

Patent Analytics How-to Webinar Series

How to Make and Use Portfolio Analytics, Patent Landscapes, and Patent Watching and Surveillance 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 25th, 2021 at 12:00 PM CT

Episode 02 – How to Make and Use Portfolio Curation, Competitive Patent Landscape and SWOT Analysis Reports
Thursday, March 25th, 2021 at 12:00 PM CT

Episode 03 – How to Make and Use Freedom to Operate Maps and Analysis, Product Coverage Analysis and Maps
Thursday, April 22nd, 2021 at 12:00 PM CT

Episode 04 – How to Make and Use Prosecution/Attorney Analytics and Examiner Analytics
Thursday, May 27th 2021 at 12:00 PM CT

Episode 05 – How to Make and Use Blue Ocean/White Space Maps
Thursday, June 24th, 2021 at 12:00 PM CT

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.



Social

Follow us on LinkedIn or go to slwip.com to see upcoming and on demand webinars.

Today's Presenters...



Steve Lundberg

Principal & Chief
Innovation Officer
Schwegman Lundberg
& Woessner



Janal Kalis

Principal
Schwegman
Lundberg &
Woessner
FTO and Patent
Analytics Expert



Andre Marais

Principal
Schwegman Lundberg
& Woessner
IAM 1000 listing of the
world's leading patent
attorneys
IAM Strategy 300
listing of the world's
300 leading IP
strategists



Milena Higgins

Chief of Data Analytics
Schwegman Lundberg
& Woessner
COO Black Hills IP
Ph.D. Physics



Tim Christman

Principal
Schwegman Lundberg
& Woessner
Former Senior
Engineer at Boston
Scientific CRM (earlier
Guidant Corp.)



Rob Stanz

Portfolio Manager
Schwegman
Lundberg &
Woessner
Patent Analytics
Expert

Episode Overview

- **Portfolio Analytics – Machine Generated**
- **Technology-Based Patent Landscapes – Machine Generated**
- **Patent Watching and Surveillance**





Software Tools Used:

Patent Searching / Analytics Reporting:

- AcclaimIP/Anaqua
- TotalPatent One[®]
- PatentBuddy[™]
- Innography[™]

Other Patent Software Used (Monitoring/Analysis)

- Patent Bots
- Patent 300[®] Dashboard



Portfolio Analytics – Machine Generated

Analytics Reports on Patent Activity related to a
Client Patent Portfolio





What is it?

- **Portfolio Analytics** are based on information available in patent and business databases.
- A **portfolio** can be defined flexibly: a group of key patents, key owner(s), a classification or group of classifications, or a defined set of search criteria
- **Portfolio analytics** provide portfolio insights based on attributes like technology, time of filing and grant, countries covered, and value/importance, and provide comparisons to other portfolios such as those held by competitors.



Value Proposition

- For a relatively low cost, insights can be gained into the relative size, strength, and value of a patent portfolio and how it compares to other portfolios.

Use of analytics lets you:

- Investigate strength and weaknesses in patent portfolios and perform gap analysis
- Use insights to adjust or devise patent and/or product strategies
- Identify possible acquisition targets



Process and Cost

- Client identifies a portfolio for the report and a set of competitors
- Reports are generated and delivered to the client with attorney observations as desired



Technology-Based Patent Landscapes – Machine Generated

Assess Competitive Position, Benchmark
Competition, and Develop IP-Rich Products and
Valuable Patent Position





What is it?

- **Patent Landscapes** similar to portfolio analytics but instead relate to patent filings in a broader technology area.
 - The owner(s) of patents of interest or key patents may not be known up-front; analyst inspects outputs and can be "guided" by where the analysis goes
- A **landscape** illustrates patents in a technology area broken down by ownership, time of filing and grant, countries covered, and value/importance, illustrating relative strength of competitor holdings in the area, as well as trends in the technology.



Value Proposition

- Similar to Portfolio Analytics – for a relatively low cost, gain competitive insights into the relative size, strength and value of patent portfolios for a given technology of interest
- Use insights to adjust or devise patent and/or product strategies
- Get early indications of competitor product strategies or strategic initiatives
- Identify possible acquisition targets



Process and Cost

- Client specifies technology to Landscape or search criteria (e.g., narrow by class, keywords in claims/abstract, etc.)
- Reports are generated and delivered to the client, optionally with attorney observations or screening as desired



Getting Started



Portfolio Analytics Information Needed:

