




Patent Analytics How-to Webinar Series: Episode 02

# How to Make and Use Portfolio Curation, Competitive Patent Landscape and SWOT Analysis Reports


# 5-Episode Analytics How To Webinar Series



**Episode 01** – How to Make and Use Portfolio Analytics, Patent Landscapes, and Patent Watching/Surveillance Reports

**Thursday, February 25<sup>th</sup>, 2021 at 12:00 PM CT**


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**Episode 02** – How to Make and Use Portfolio Curation, Competitive Patent Landscape and SWOT Analysis Reports

**Thursday, March 25<sup>th</sup>, 2021 at 12:00 PM CT**


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**Episode 03** – How to Make and Use Freedom to Operate Maps and Analysis, Product Coverage Analysis and Maps

**Thursday, April 22<sup>nd</sup>, 2021 at 12:00 PM CT**


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**Episode 04** – How to Make and Use Prosecution/Attorney Analytics and Examiner Analytics

**Thursday, May 27<sup>th</sup>, 2021 at 12:00 PM CT**

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**Episode 05** – How to Make and Use Blue Ocean/White Space Maps

**Thursday, June 24<sup>th</sup>, 2021 at 12:00 PM CT**

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## Before We Get Started...



### Recording

A link to the recording and slides will be emailed to all registrants.



### Questions

Type in the question box and we will answer in real time or during the Q&A.



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# Today's Presenters...



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**Piers Blewett**

Principal  
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# Episode Overview

**Competitive Patent Landscape and SWOT Analysis:** Customized Ontologies, Patent Landscape Selection and SWOT

**Portfolio Curation:** Customized Curation of a Portfolio According to Unique Client Needs



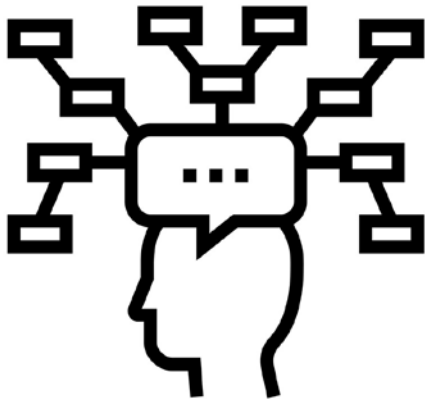
# Competitive Patent Landscape and SWOT Analysis: Customized Ontologies, Patent Landscape Selection and SWOT

Customized Ontologies, Patent Landscape Selection and SWOT





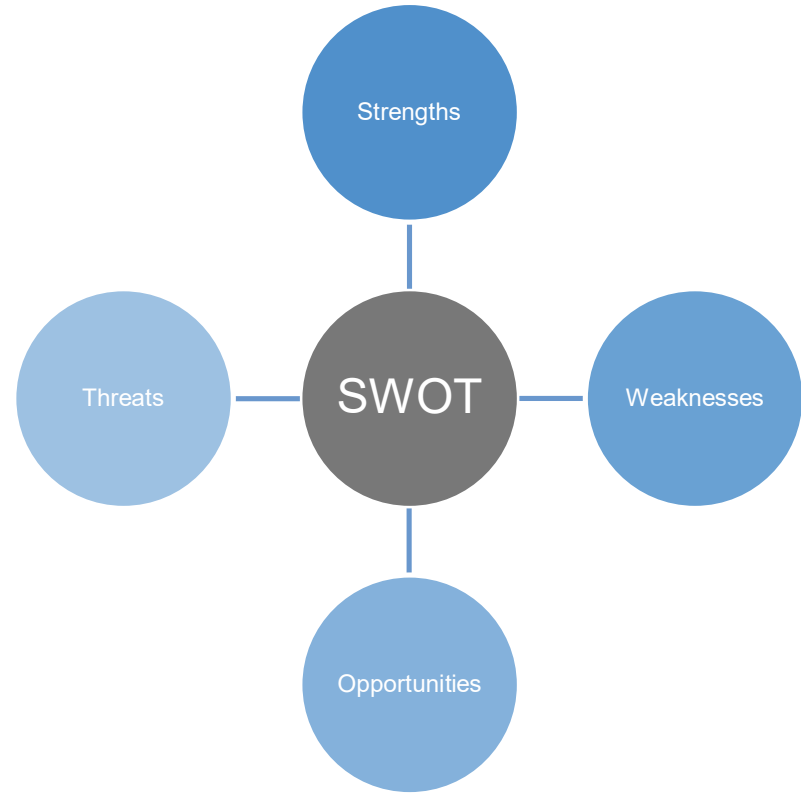
## What is it?



