

Finding the right knowledge management solution

Pat-KM provides access to global patent data with integrated workflow for monitoring, classification and dissemination of relevant patent records, say James Cooper and Caitlin Kavanagh of Minesoft.

For any innovation-driven industry, it's crucial to be aware of the IP landscape in your technology area. For example, consider the fact that 70 to 80% of scientific and technological information is available only in patents—by not monitoring this effectively, how much actionable intelligence is your company missing out on?

The rate of new inventions has continued to increase in 2018, with China at the forefront of the rise in global patent applications for 2017. Knowing and studying global patent data is an effective tool to avoid parallel developments and wasted R&D efforts in overcrowded research fields. By ignoring and/or undervaluing IP, businesses can be driven into risky situations, such as opening up your company to infringement proceedings which could result in further loss of profits and harm your long-term corporate ability to survive, or the possibility of competitors taking advantage of your own technological innovations.

Patent knowledge management

IP knowledge management processes help to avoid or mitigate these challenges by providing a system to monitor the IP landscape and direct relevant documents between departmental experts in a configurable manner that suits a range of scenarios.

Patents are indicative of modern innovation



“Users can benefit from access to comprehensive, shareable and searchable legal status information, citation tracking tools, high-quality machine translations and more.”

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Caitlin Kavanagh





trends. In addition, they contain important technical information as applicants must describe and explain their inventions in a clear and complete way. Hence, the core requirement of IP knowledge management systems is frequently to ensure that a company's R&D team is kept aware of emerging trends and the actions of the competition, ensuring that their current projects are "on trend" while avoiding potential duplication.

Many available patent databases already perform this function, with the ability to set up alerts which monitor new applications and granted patent documents as they occur and send out the pertinent information to approved recipients.

However, the quality of the underlying searchable database of patents is going to have an effect on decision-making, and only a few companies worldwide have concentrated their efforts on this niche, challenging, detailed sector. IP knowledge management tools have the functionality to take this workflow further, involving other branches of your organisation and therefore facilitating knowledge-sharing across multiple departments.

For example, once the results of an alert have been reviewed by the technical teams, specific records can be forwarded to the legal department if a member of the technical team believes that a potential breach has been identified. Alternatively, identified competitor action, as foreshadowed by newly published patents, might be forwarded to the executive branch to inform a future offensive or defensive strategy to counter emerging threats or capitalise on opportunities to outmanoeuvre competitors.

Internal documents such as search or examination reports, case studies or value-added information like commercial reports on a specific assignee can be linked to a patent family, providing additional insights beyond the patent data alone.

Minesoft's knowledge management solution—Pat-KM—is adaptable to the customers' needs. Pat-KM incorporates internal company workflows and custom taxonomies to help manage patent knowledge globally throughout the organisation. Our "off-the-shelf" system is relied on by some of the world's best-known and leading companies.

Pat-KM can be thought of as a comprehensive software solution overlay on the data available in PatBase, granting your users the benefit of access to the wide range of search and analysis tools available within the PatBase system, as well as the additional fields and rules set up for your personal archive. Users can benefit from access to comprehensive, shareable and searchable legal status information, citation tracking tools, high-quality machine translations and more.

Transforming the workflow life cycle

Patents offer a well-codified, fully searchable and readily available pool of competitive intelligence waiting to be exploited. Those diving in are faced



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James Cooper

with challenges of volume and accessibility, but perseverance and employment of specialist databases and advanced knowledge management systems, such as Pat-KM, that automate many of the processes, will pay off in terms of the wealth of insights gained.

Let's imagine that Company X is preparing a project to break into a new technology area. A freedom to operate (FTO) search has already been completed and determined that there are currently no existing patents that will be infringed by the new invention.

With the deployment of Pat-KM, the knowledge management team can work alongside the technical team to set up relevant alerts for the new technology area they are entering; these alerts can continue to monitor the area to ensure that high-risk patents aren't being granted in jurisdictions of interest. Should a new patent emerge before the project is complete, it may well be more cost-effective to abandon the internal project and seek a licence rather than continue and risk infringement in key jurisdictions!