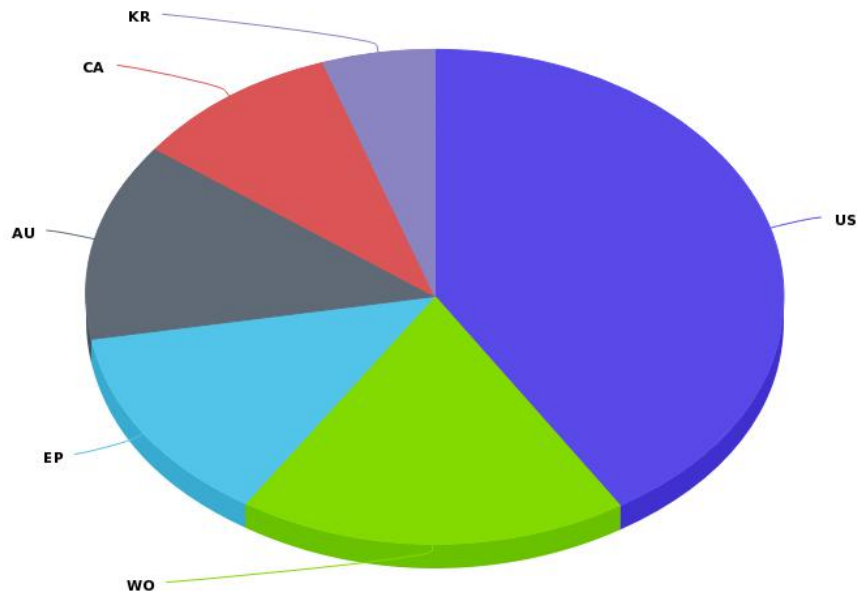
- **Assignee(s)**
 - **Including Parent Company or Subsidiary Info**
- Countries of Interest
 - US Only / All Countries / Country Specific
- Status Specifications
 - Active Only / All Matters Regardless of Status
- Date Specifications
 - All Time / Last 5 Year(s) / Last 10 Year(s)
- Other

Landscape Analytics Info Needed:

- **Description of Technology Area**
 - **Keyword(s), Companies of Interest etc.**
- Countries of Interest
 - US Only / All Countries / Country Specific
- Status Specifications
 - Active Only / All Matters Regardless of Status
- Date Specifications
 - All Time / Last 5 Year(s) / Last 10 Year(s)
- Other