- A custom Patent Landscape and SWOT Analysis is tailored to the product space and competitive landscape of the client.
- Mapping ontologies are customized to the client's needs and preferences in consultation with client's legal and/or engineering team.
- The analysis organizes and classifies patents in a landscape by product/technology, importance and value relative to a company's business, strategy and goals.

# What is SWOT?

- Strategic planning technique related to business competition
- Used to guide decisionmaking process





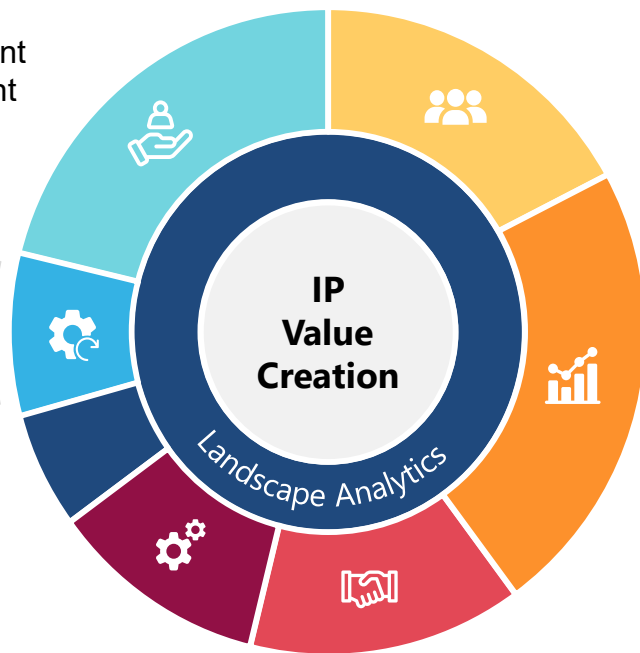
# Value Proposition

Identify strengths and weaknesses of a company's patent position in order to optimize patent and product strategy.

Strengths  
Weakness

Competitive Intel

Gain strategic competitive insight into the relative strengths and weaknesses of the patent positions of competitors in a technology space.



Identify possible emerging threats in a technology space.

Threats

Opportunity

Identify opportunities to expand in a technology space (e.g., potential partnering, licensing, acquisition opportunities)

