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Summary

Headquarters
Canada

Industry
Mobile Communications

Number of IP sites
3

Size of patent portfolio
200 patents globally

Product
CPA Memotech 2004

Modules
Patent, Invention Submission,
Cost Tracking

The bottom line

- Web-based system
- Intuitive interface
- Significant built-in automation
- Strong set of patent laws
- Scalability and reliability
- Responsiveness of vendor in dealing with problems
- Ability of vendor to remain competitive in the industry
- Integration with annuity services

BUILDING A CENTRAL IP INFORMATION SYSTEM:

Automation, Improved Communication with Stakeholders and a Platform for Invention Management On-line at Research In Motion.

Corporate Profile

Founded in 1984, the Canadian company Research In Motion (RIM) is a leading designer, manufacturer, and marketer of innovative wireless solutions for the worldwide mobile communications market. In 1998, RIM launched its most popular product to date, a portable two-way e-mail and telephonic device called the BlackBerry®. But becoming the leader in its field wasn't as simple as just designing the right products; RIM also needed to ensure that it protected its patent rights from day one.

The Business Challenge

The Patent Department manages a large global portfolio of active patent applications and over 200 global patents. Spread out over three different sites in North America, 13 IP specialists work diligently to ensure that RIM's patent rights are protected. It's a constantly evolving process that has become even more complicated in recent years, due to increases in the amount of filings and the number of staff charged with enforcing RIM's stringent business rules. It quickly became clear that the Microsoft Access database they were using was unable to meet the company's growing needs, so they searched for alternatives.

RIM needed a comprehensive IP management system that could ensure consistency in docketing, authenticate access rules for data modification by employees, and reduce redundant data entry and associated data errors through greater automation.

Solution

RIM evaluated products from eight different vendors before deciding on CPA Memotech 2004.

We felt it was the only product capable of monitoring our entire portfolio.

The fact that it was fully web-based also meant that the IP staff in our various North American offices could all access the same patent data from different locations at the same time.

George Babu,
Patent Agent Trainee at RIM.

Results and benefits

The system is used daily by 20 people who manage the patent portfolio. It allows RIM to better track its portfolio, reduce data errors, and increase the automation of the docketing process.

Equally important to the company is that the system can incorporate patent laws to ensure that deadlines are docketed and monitored. CPA Memotech 2004 is able to meet this need using a powerful law engine and a database of rules for the filing and registration of patents worldwide. This facilitates RIM's docketing practices by reminding the IP Department of important deadlines.

Meeting the reporting needs

The reporting function in CPA Memotech 2004 is much more sophisticated than the one available in RIM's previous Microsoft Access database. The standard directories in CPA Memotech 2004 ensure that data is consistent from record to record. All data can be tracked and reported on meaning that anything in the database, even text fields, can be used in a report.

In addition, CPA Memotech 2004's interface with Crystal Reports allows for real-time reporting. Once the IT department has built each custom report by setting the parameters, the IP department is able to run and re-run reports without calling on further assistance from IT. As George explains: 'Our staff can run the reports immediately rather than having to wait for the IT team to create, run, and then provide the reports. This is a much more effective way to handle simple requests.'

Increasing communication with business units

The software has not only increased automation in the IP Department's internal processes and improved productivity; it has also allowed them to increase communication with their internal clients.

'IP is no longer at the disposal of the IP Department alone. Licensing, as well as Finance, Payroll, and Marketing departments are looking for increased collaboration on the IP portfolio.'

The IP department used to be bombarded with questions from different business units, but was unable to deliver information quickly enough or with enough detail because it was lacking the right tools and technology to do so.

With CPA Memotech 2004, we are able to share access to IP data much more effectively with other business units.

Using the reporting function, RIM is now able to provide information that it was not able to extract from its old database. 'When the Licensing Department needs to know what's in our portfolio within a certain technology area, we can easily meet their needs,' explains George. 'All the data is stored into the database and can be easily extracted into a report and delivered to them in a timely manner.'

RIM has improved efficiency by reducing the time it takes the IP Department to deliver information to its internal clients. As George reveals:

Generating our patent incentive awards reports used to take a week. It now takes a few hours to supply the required information to our payroll department.

RIM also makes certain custom reports available on its enterprise reports server allowing other business units to run the reports themselves rather than relying on the IP department to do it for them.

Looking to the future: Invention submissions on-line

RIM plans to implement the Invention Submission module of CPA Memotech 2004 to facilitate the invention submission process within the company. RIM will configure the module to match its internal workflow.

Currently, inventors complete a word template and e-mail it to an internal patent mailing list. The invention submission administrator creates a Project for each incoming submission and a committee reviews the submissions bi-weekly to determine which ones to pursue. This will change when inventors start using the Invention Submission module, as George explains:

Soon we will be able to handle most of the process via the web, allowing inventors to submit and manage their inventions on-line.

Long term, RIM is planning to build upon the on-line evaluation facility and to make use of the e-mail templates it provides to send automatic updates to inventors that notify them of their invention's status at a given stage.

The company's next step will be to use CPA's Renewals Service to handle its annuity payments and the CPA Electronic Interface to facilitate the transfer of all renewal-related information electronically to CPA.

Now that CPA Memotech 2004 has provided RIM with a central IP information system, the IP department has been able to automate its docketing processes and to deliver detailed information to its internal clients; managers and executives can now access key data when they need it; and inventors will soon be able to track their patents and applications on-line. This is an exciting time for RIM; and the best is yet to come.