Top Patenting Countries

Top Patenting Countries

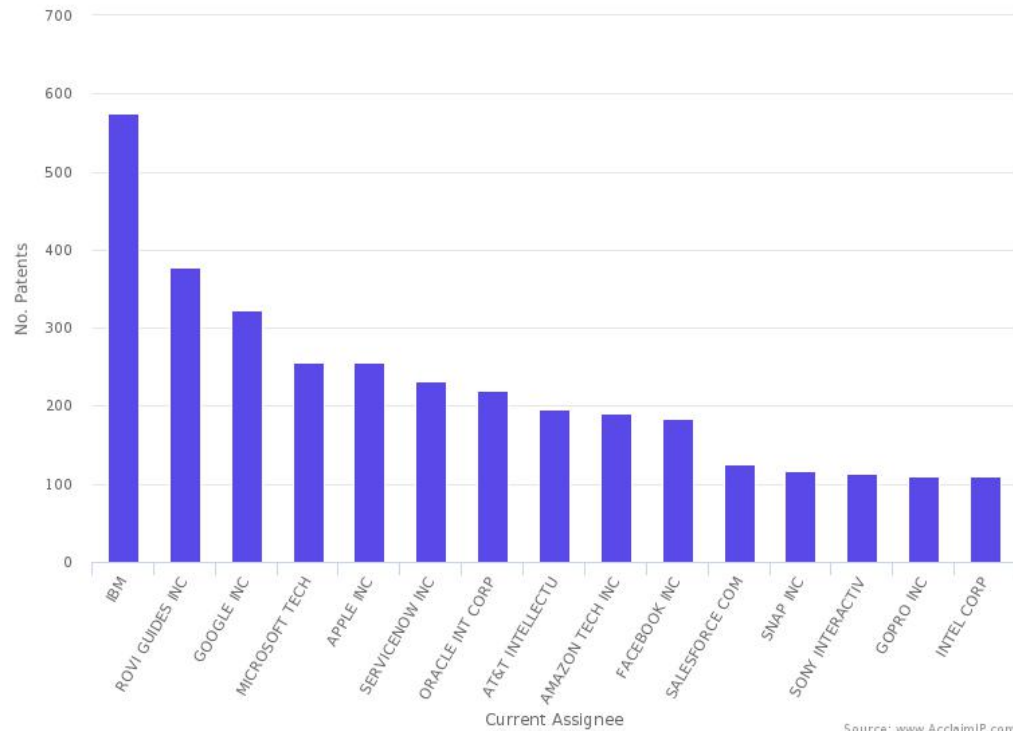


Top Assignees

Similar to:
Top Inventors
Top Agents

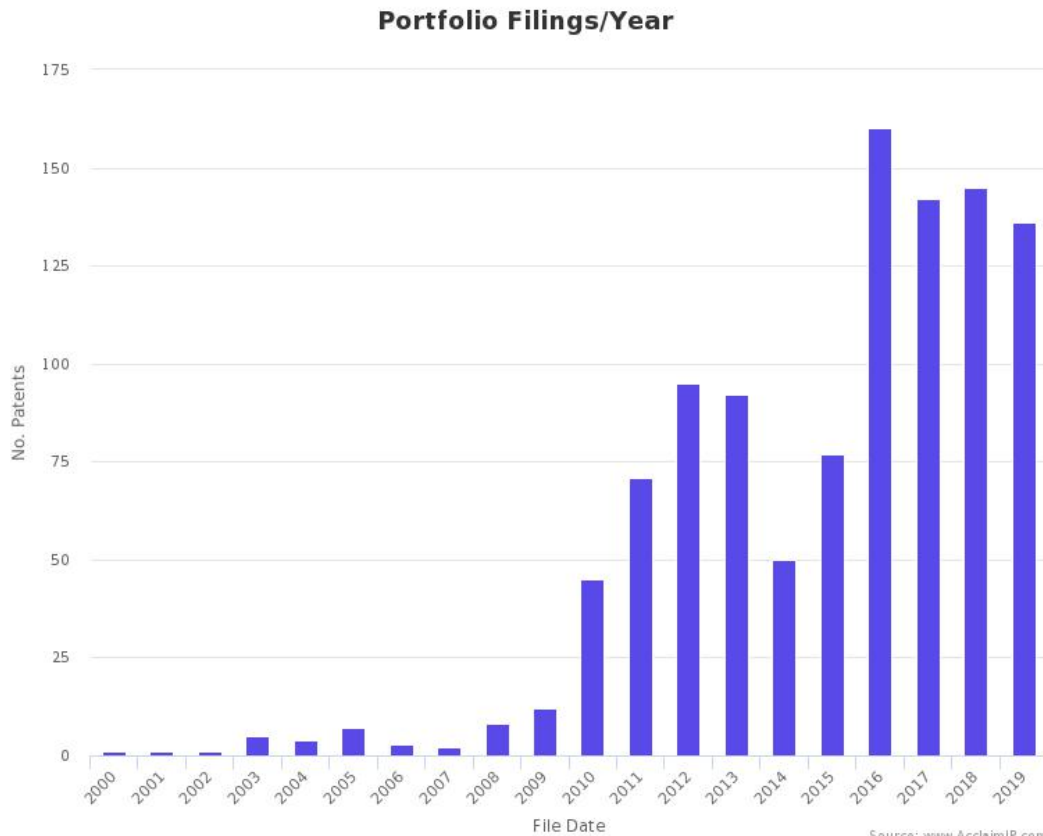
Top Patent Assignees

in Specified Technology Area



Date Charting