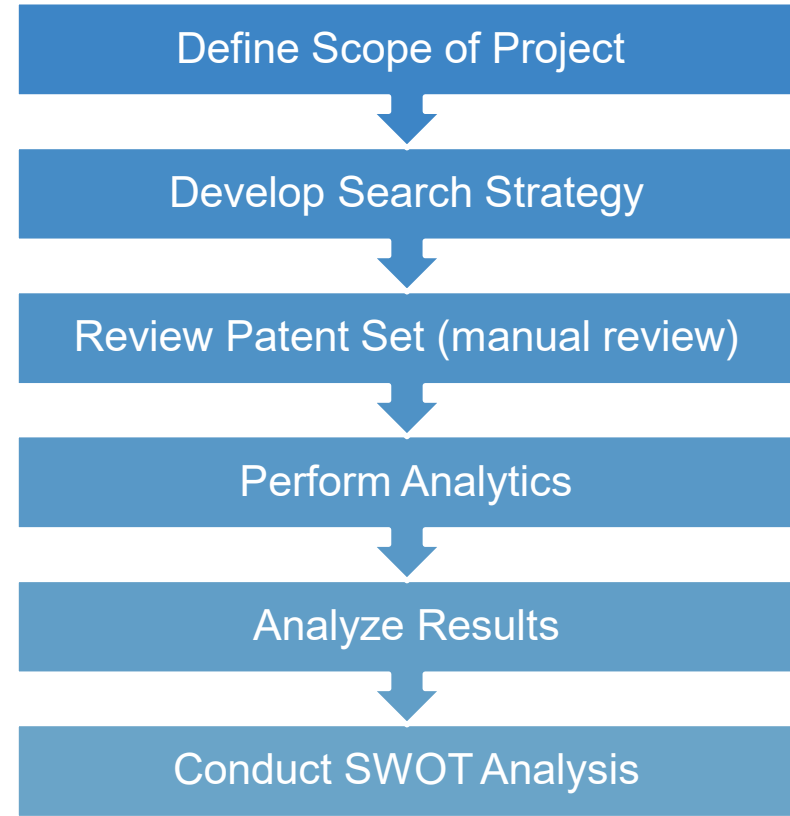


## Process and Cost

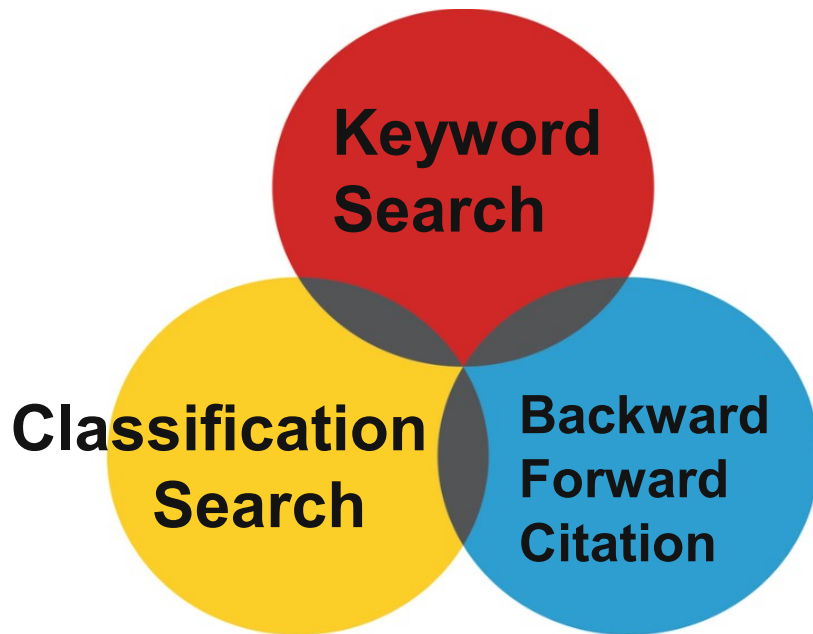
- Scoping of project and identification of key project deliverables
- Identification of technology and product categories/ontology
- Determination of any special ranking considerations
- Automated and manual categorization and ranking of patents and applications in the portfolio
- Generation of Reports based on the rankings and categorizations



## Outline of Process



# Search Strategy – Customize Search Based on Scope of Project



## Review Strategy



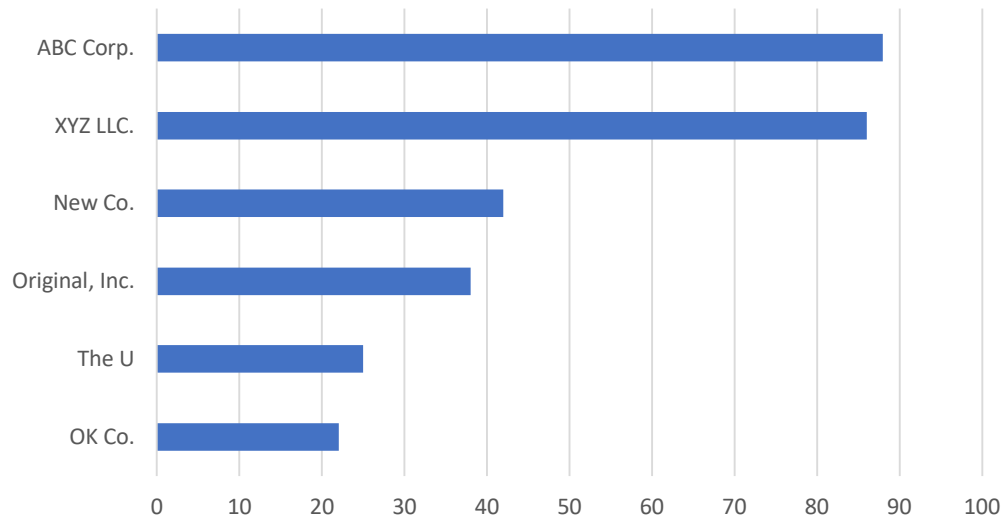
**Goal:** to obtain useful observations for SWOT analysis

- Relevancy– filter out noise
- Technology group
- Claim quality
- Claim type
- Identify key patents per assignee

