An Exact Software White Paper

Leveraging Intellectual Property:

How to Manage IP Across Your Organization

Part 2 of a two part series on intellectual property
by Plant-Wide Research

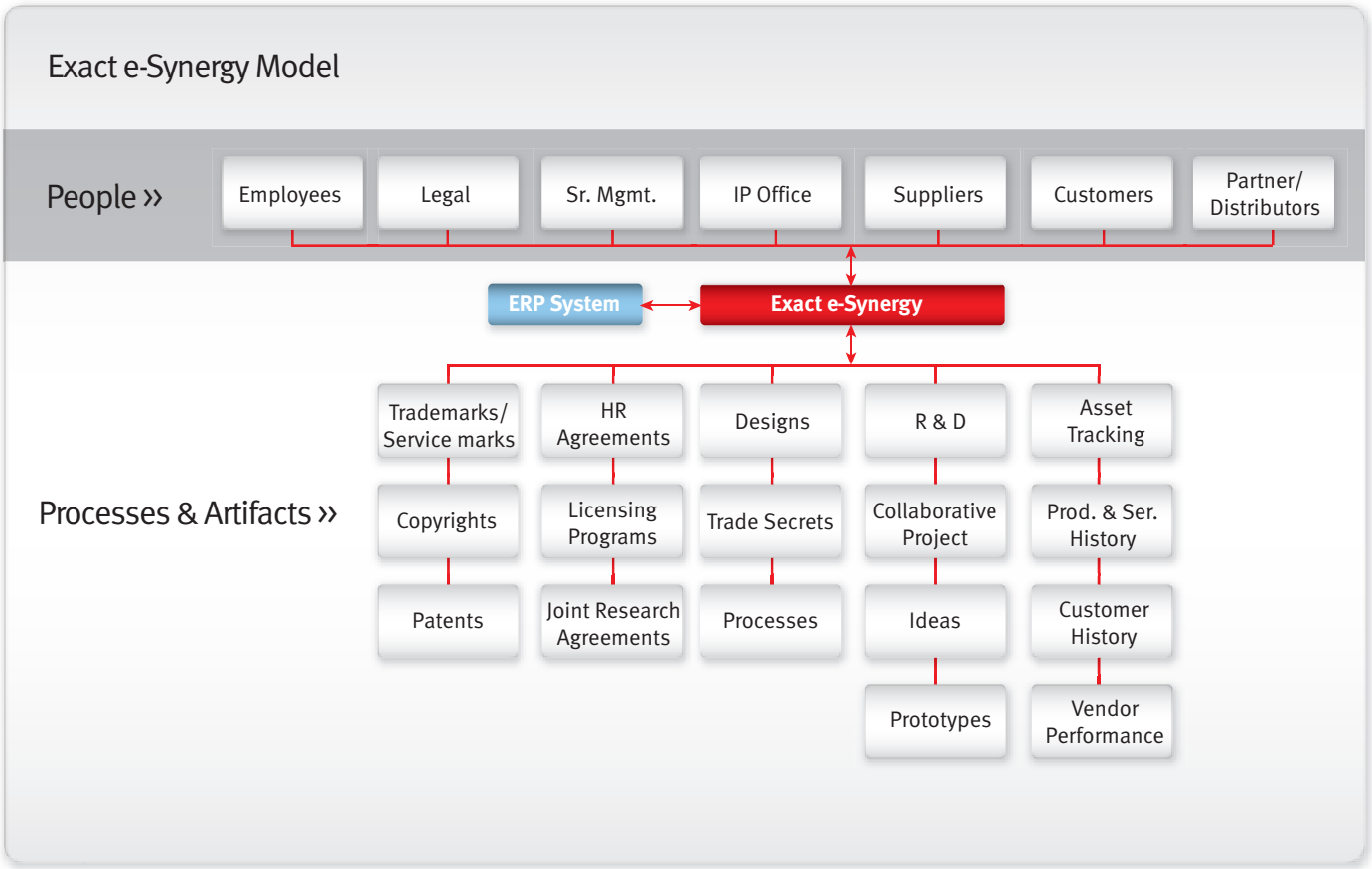
Business Unified™ Exact software™

Executive Overview:

A complete intellectual property management solution should tie together all the people, processes, and artifacts in your organization.

Managing corporate knowledge and the resulting intellectual property (IP) by proactively leveraging knowledge across the organization is the best way to enhance financial performance and capture competitive advantage in today's economy. In "Leveraging Intellectual Property: Why Corporate Knowledge and IP Are Critical to Your Business," we explained the importance of IP to modern business. We also made the case for new technology, new business practices, and organizational alignment to reap the value of intellectual property. This paper will give a detailed illustration of an intellectual property management system in action.

