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# Finding the right IAM partner

**When it comes to selecting IP management software, buyers should be as careful as they would be when deciding whether to get married, writes Dee Campbell, a product manager with Thomson IP Management Services**

When purchasing new software, users get excited about pretty screens, the latest, greatest functionality and ease of use. With major systems such as IP management programmes, they will typically ask a number of questions about the vendor, as well. But given the expense, the hours they will spend with the vendor, and the effort required to switch programs, most buyers would do well to choose with the same care normally accorded to selecting a marriage partner.

## The dating game

In the beginning, it is mostly about looks and demographics – we want partners that share our basic interests. Does a vendor “speak your work language” and have a compatible view of the IP lifecycle? Does their software align with the way you do business, and is it highly configurable for a quick comfort level across your organisation?

Is it perhaps love at first sight: do they understand you so well that the software works out of the box, complete with pre-defined workflows, canned reports and the necessary forms, for example? Do they have other clients that look like you, with a similar portfolio, similar size, same industry? Can you see yourself in their case studies?

Sometimes a vendor is looking for a fling, making the sale and all but disappearing after a contract is signed. You will want someone who can be a partner for the long haul, providing the staffing, expertise, training and dedication to see you through a possibly complex implementation and beyond (even if you do not think you need much support, it is good to know it is available!).

And sometimes opposites attract: can they help with peripheral needs, such as docketing, data accuracy, patent payments and trademark renewals, letting you focus on IP strategy? Can the relationship grow as you do, with regular software releases plus complementary products and services to

meet your changing needs? Does the vendor offer consultative deep dives, filling in gaps in your own team?

## Before you buy the ring

As you move further into the selection process, there will probably be a front runner or two. Before you bring them home to meet your general counsel, however, you will want to start your due diligence. Pretty interfaces are great but won't be enough at this stage – you will need to consider core values such as accuracy, integrity and long-term viability. Some questions you might ask:

- Are they a public company or can they provide open books? How long have they been in business, and how established are their offerings? Are they IP industry thought leaders?
- A track record is critical—have their clients lost rights due to inaccurate or outdated IP rules/calculations (how often do they update?), or failed to make an on-time annuity payment? Do they use proven methods like TQM or Lean Six Sigma to maximize accuracy and efficiency?
- If you are considering patent annuities or trademark renewals at some point, how transparent are their prices? Payments are a myriad mix of official fees, agent fees, currency exchange fees, vendor fees and possibly others. Even if you are not thinking of the vendor for payments, this might be a good data point about the company.
- Client references—this one goes without saying!

## Then comes baby ...

A slick software system from a vendor you really like is all well and good, but if you will be entrusting your most critical IP assets to them you will want to go the extra mile in your due diligence – it is easier to break up a marriage than an entire family! Will you give them your blockbuster innovations and marks to make payments and ensure your rights are protected everywhere you do business? Even more importantly, will they host your entire portfolio and all the related details somewhere on the Internet?

Software delivery through technologies

like cloud computing provides an excellent way to minimise your reliance on IT support, keep your capital expenditures down, reduce hardware costs and allow access to even global stakeholders across the organisation. If the vendor has implemented it correctly, your data is absolutely safe and sound, but you should have complete confidence around the “if”. Questions here might be:

- Where will the data be housed? If the vendor outsources, what can they tell you about their vendor, and what are the terms of their relationship? Who has access to your data, and what is their security clearance?
- How proactive are they? How often do they do data audits and backups, what are their business continuity plans, how do they enforce policies, and so on?
- What is the service level agreement – can you get the support you need, when you need it?

Some of the biggest, most reliable vendors in the world utilise the cloud to deliver software and other services; Amazon and Salesforce.com are just a couple. It is important to be sure about your own vendor. Your in-house IT team, chief information officer, or the like quite possibly has guidelines already in place for the asking.

## Avoid the pre-wedding jitters

As with any kind of relationship, no single vendor is the right fit for every organisation. Finding the best possible partnership requires keen observation and a fair bit of foot work; some organisations so loathe undertaking it that, barring a catastrophe-like loss of rights, they will not even consider a divorce from their current vendor. But it is a process that pays off, and if your vendor is truly your partner, they can help ensure your IP programme's long-term success.

Product manager **Dee Campbell** has held numerous roles at Thomson IP Management Services, part of the IP Solutions business of Thomson Reuters