# Landscape Analysis

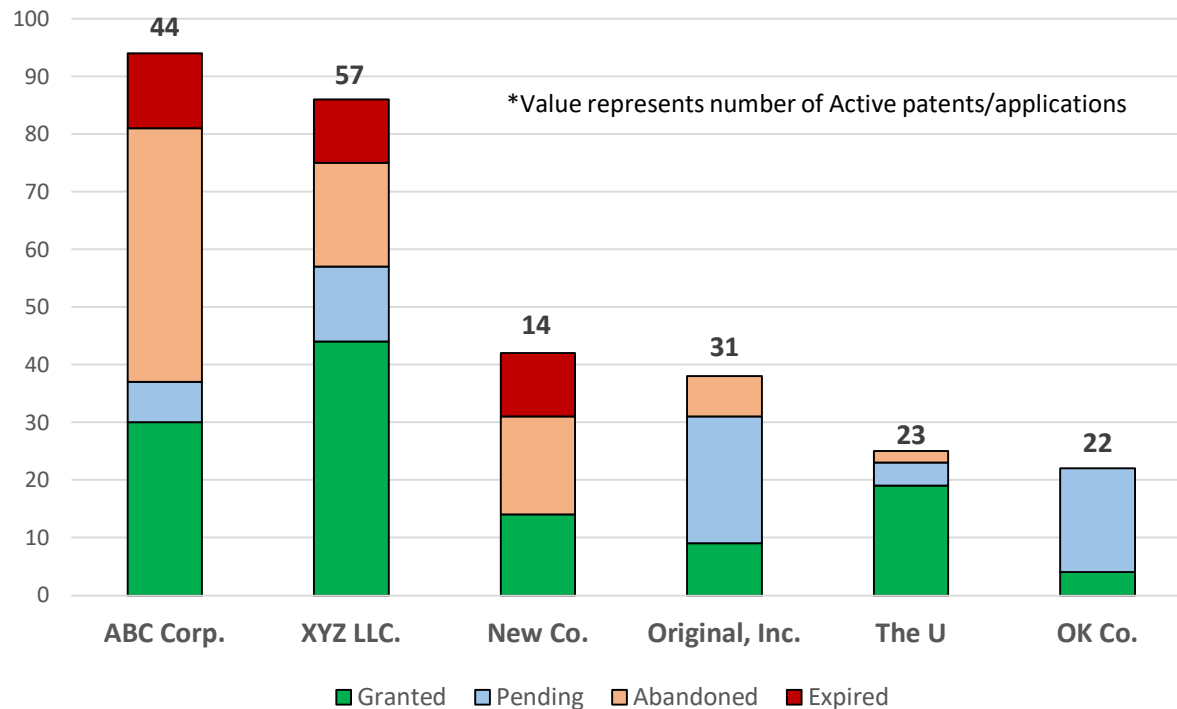
- Identify Top Players
- Identify Portfolio Characteristics
  - Expired vs. Active
  - Pending Cases Trends
  - Abandonment Rate
  - Claim Scope
- Identify Filing Trends