A complete intellectual property management solution should tie together all the people, processes, and artifacts in your organization. One software solution that is particularly well suited to intellectual property management is Exact e-Synergy. e-Synergy takes a holistic approach, facilitating collaboration and knowledge sharing throughout your entire organization and reaching out to key stakeholders, as the following diagram illustrates.



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The following hypothetical example of a new product development initiative highlights some of the ways e-Synergy can be used to effectively manage intellectual property. Although this example is based on a manufacturing company, the same capabilities are used by service-based businesses.

1. A customer enters an enhancement request on the customer portal.

Internet portals provide a unique window of communication between your company and communities of customers, partners, and employees. Exact e-Synergy lets you create customized portals for sharing information and conducting active conversations with each audience, without requiring additional IT resources. Secure private logins give each user a customized experience where they see only the content that is relevant to them.

In addition to accessing a wealth of knowledge through your portal, customers can submit automated workflow requests, in this case a product enhancement suggestion. “Workflow” is simply a way of describing how work gets done and is unique to each organization and process. Workflow automation involves formalizing the steps for a particular process and creating automated requests and approvals for each step.

e-Synergy’s workflow capabilities enable you to quickly distribute tasks to the right people, track the progress of each task, obtain the appropriate approvals, and report on the results. The advantages of formalizing processes in this way are:

- Increased efficiency
- Accountability
- Compliance with standards and legal requirements
- Visibility into the work in progress.

Workflow requests in e-Synergy can be configured to follow the process steps your business defines. In this case, the request flows to the product manager for this item and contains links to the customer, the item, the distributor that sold the item, and the vendors who provide inputs.

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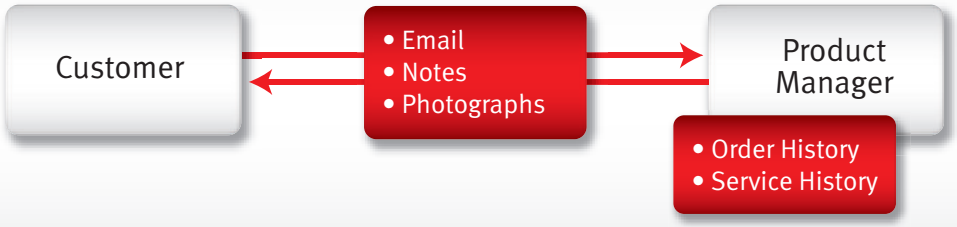
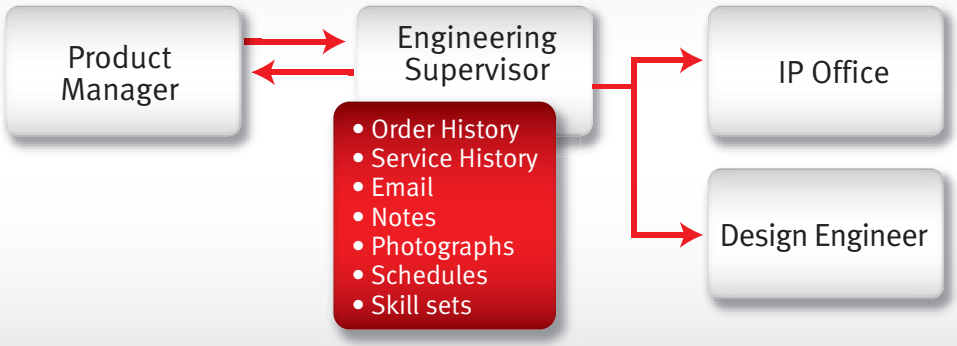
2. The product manager reviews the suggestion.



The product manager pulls up the order history of this item in e-Synergy and notices that sales have been dropping off. Since service requests are entered as workflow requests in e-Synergy, he can also see a report that indicates service requests have been rising for this item. A pivot analysis revealed that the bulk of complaints have been coming from larger customers. He decides that this suggestion warrants further investigation and sends an email to the customer thanking him for his suggestion and asking for more details. He saves this email correspondence in e-Synergy with one button using the Microsoft Office Add-in. He saves the document at the "customer specific" level meaning that the customer and any employee can view it but no other customer or business partner can get access.

