

# Patent Portfolio Management

Our suite of services provides clients with the ability to make better informed strategic business decisions around their patent portfolios.

CPA Global, the world's leading provider of intellectual property management services, offers a comprehensive suite of patent portfolio management solutions. These solutions extend far beyond patent renewal payment services and are designed to help clients make better informed decisions, realize cost savings, extract commercial value and mitigate risk.

With more than 40 years of experience and an ongoing investment in the latest technological infrastructure, CPA Global continues to lead the way in innovative IP Portfolio Management solutions.

## **CPA Global Patent Renewal Services**

CPA Global handles 60% of all international renewals, paying on over 1.4 million patent cases per year. We focus on delivering real and lasting value to our customers demonstrated by our flexible engagement options for both law firms and corporations. Our operational controls are designed to prevent errors and mitigate risk throughout the patent payment process.

We offer an end-to-end patent annuity management solution that tracks, manages and makes patent maintenance payments on behalf of our clients. Our standard service features include:

- Maintaining patent case data on our payment system alongside detailed up to date country laws and regulations
- Generating and sending payment deadline reminders
- Providing access to online management tools where you can track and monitor payment activity and run budget/cost forecast reports
- Verifying the accuracy of your patent data
- Managing complex international currency transactions and funding the payment of official fees
- Providing a 'double check' to avoid accidental abandonment and identify monetization opportunities (Optional)

## **IP Management Software**

A company's IP management system can be a wealth of untapped information holding some of the most business critical data and intelligence. The ability to identify, analyze and extract this information can help drive and influence both your company's IP and business strategy decisions.

Over 20,000 IP professionals rely on CPA Global Software Solutions to manage and make strategic decisions regarding their IP. By providing the most advanced, innovative and configurable solutions on the market, we've established ourselves as a leading provider of web-based IP management software for corporations and attorney firms worldwide.

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### **Patent Portfolio Optimization**

Patents are critical corporate assets that need regular oversight. Mergers and acquisitions, rapidly evolving product lines and an ever-changing competitive landscape increase the need for regular and detailed portfolio review and analysis. Every company, regardless of the size of their portfolio or the internal resources available to manage the portfolio, can benefit from a proven independent third party review which includes decision support options for optimization. Our Patent Portfolio Optimization Solutions provide a range of tools and services to help patent owners review, analyze and manage their patent assets:

- Portfolio segmentation analysis based on scoring and expert analysis to provide an additional dimension to portfolio management decision making
- Patent monetization services including patent marketing studies, evidence of use, patent valuation and patent broker networking
- Patent intelligence, analytics and landscape studies

### **Patent Data Management**

Throughout the life of a patent portfolio, patent data can become compromised due to human error, faulty agent reporting, docketing errors, software conversions and the acquisition and assimilation of patents that originated or came from another responsible party. CPA Global offers a data verification solution whereby bibliographic patent data is compared to public data and patent registry sources to identify any discrepancies that may lead to a missed deadline or an action taken against the wrong case.

Our Patent Data Management solutions also include updating official ownership data with local PTO's when changes occur. Through our proprietary approach, paralegal project managers oversee the entire transfer process from short form deed preparation, document retrieval, legalizations, agent instructions and confirmations. By leveraging our foreign agent network, we negotiate competitive agent rates and provide total-cost-of-project quotations before work commences.

### **Patent Research**

CPA Global Discover<sup>sm</sup> is the world's most sophisticated online patent research platform that provides global patent intelligence and decision support for patent portfolio managers, researchers, analysts and attorneys.

Key portfolio management features of Discover include:

- Intuitive user interface for the broadest range of portfolio management tasks and users
- One stop solution for Enriched Global Patent Data to provide informed decision support to maximize value and minimize costs
- Analytics and visualization tools for greater insights and internal communication of patent information
- Automatic alerts and patent watching to monitor competitors, targets and technology sectors
- Patent scoring capabilities within a particular technology space providing intelligence to make smart decisions on your IP portfolio

For more information – visit [www.cpaglobal.com](http://www.cpaglobal.com) or contact us [ipinfo@cpaglobal.com](mailto:ipinfo@cpaglobal.com)

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