Top Assignees - Technology Area  
All Identified Matters Regardless of Status

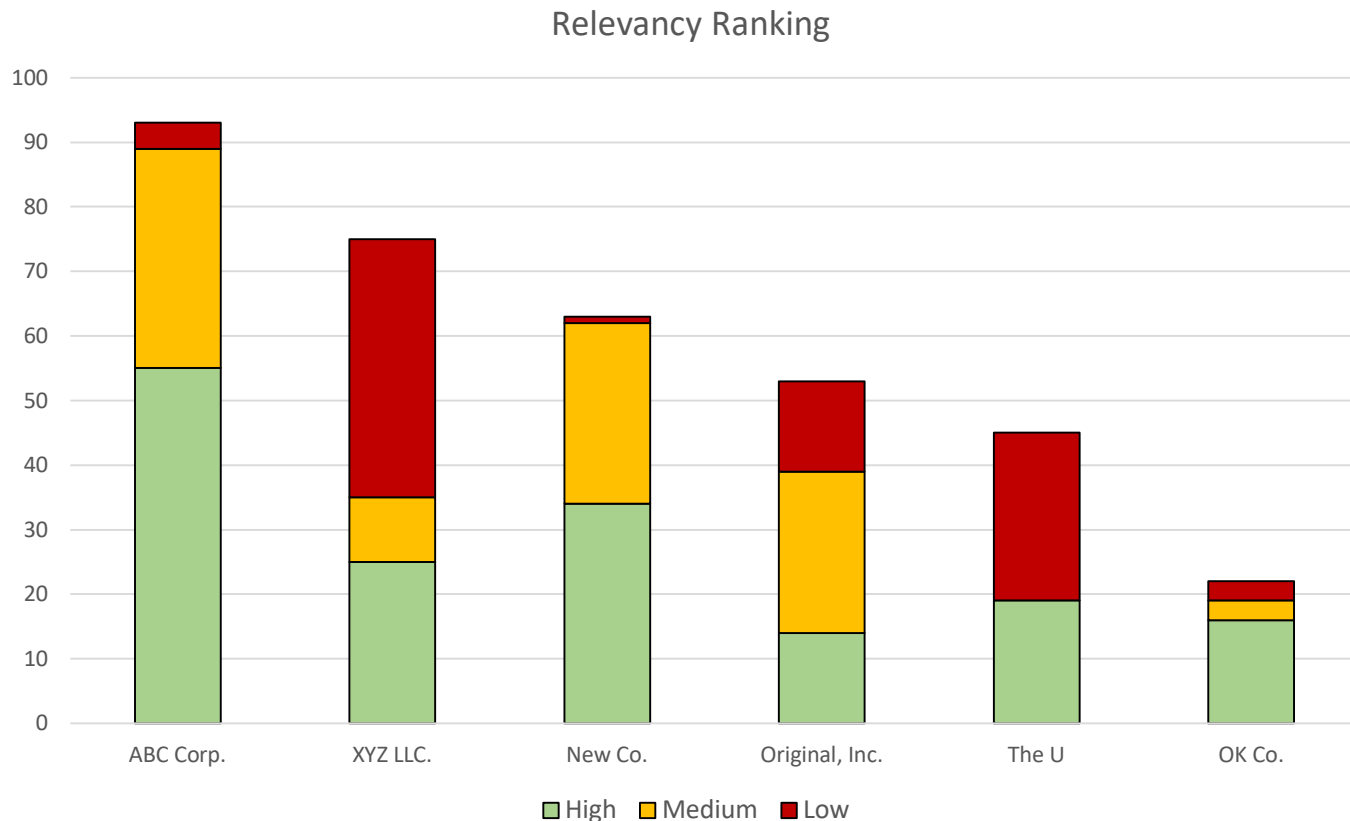


# Status Breakdown

## Legal Status Breakdown



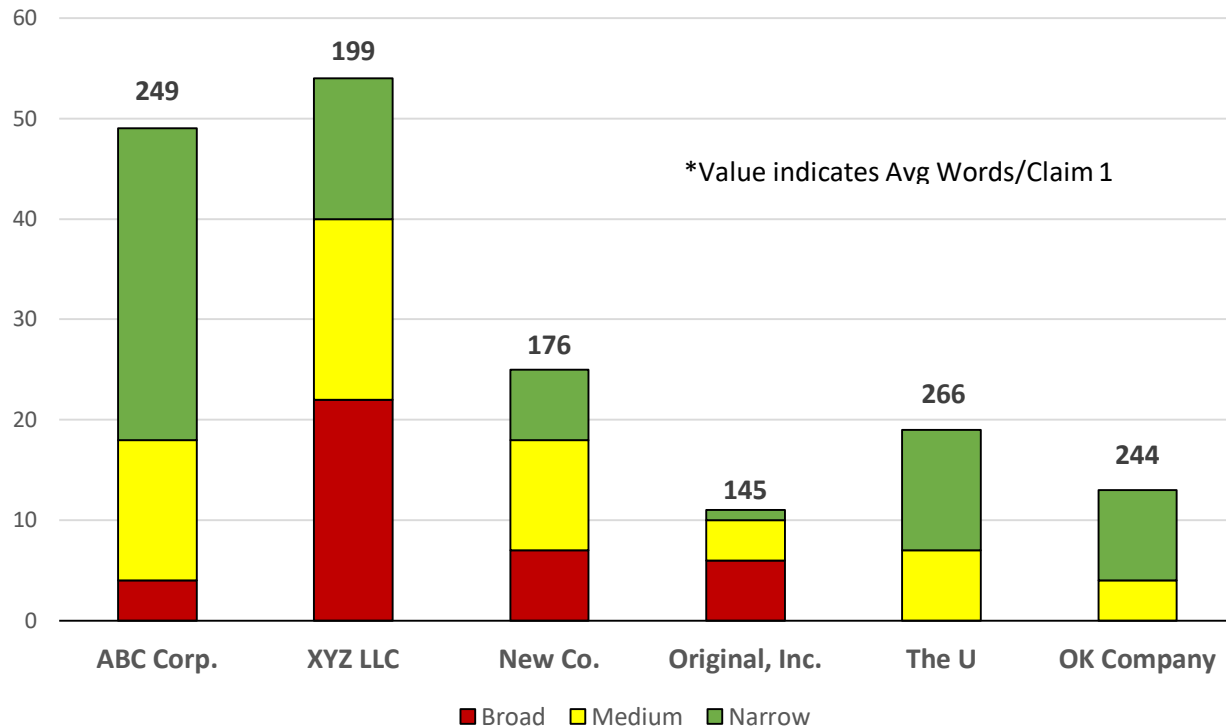
# Relevancy Ranking





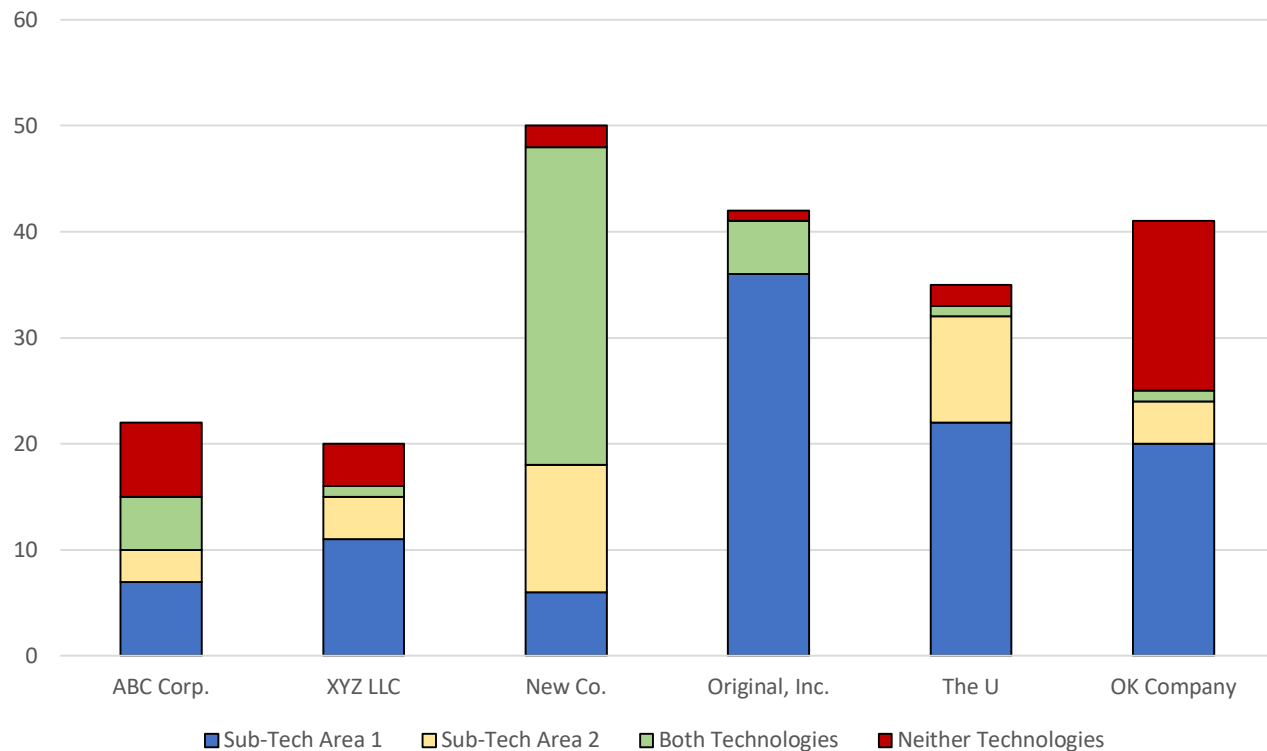
# Claim Scope Ranking

Claim Scope Ranking

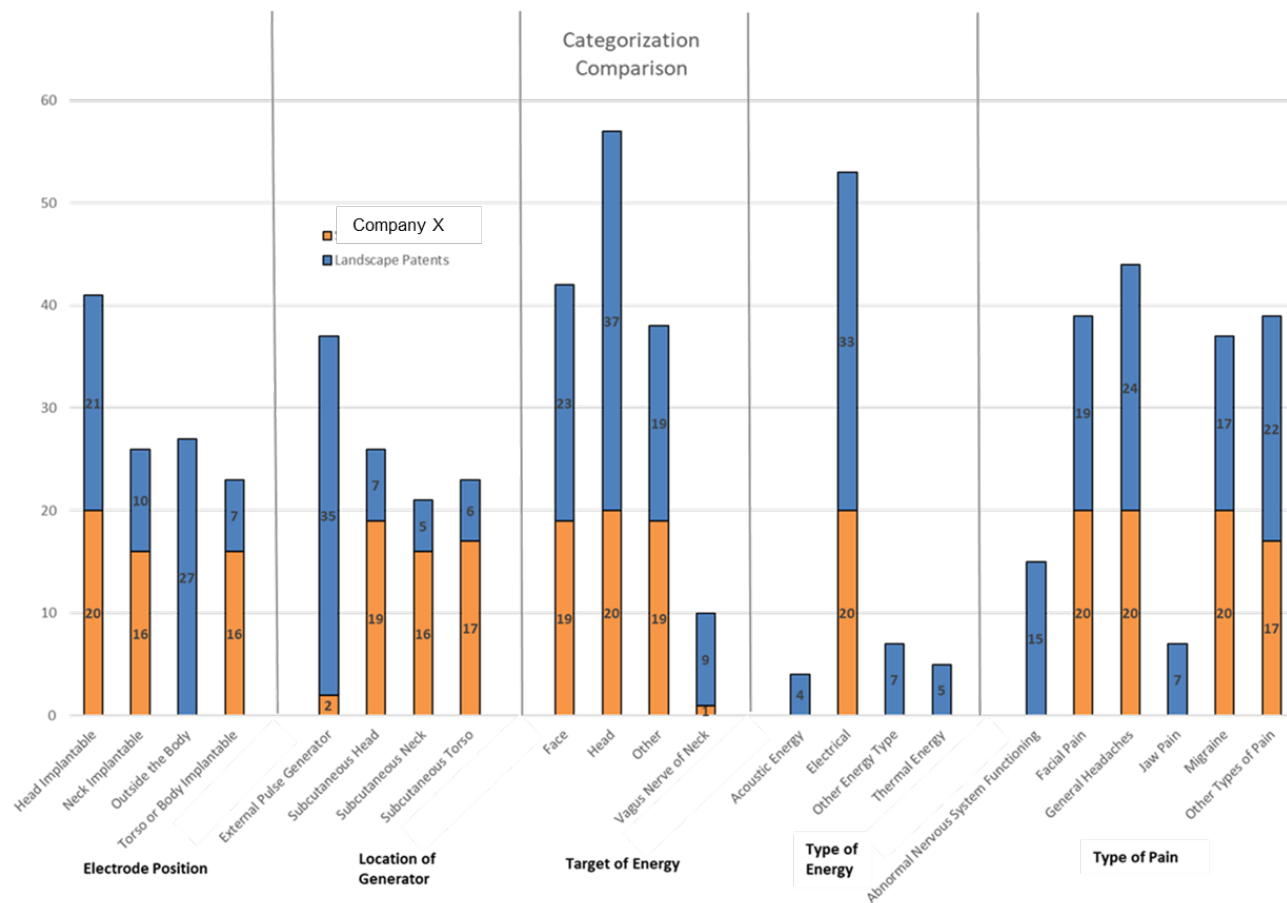


# Technology Differentiation

Technology Differentiation



# Tech Category Landscape Comparison



# Company-Level Analysis



## Filing Trends

## Key Technology Features

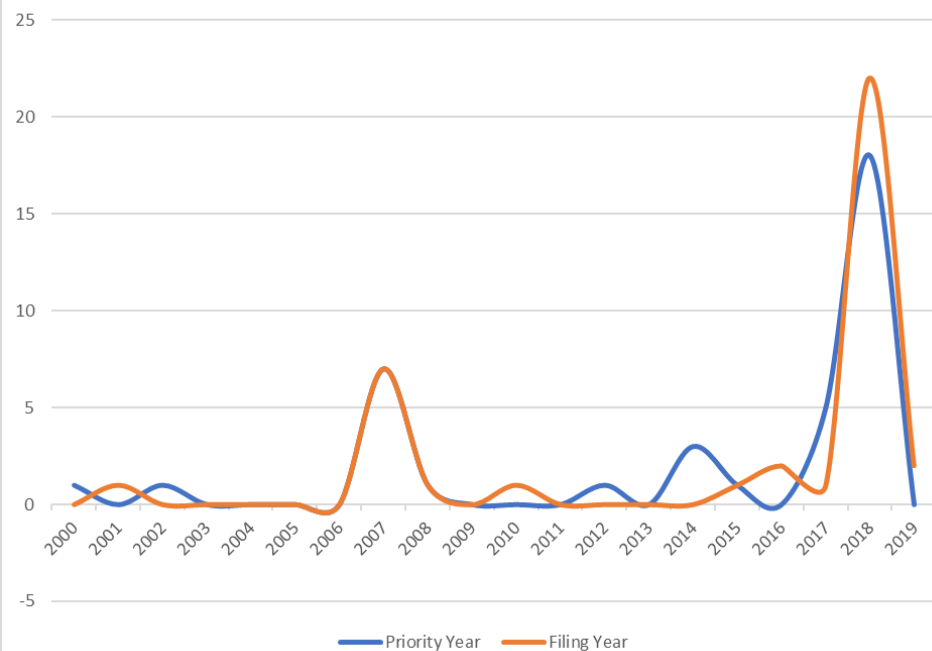
## Portfolio Characteristics

- Expired vs. Active
- Pending Cases Trend
- Abandonment Rate
- Claim Scope

## Notable Patents

## Technology Filing Trends

XYZ Priority/Filing Year Comparison



# SWOT Analysis

STRENGTHS	WEAKNESSES
<ul style="list-style-type: none"><li>• Large, strong portfolio in foundational A234 technology</li><li>• Considerably more active patents than other competitors</li></ul>	<ul style="list-style-type: none"><li>• Significant percentage of portfolio is expired or will expire soon</li><li>• High rate of abandonment</li><li>• Claim scope appears to be narrower than competitors</li><li>• Weaker patent position for C119 technology</li></ul>
OPPORTUNITIES	THREATS
<ul style="list-style-type: none"><li>• Reduce abandonment rate by implementing pre-filing screening</li><li>• Target prosecution of key applications (improve claim scope)</li><li>• Investigate partnership opportunities for C119 technology</li><li>• Investigate