3. The product manager forwards the suggestion to engineering.



The request moves from the product manager's workflow to the engineering supervisor. While it's true the product manager could have sent an email to the engineering supervisor, by using the workflow task the company ensures compliance with policy and procedure and increases information sharing and accountability. Everyone has experienced the "black hole" of email when you send a request to someone and never hear back from him or her. With e-Synergy, not only can you see the dates and times

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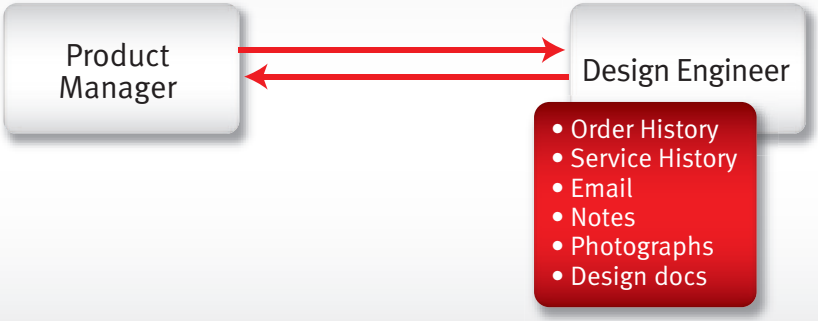
that someone read and responded to a task, you can see a log of everyone who has accessed the associated documents, projects, accounts, items, etc.

The engineering supervisor reviews all of the background related to the suggestion, including hand written notes and photographs that have been scanned in. She decides that it is worth pursuing and reviews the schedules, workload, and skill sets of available engineers in e-Synergy. She approves the request and assigns it to the best engineer for the job. At the same time, the product manager is notified that the project has been approved and assigned. The IP office is also notified so that they can monitor the progress and usage of this new IP.

4. The engineer initiates a new product development project.



The engineer creates a new project in e-Synergy. Projects in e-Synergy link together budgets, resources, documents, tasks, financial transactions, customers, vendors, and more. Centralization of project information facilitates greater communication among project participants and tracking of project activities for management analysis. Unlimited layers of sub-projects can be created to match your processes and later rolled up for reporting purposes. As with all other aspects of e-Synergy, projects are controlled with security roles and rules, including a “project specific” security setting which gives access to project-specific materials only to project members.

Working with the product manager, the engineer determines that the old product design worked fine for “light usage” but tended to fail when put under heavy use. He pulled up all the design documents for the old product and, using the customer input, creates a revised design. All of the documents related to the new design are saved as “project specific” meaning only members of the project can view them.

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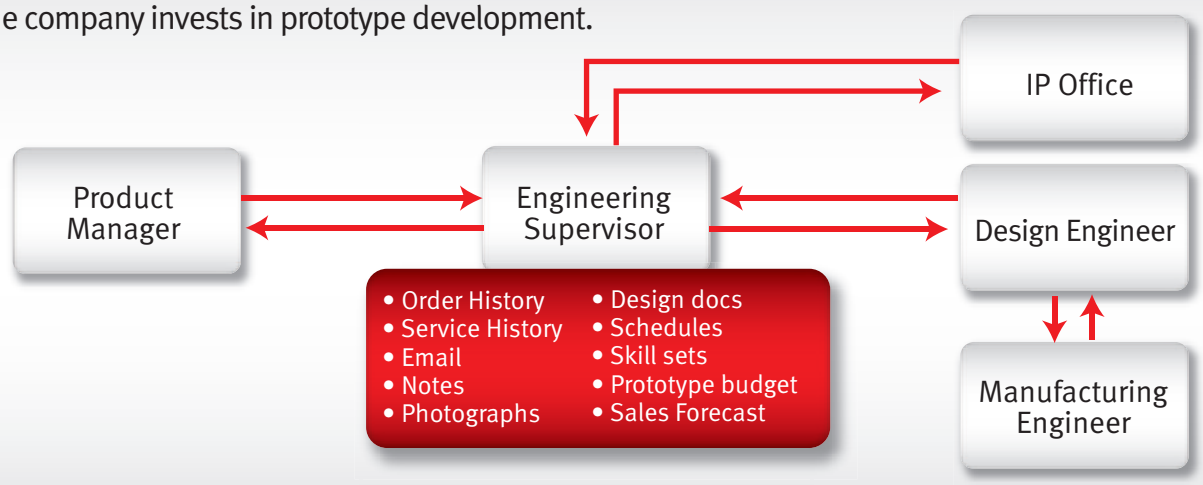
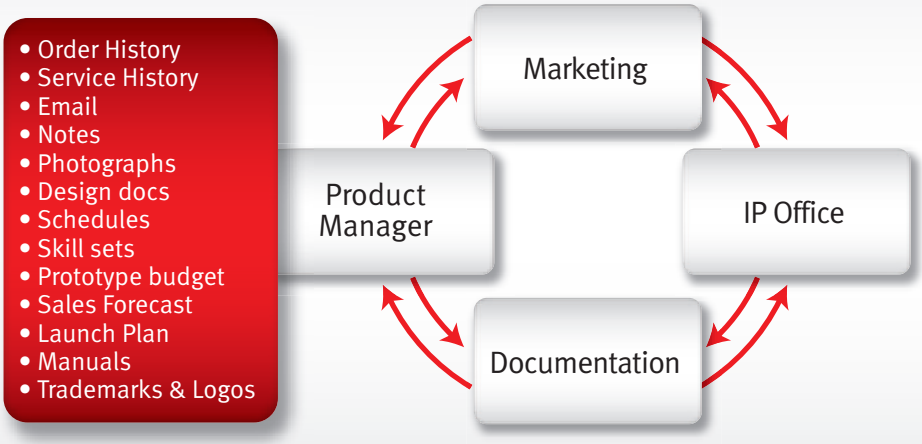
5. The company invests in prototype development.



