssenkrupp Intellectual Property GmbH (Germany) – 24 July 2019: ‘Evaluating IP portfolios and meeting budget restrictions can be challenging, especially during organizational changes. DIPS tools help to provide deep insights in IP goals, to focus on areas where to invest with value-add, and to communicate them within the organization. Patentopolis workshop is a perfect event to learn a useful methodology (DIPS) and apply it immediately in interactive cases.’

- **Luca Pusterla**, Corporate Intellectual Property Manager (Italy) – 24 July 2019: ‘I like DIPS; it provides a practical, holistic approach to review the business case and identify potential dead weights in the portfolio. From there, it becomes possible to design objective metrics to put in place.’

- **Morné Barradas**, Senior Manager Intellectual Property, Sasol (South Africa) – 24 July 2019: ‘IP can be seen as delaying R&D projects, because clearly demonstrating how IP aligns with business strategy can be challenging. DIPS toolbox enables this; it gives a simple yet practical framework to help translate techno-business drivers into IP strategy options and continuously monitor alignment between IP and project objectives. DIPS workflows also help to measure (mis)alignment and to show it.’

- **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.’

- **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’

- **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.’

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.
1st 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

2nd 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

3rd 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 FORM

Yes, I will attend the practical course

☐ IP Strategy

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

Date and venue:
12 - 14 May 2020 in Heidelberg
NH Heidelberg
Bergheimer Str. 91 · 69115 Heidelberg
Tel. +49 6221 1327-0 · Fax +49 6221 1327-100

1st day: 13:00 - 17:30
social program: 18:00 castle tour and joint dinner
2nd day: 09:00 - 18:00
3rd 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.

CANCELLATION POLICY
Our general terms and conditions (as of 1 January 2016) apply and are available upon request. We can send them to you at any time. Alternatively, you can access them online at www.forum-institut.com/t&c

YOUR CONTACT
Jean-Claude Alexandre Ho, LL.M.
Lawyer, Conference Manager
Tel + 40 6221 500-675
jc.alexandreho@forum-institut.de

FORUM · Institut für Management GmbH | POB 105060 | 69040 Heidelberg | Germany