different applications for B665 technology</li></ul>	<ul style="list-style-type: none"><li>• Competitor 1 has a strong portfolio in A and B technologies</li><li>• Competitor 2 has substantially increased filings in A234 technology in recent years</li><li>• Smaller players filing in C119 technology</li><li>• Emerging B665 technology may disrupt A234 technology market</li></ul>



# Portfolio Curation

Customized Curation of a Portfolio According to  
Unique Client Needs





# What is it?

- Portfolio Curation is customized to the needs of the client and is performed according to a standardized methodology employing professional judgement and proprietary software tools.
- Curation organizes and classifies patents in a portfolio by product/technology, importance and value relative to a company's business, strategy and goals.
- Curation parameters such as the selection of classifications and ranking factors are specified by the client.



# Value Proposition

- Identify valuable patents for cultivation, assertion, licensing or strategic positioning
- Valuation of portfolio provides an ROI metric useful for adjusting investment in the portfolio
- Identify misaligned assets to be disposed of or dropped from renewals rolls
- Find valuable patents held by competitors or others in a given technology space for tactical awareness or acquisition





## Process and Cost

- Scoping of project and identification of key project deliverables
- Identification of technology and product categories meaningful to the company managers
- Determination of any special ranking considerations
- Automated and hands-on categorization and ranking of patents and applications in the portfolio
- Generation of Reports based on the rankings and categorizations



## Patent Curation: Why Do It?

- Generate Reports of Increasing Granularity
- Early curation generated reports for senior management of a company and its investors
- Reports included number of patents over time by country; number of patent applications over time by country; patents/applications by business unit
- Costs of patents and patent applications
- Patents/applications tagged by business unit and country



## Patent Curation: Why Do It?

- Generate Reports
- Reports for Business Unit Managers include Patents and Applications Covering Activities for Projects
- Projects May Be Directed to Products or Product Features
- Patents/Applications Tagged by Business Unit and Project
- Special Patents, i.e. Standards Essential Patents Identified
- Tagging Allows Business Unit Managers to Determine Costs of Patent Protection by Project



## Patent Curation: Why Do It?

- Generate Reports
- Scientists, Engineers, Inventors
- Claim Curation: ClaimBot—What do Company Patents Cover?
- Inventor Curation: Identify Experts within the Company—Inventors by Project
- Patent Subject Matter Curation: USPTO Classes or Internal Tags



## Patent Curation: Why Do It?

- Generate Reports
- Scientists, Engineers, Inventors
- Competitive Intelligence