- Priority Date
- Filing Date
- Published/Grant Date

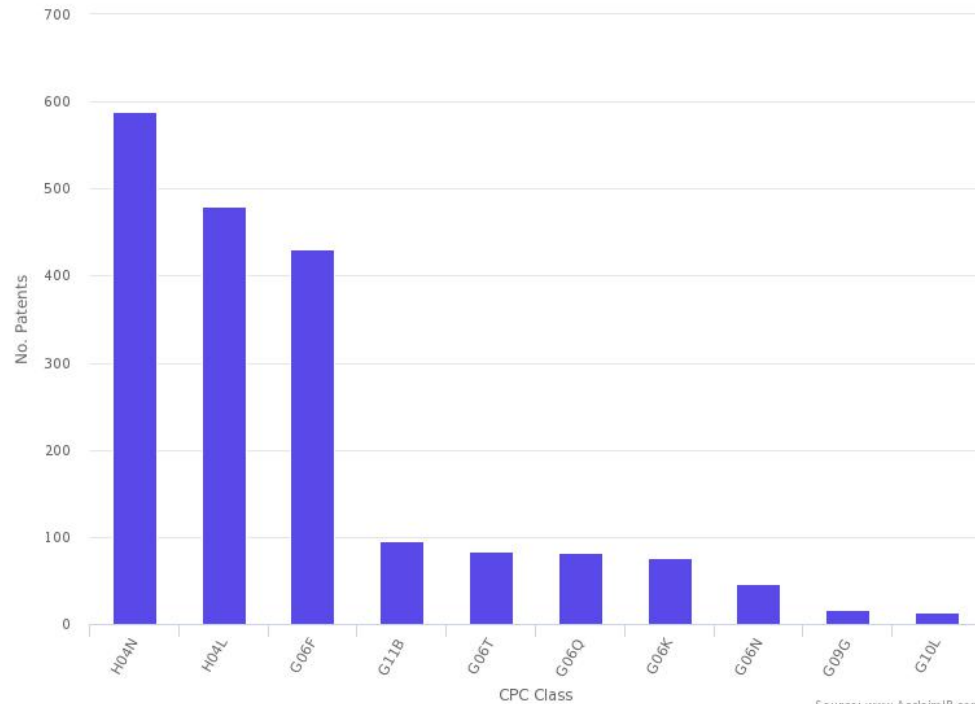


Top Classifications

- CPC / IPC
- Ranking at all class levels (Section to Complete class)
- First Only or All mentions of class available
- Class Titles Exportable