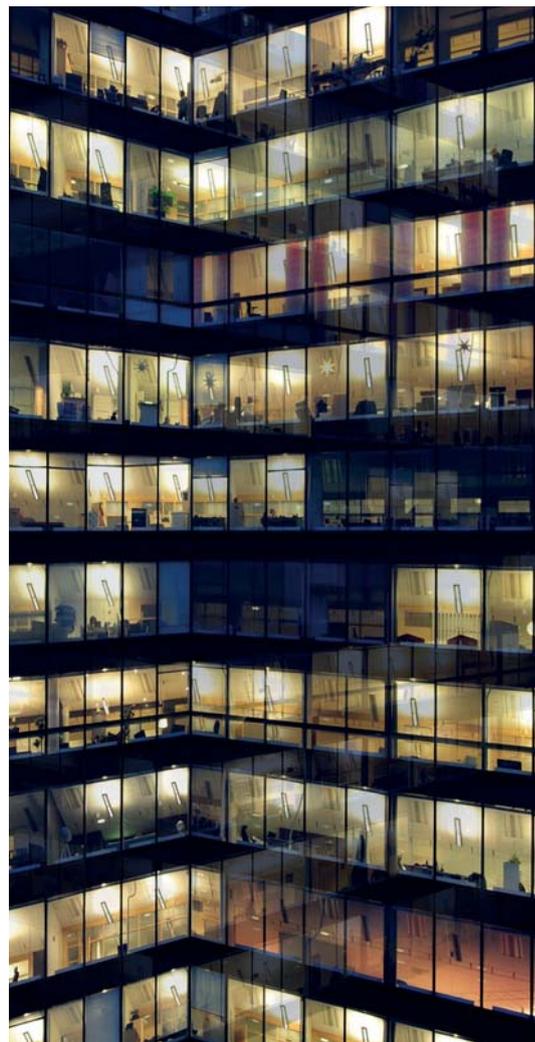
In this situation, the legal status browser can be utilised, giving users the ability to view the status of a patent across multiple jurisdictions, revealing whether their key commercial locations are still open to them. A patent that doesn't cover where you operate should be monitored to ensure additional documents aren't filed in those countries, but it might not be the death knell for your own project.

In Company X's workflow, the alert results move out to recipients automatically. However, other companies might prefer to tailor their knowledge management system to route all information via the IP team by a manual process, should tighter control be a requirement for your business processes. Pat-KM is not an out-of-the-box solution; it is designed to be highly customisable to meet the individual needs of every user.

Pat-KM allows effective knowledge-sharing with users who are outside the technical and legal sphere, such as section heads or company directors who can request a summary of the new information on a particular topic for review. The CEO of Company X is able to monitor any documents that are relevant, a potential licensing opportunity and with no legality issues. Every week, she will receive a selection of documents matched to her interests based on the human actions taken by archive users throughout the previous week, ensuring that every document that crosses her desk is relevant and important to her business.

Gaining actionable business and competitive intelligence

Exporting this additional data alongside patent data is crucial for reporting purposes. The archive snapshot tool grants the ability to run analytics on the patent families and tagging behaviour of your users within the archive. This allows additional insights to be retrieved from your data and easy assessment on how



effectively your current workflow design is meeting your requirements.

Pat-KM acts as a fully separated overlay to a searchable patent resource like PatBase, securing and archiving competitive intelligence and internal information and placing a powerful set of patent-searching and competitive intelligence tools into the hands of company executives, at the same time acting as a place to centralise their in-house special expertise in their technology sector.

Analysing patent information will help an organisation to improve its overall understanding, not only about competitors but about where it sits in relation to the global field of activity. It can also give a more informed basis for business decisions about the future direction of the company and due to this, patent information and patent analysis is being given more weight in boardrooms.

PatBase Analytics V2 provides a comprehensive strategic overview of your own and your competitors' patent portfolios to better understand current and future opportunities and threats. Effective use of this software can produce an accurate description of key players in the marketplace, and provide early warning on competitor strategies and general commercial

activities, as well as identifying 'white space' in overcrowded technology areas.

Users can take these insights and create visually appealing reports that communicate the results clearly for decision-makers in a boardroom environment. Nicely presented, well-constructed visualisations will allow decision-makers and data specialists to work together with a full and complete understanding between them, with the option to include specific specialist knowledge entered by system users within exported data.

Conclusion

Protecting, monitoring and investing in IP is beneficial to companies of all sizes. IP protection is crucial to avoid having your unique ideas, products or services infringed. Even huge corporations can have their ideas infringed, requiring multimillion-dollar lawsuits.

Patents are the most comprehensive source of ideas available and are invaluable for an effective R&D strategy, as well as competitive and business intelligence purposes, giving a company advanced warning of emerging threats and opportunities. The retrieval and assessment of patent data provides insights into competitor activity, potential collaborators, and technology trends as well

as competitor activity. It's crucial to share this information in a manner that is easily understandable, contains the correct amount of information and can lead to inspirational discussions or ground-breaking ideas.

Pat-KM provides access to global patent data with integrated workflow for monitoring, classification and dissemination of relevant patent records. As a knowledge management system, it represents an evolution away from the usual one-size-fits-all solution towards a more bespoke approach that can adapt and change based on client needs and feedback to changing scenarios. ●

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