

Docketing Case Study:

Enhancing IP Portfolio Management through Docketing Solutions

Innoastra

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Background

A client with a significant intellectual property (IP) portfolio consisting of over 1500 applications faced challenges in managing their assets efficiently. Their existing process involved using a spreadsheet to maintain their extensive portfolio, a method that was both time-consuming and prone to human error. Recognizing the need for a more robust system, the client turned to our expertise to modernize and streamline their IP management process.

Understanding the Process

Our initial step was to work closely with the client to gain a deep understanding of their process and its unique requirements. This collaborative approach was crucial to ensure that the transition to a new system would be tailored to their specific needs and would result in enhanced efficiency and accuracy.

Suggested Solution

After a thorough analysis, we suggested that the client migrate their entire portfolio from the cumbersome spreadsheets to a sophisticated docketing platform. We also recommended a comprehensive review of the bibliographic details against various country Patent and Trademark Office (PTO) websites to ensure accuracy and completeness of the data.

Implementation

Our team meticulously updated the IP records on the chosen docketing platform. This involved inputting relevant data such as PTO notices, related communications, and detailed bibliographic information. The platform was designed to be intuitive, allowing for easy navigation and management of the portfolio.

Results

The transition to the docketing platform transformed the client's IP management capabilities:

- Their IP records are now clean, streamlined, and up-to-date.
- The platform enables quick, single-click access to critical information such as upcoming PTO deadlines and the current status of applications.
- The risk of missing a PTO deadline has been significantly reduced since the data is well-organized, and the platform's tracking and reminder system is robust.

What Went Well?

- **Decreased Docketing Steps:** The move to the docketing platform simplified the workflow by decreasing the number of steps required to manage the IP portfolio. What was previously a multi-step process on a spreadsheet became a more efficient and direct procedure within the docketing system.
- **Reduced Administrative Time:** The automation and organizational capabilities of the docketing platform reduced the amount of time staff spent on administrative tasks. This allowed them to focus more on strategic activities and client support.
- **Increased Efficiency:** Overall, the transition to a docketing system resulted in increased operational efficiency. The system's ability to track, update, and remind personnel of important deadlines ensures that the IP portfolio is proactively managed.

Conclusion

The project illustrates the immense benefits of transitioning from manual spreadsheet management to a dedicated docketing platform. The client now enjoys a more reliable, efficient, and user-friendly system for managing their IP portfolio, reflecting best practices in

IP management and administration. Our successful collaboration with the client in overhauling their IP docketing process underscores our commitment to providing innovative, technology-driven solutions to complex IP management challenges.

About InnoAstra

InnoAstra renders end-to-end IP life cycle management services to an array of entities for streamlining their IP processes – from conceptualization to actualization to commercialization.

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