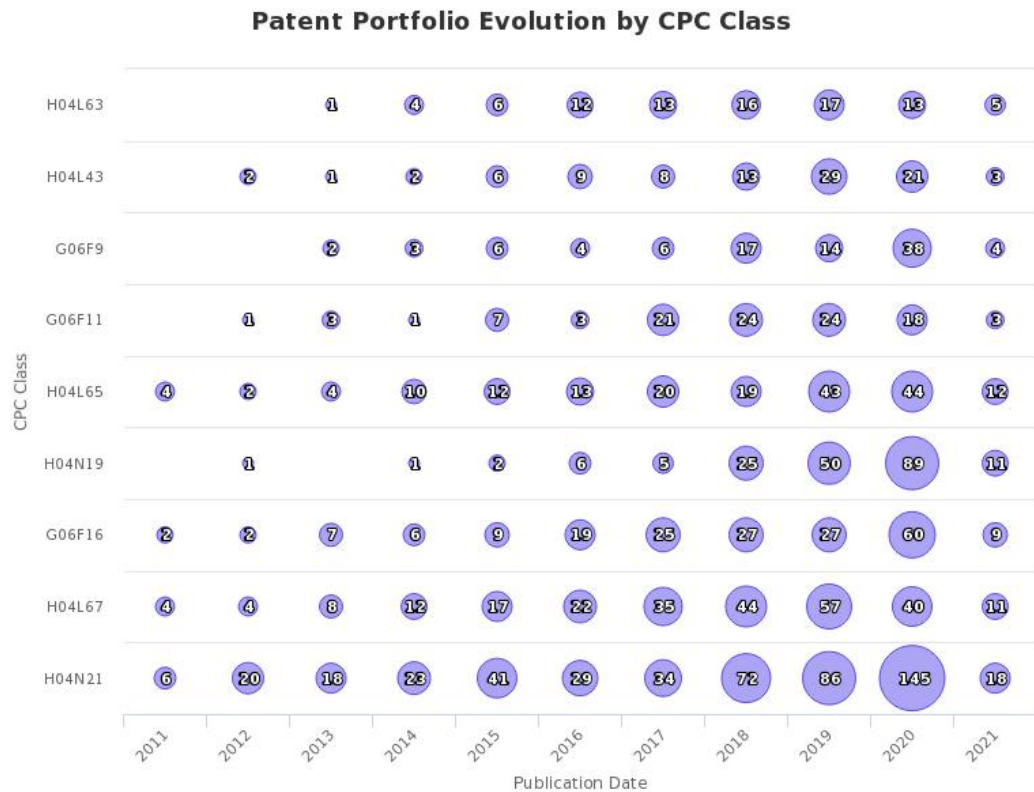
Top CPC Class

Ranking of Top Subclasses



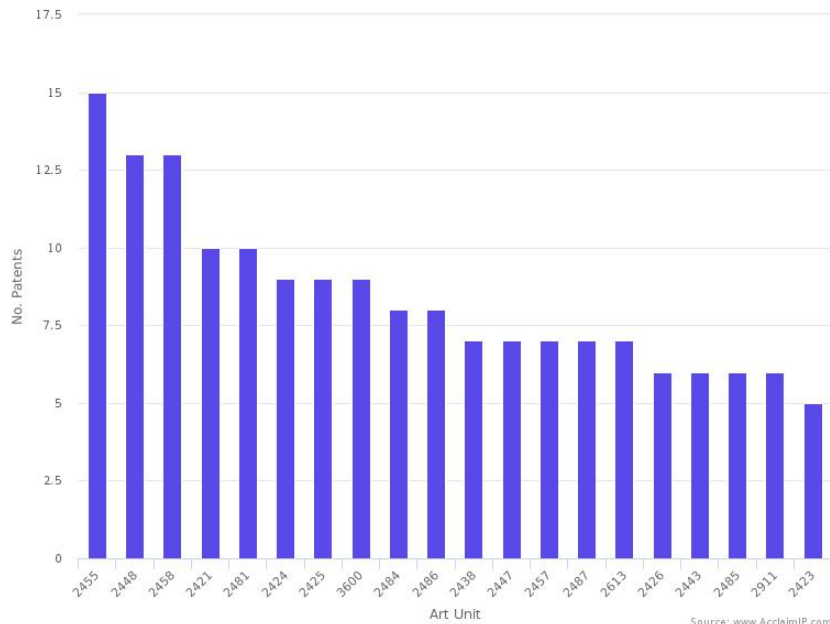
Source: www.AcclaimIP.com

Portfolio Evolution by Class

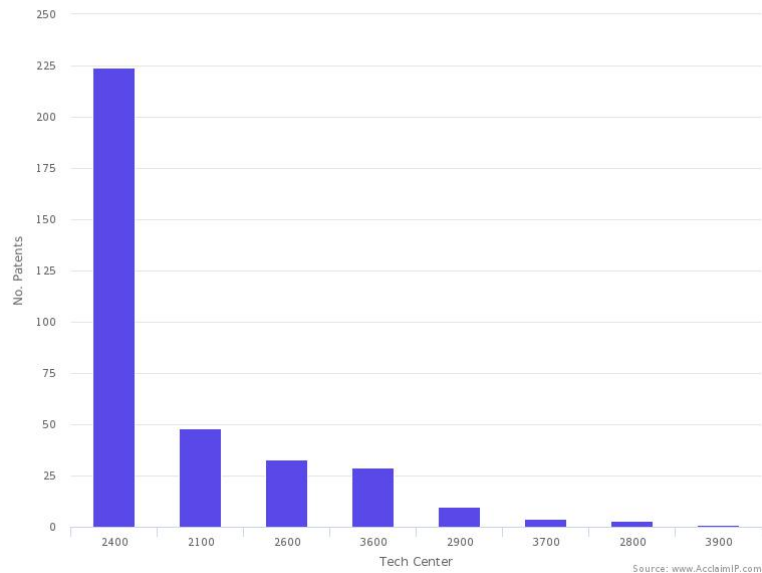


Top Art Unit / Tech Center