- General Search of Forward and Backward Citations—Who is “drafting off” the company’s inventions; Is the Company “drafting off” the inventions of any other company

# Portfolio Curation

- Customized to the need of the client
- Organizes and classifies patents by product or technology
- Automated and hands-on categorization and ranking

Title		Patent Title	Patent Title	Patent Title	Patent Title
Patent#		Patent No.	Patent No.	Patent No.	Patent No.
Current Assignee		Patent Owner	Patent Owner	Patent Owner	Patent Owner
Filing Date		Mar 21, 2019	Nov 22, 2017	Oct 29, 2018	Aug 08, 2017
Total Claims		20	25	20	20
No. Of Claims (Independent)		3	4	3	3
Technology Category (Sorted A-Z, Asc.)	Patents Mapped	5	6	6	6
01. Tech Category 1	62				
02. Tech Category 2	19				
03. Tech Category 3	14				
04. Tech Category 4	29				
05. Tech Category 5	33				
Importance: High	54				
Importance: Medium	80				
Importance: Low	89				
Primary Product: Product 1	7				
Primary Product: Product 2	116				
Primary Product: Product 3	38				
Secondary Product: Product A	7				
Secondary Product: Product B	11				
Secondary Product: Product C	11				
Status: Allowed	11				
Status: Granted	39				
Status: Pending	176				
Scope Concepts (Sorted A-Z, Asc.)	Patents Mapped	2	1	1	1
batch ingestion of data using remote device	42				
hydration filter using charcoal or sand	21				
Key Words (Sorted A-Z, Asc.)	Patents Mapped	1	2	1	2
batch ingestion	17				
filter	70				
hydration	65				



Thank you for your interest.

# Questions?



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