

# PORTFOLIO DIAGNOSTIC

## Report snapshot

### BASICS

#### What is this study?

A Portfolio Diagnostic provides a focused analysis of a company's patent portfolio – most commonly your own – but also possibly another entity's, such as a competitor, future acquisition or potential partner. The targeted portfolio can be analyzed in its entirety or filtered for a specific component.

#### Who is this study for?

This study is primarily for leaders at many levels in the R&D and IP departments at large and medium-sized corporations. This includes business managers, IP professionals and technical leaders with titles such as:

- Innovation Lead
- CTO (and immediate reports)
- Strategy & Partnerships Lead
- IP Manager
- Head of R&D
- R&D Category Manager
- Head of IP

#### When should I request this kind of study?

This study is particularly useful for companies that don't have a solid understanding of what is in their patent portfolio and need assistance in guiding their portfolio investment and management decisions. This study would also be useful for a company that wants an in-depth understanding of another company's patent portfolio. If targeted at your own portfolio, this study is particularly useful for:

- **Portfolio Health:** Determining overall portfolio strength and health
- **Competition:** Mapping your patents to your own or competitors' products
- **Monetization:** Supporting monetization and licensing discussions
- **Strategy:** Making better and more informed portfolio management decisions
- **Fiscal Health:** Managing portfolio maintenance fee costs
- **Prioritization:** Focusing time on strategic and highest value patent assets

If targeted at another company's portfolio, this study can be used for:

- **Competition:** Determining overall portfolio strength and health
- **Strategy:** Evaluating R&D investment strategy
- **White Space:** Mapping the company's patents to its own or your products



### WHAT DOES THIS STUDY TELL ME?

Although every Portfolio Diagnostic is customized for the specific client, it provides your company with a detailed understanding of the targeted patent portfolio, with commercial insights and visualizations to inform and guide your company's R&D and IP strategies.

A typical study would provide:

- A customized technical taxonomy, generally based on products, product features/functions and/or product technologies, for purposes of categorizing all the patents in the target portfolio
- Complete categorization of all patents
- Documentation of review criteria (typically relating to commercial value, technical importance and patent defects) used to evaluate each patent in the portfolio, based on its claims
- Presentation of commercial insights and recommendations based on review and analysis of the categorized patents, from both a quantitative and qualitative perspective
- Other custom analysis as determined during consultation with the client

## POWERFUL INSIGHTS: GETTING THE MOST VALUE FROM THIS STUDY

### What is the typical structure for a portfolio diagnostic study?

- Executive Summary
- Key Findings
- Customized Taxonomy
- Categorized Assets
- Review Criteria and Evaluated Patents
- Commercial Insights Based on Portfolio Review
- Project Methodology

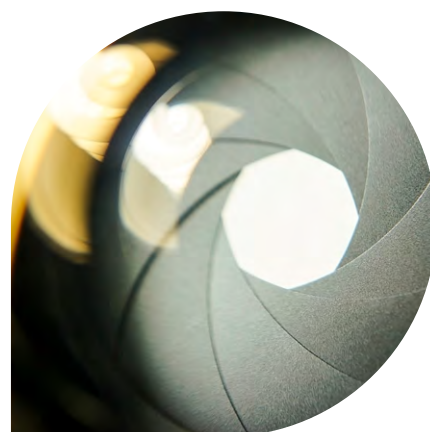
### What are the critical capabilities behind this study?

- Ability to create and use customized technical taxonomies and categorize large volumes of patents with such taxonomies
- Ability to develop and apply review criteria for assessing large volumes of patents
- Cleansed data and large categorized patent datasets
- Honed analytical frameworks to make clear the link between technology, intellectual property and commercial reality using clean visuals for quick insight

### What scoping requirements should I include when requesting this type of project?

An exceptional provider of a Portfolio Diagnostic will conduct a scoping call with you to ensure that your strategic needs are thoroughly understood before starting the project. The purpose of this discussion is to reach an agreement on the project's scope and objectives, the intended audience and the desired outcome. **This critical step in the project management process ensures that you and your provider are working toward the same objectives.** During this discussion, the customer would identify:

- The desired outcome, including the business decision(s) and goals the information is intended to support
  - Goals could include reducing portfolio costs, identifying monetization potential, understanding your competitive position, or improving operational effectiveness by identifying and focusing on the most strategic parts of the portfolio, among others
- Specific pain points you're dealing with and questions to which you need answers



## WHAT ELEMENTS ARE INCLUDED IN THIS STUDY?

An excellent version of a Portfolio Diagnostic will:

- Provide usable, sharable commercial insights
- Incorporate strong, easily understood visuals that communicate key takeaways from the assessment of the categorized and ranked patent portfolio
- Highlight key groupings that drive strategic decisions, such as important patents with strong commercial potential that align with business goals (core patents covering fundamental, enabling technologies or future bets) and the low value patents that should be abandoned or divested
- Along with the narrative and visual results, include delivery of the detailed dataset providing the categorization and ranking of all patents reviewed

- The project scope, including:
  - The specific entity that you want the report to cover (usually your own organization, but also potentially a competitor, supplier or potential partner)
  - The specific technologies or portions of the targeted portfolio that should be the focus of the project (if the entire portfolio won't be assessed)
- Both the audience reviewing the study, and the ultimate audience to whom the final study will be presented, so that the structure and style can be developed appropriately

### Who can utilize this study?

Your company can maximize the value from this study if it is distributed to, and read by, a large internal audience – not just by the team that was directly involved in commissioning the project. This will help to ensure that the commercial insights provided in the study attain corporate buy-in and support for critical R&D and IP strategy decisions, increasing the value of your investment in such projects.

If the Portfolio Diagnostic study is focused on your own patent portfolio, however, the results will include a great deal of confidential company information that you might not want to disseminate broadly. In this case, you would need to strike a balance between defining an appropriate internal distribution that will maximize benefits from the study, while also managing any confidentiality concerns. Your provider must take the confidentiality of your information seriously as well.

The best way to facilitate internal understanding of the results is a clean format that incorporates many compelling visuals to communicate key takeaways based on the assessment of massive amounts of data. The study and the supporting visuals are the key to socializing the results with your targeted internal audience. In some cases, you may also want to request a presentation, delivered by our expert consultants, which also provides a forum to discuss the results and potential consequences of the research.

### What other questions should I ask about this type of project?

- Does your provider have consultants with the right technical backgrounds and industry experience?
- Does your provider have the methodologies and analytical and reporting tools (including clean, compelling data visualization) in place to achieve a successful outcome?
- Does your provider have the knowledge and experience to translate your company's business objectives into meaningful portfolio metrics and IP objectives?
- Is your provider flexible and responsive?
- Do they take a client-centric approach?
- Do they understand the importance of confidentiality and the need to treat all your information and project communications with the utmost care?
- Can your provider communicate business results using clean, compelling, data visualizations?
- Does your provider have experience with multiple, honed analytical frameworks for assessing commercial implications of technical innovations?
- Does your provider have access to the market's leading analytics software that facilitates the quick matching of patent, financial and legal data?

## CONTACT US TO LEARN MORE

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