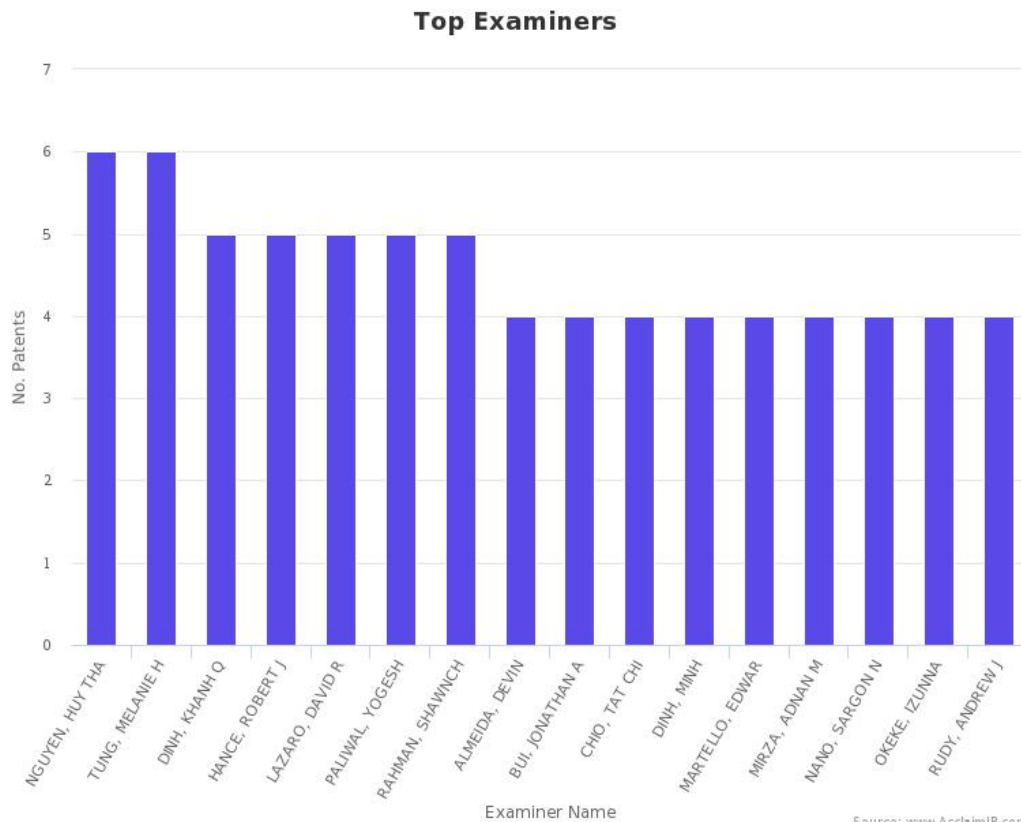
Top US Art Unit



Top US Tech Center



Top Examiners



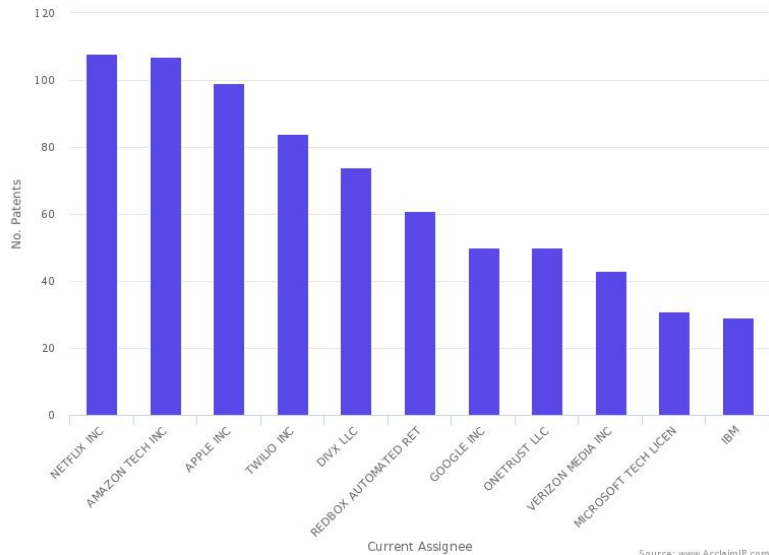
Examiner Name

Source: www.AcclaimIP.com

Citations

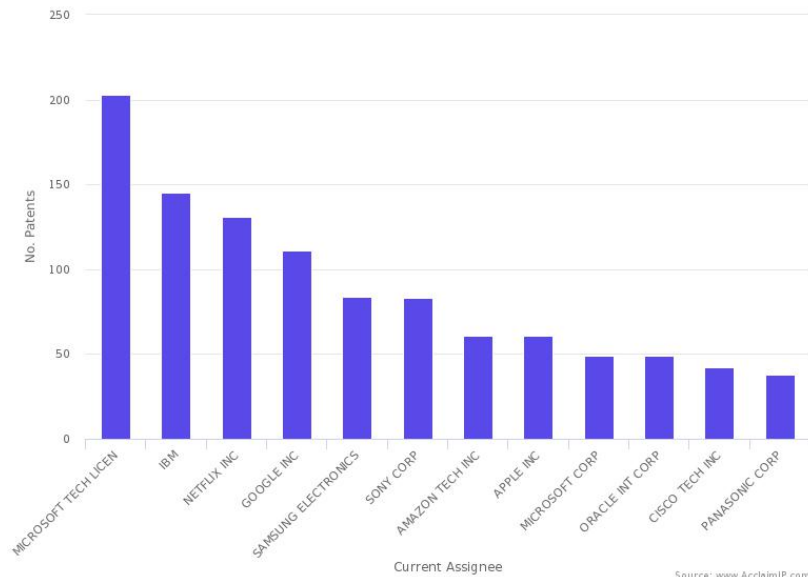
Forward Citations

Companies Citing Portfolio