Once the engineer is satisfied with the design, he searches for the appropriate manufacturing engineer and together they develop a budget for prototype development. He then sends a request for a prototype to the engineering supervisor.

She creates a sub-project for new product patent and sends a request to the IP Office. The IP office conducts a patent search and determines that the new design is patentable and gets agreement from the customer to forgo any rights to the new patent. She then sends a request to the product manager for a sales forecast. He has decided that there is enough demand for two products, the old product for “light” use and a higher-priced new product for “heavy” use. Once she is satisfied with both these responses, she approves the expenditure for a new prototype. The IP Office starts the patent application process.

6. The prototype is successful, company prepares for product launch



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Most of the documents related to the new product development project are changed to the “employee” level security so any employee can get access. The product manager creates a new product launch project and stores it as a sub-project.

A request is sent to documentation to create new manuals. The technical writer has access to the content of the old manuals, the new design documents, and knows who to contact with questions. The new manual is routed for approval via a workflow request (including review by the IP Office for conformance with copyright requirements). The final approved copy is entered into e-Synergy as an item so that it can be assigned a price, can be tracked in inventory, and can be associated with documents, accounts, other items, etc.

The marketing department creates two sub-projects – one for the promotional activities and one for creation of a new product name. Once they have decided on a new name, a request is sent to the IP office. The IP office conducts a trademark search and finds that the name is available. They then apply for and obtain the new trademark. The trademark is added to e-Synergy as an item. At the same time, an automated workflow request is created so that when the trademark application is up for renewal, a request will be automatically sent to the item owner.

Once the new item is created, a Marketing Specialist ads it to the company’s trademark start page. A “start page” is a specialized kind of document within e-Synergy. It’s an efficient way to aggregate information about a topic of importance to your business. Start Pages contain some basic information about a topic and links to related documents, reports, projects, etc.

A start page is simply a document that can be created with e-Synergy's document editor. Like any document in e-Synergy, security roles and rights control access to the start page. You can also control who has the ability to create and modify start pages. Likewise, each item that is linked to the start page has it’s own security settings, giving you ultimate control. You can publish start pages within e-Synergy or through an intranet or Internet portal, without any knowledge of HTML or web design. In this example, the trademark start page is available to employees via e-Synergy and to business partners via the partner portal.

This company’s trademark start page includes a policy statement about the correct usage of trademarks, links to all of the approved graphics files, procedures for creating and registering new trademarks, etc. For even more control over your trademark usage, you could link an automated workflow request that is routed through the appropriate approval process for each time someone wants to use a related item like a logo.

7. The new product launch is a great success as a result of teamwork and the effective use of technology like e-Synergy to help proactively manage this series of business transactions.

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Conclusion

Leveraging corporate knowledge and intellectual property across your organization is a complex challenge. As this example illustrates, an IP management system can help you cut through the complexity, capture inputs from across your organization as well as outside stakeholders, and give you control every step of the way. Most importantly, intellectual property is what makes your company unique. The best way to leverage your IP will also be unique to your organization. Like e-Synergy, the solution you choose should be comprehensive and offer the right mix of process control and flexibility.

About Plant-Wide Research

Plant-Wide Research is a leading research and industry analyst firm that provides industry benchmarks and commentary, competitive landscape analysis and end-user feedback in a variety of industry focused reports and services that incorporate both quantitative and qualitative aspects in order to provide a complete picture of the enterprise applications software market and industry. End-user companies and organizations use these products and services to assist them in planning, selecting, and maintaining IT investments as well as by the industry providers of applications software to remain competitive, current with competitors, focus on industry trends, and end-user needs. Visit www.PWR-Consulting.com.

About Exact Software™

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