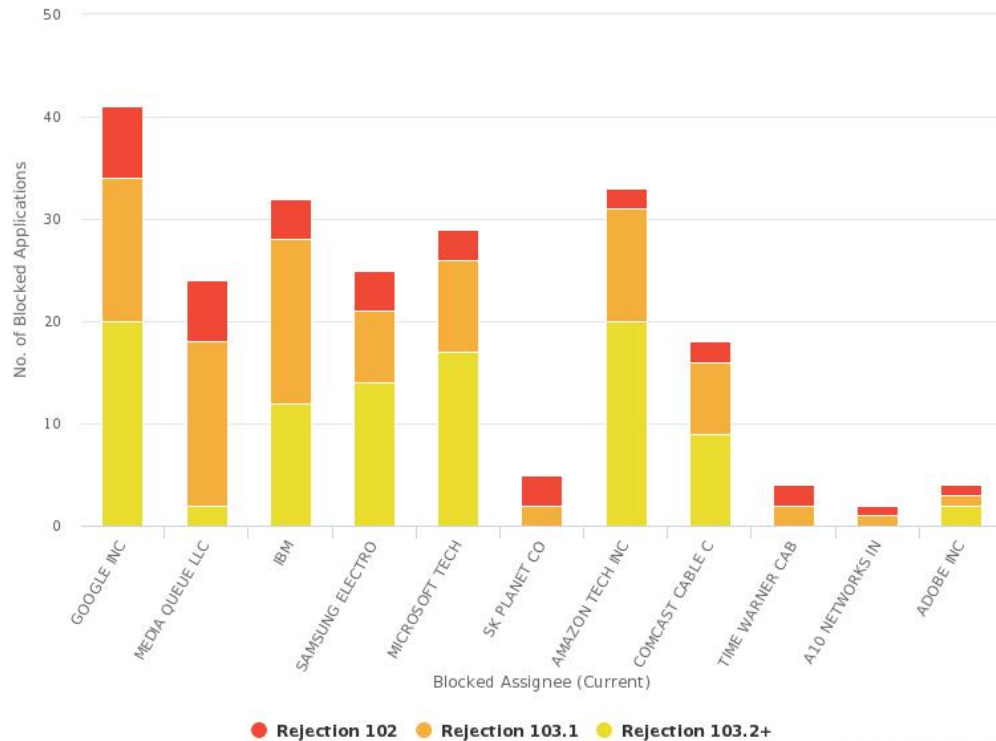
Backward Citations

Companies Portfolio is Citing



Rejections (Blocked/ Blocking Assignees)

Top Blocked Assignees by Number of Blocked Applications

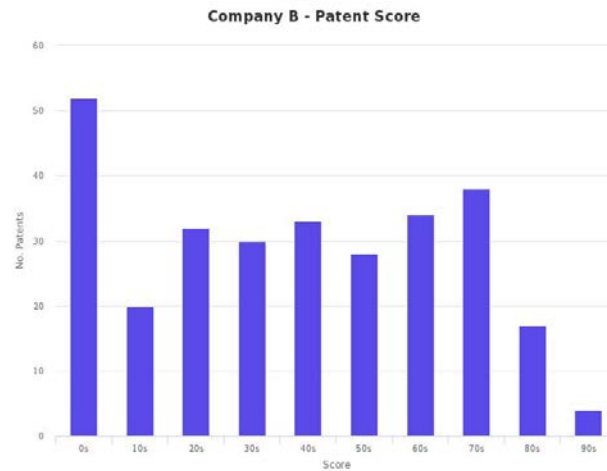
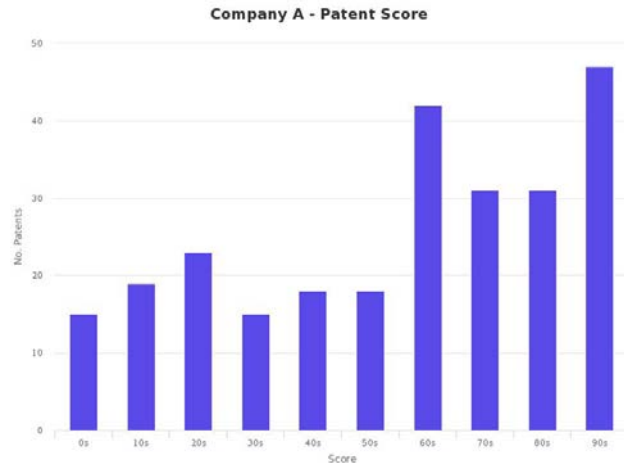




Patent Score

- Automated
- Citation Score
- Legal Score
- Technology Score

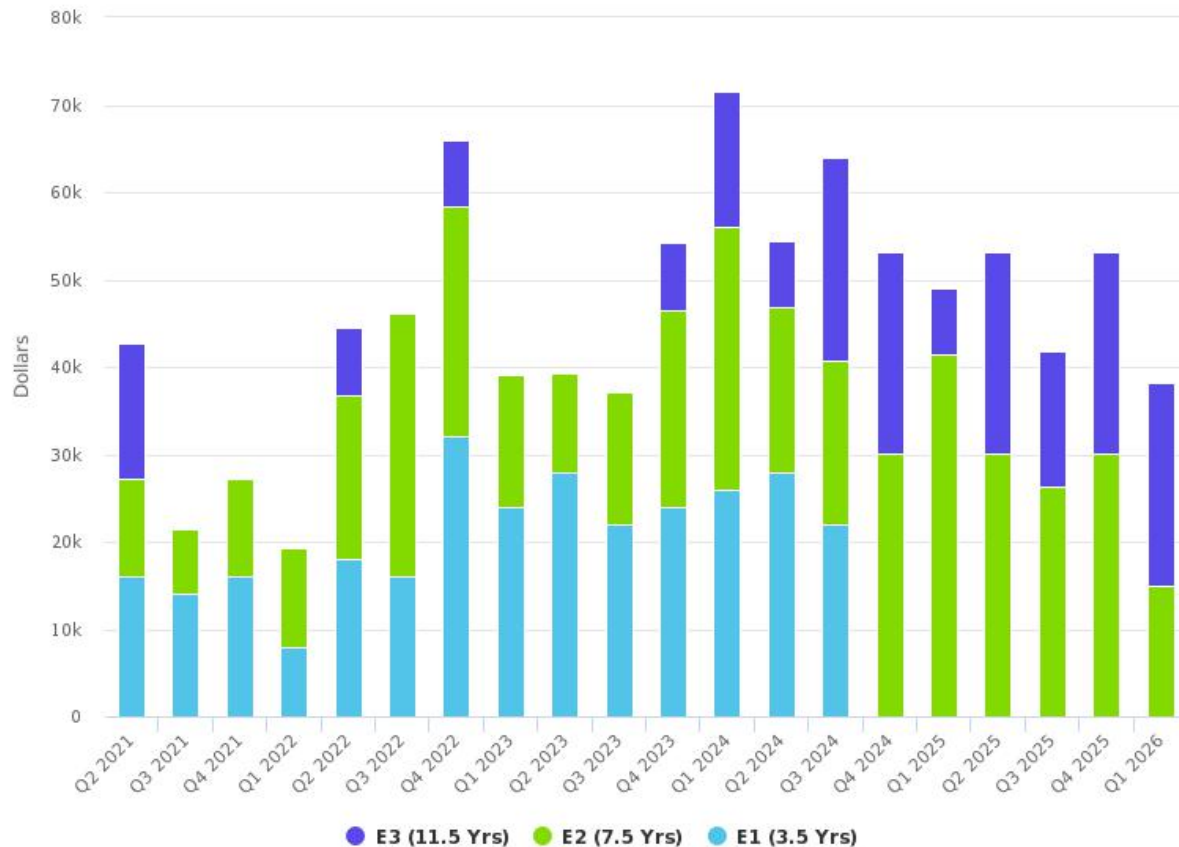
 86 Patent Score	 99 Citation Score	 Remaining Life: 6.32 Years
	 47 Legal Score	 Number Claims: 57
	 40 Technology Score	 Forward Citations: 2250
		 Family Size: 12
		 Remaining Maint: \$7,400



● Patent Score

US Maintenance Fees by Calendar Quarter

*Based on upcoming maintenance fee payment due dates



Black Hills Renewals / Dashboard Features

Budgeting

[Export Report](#) 

Plan:

Country:

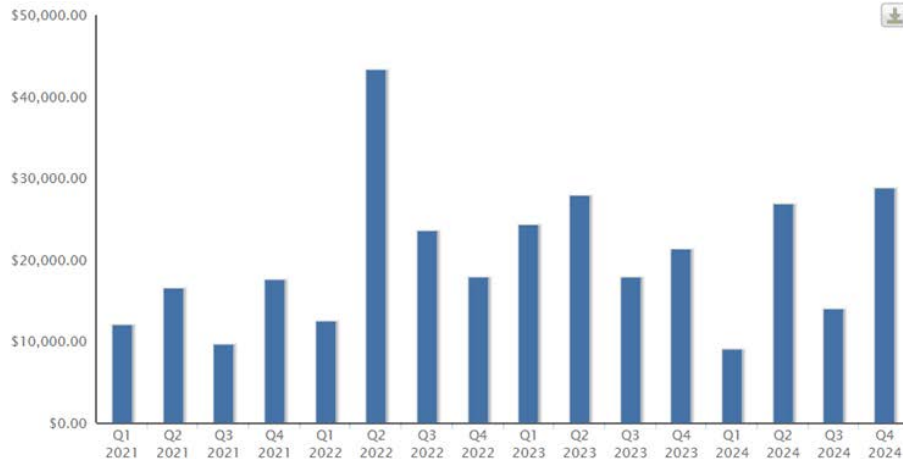
Year Range: to

Confidence: Tag: Breakout by Tag:

Show By: Date Type:

\$ 323,316.22 Total Fees

347 Number Of Renewals





Patent Watching and Surveillance

Periodic Updates on Patent Activity Related to a Client or Competitor Portfolio Generates Actionable Information





What is it?

- Watching and Surveillance provide ongoing monitoring of "news" concerning a patent or portfolio of patents such as new citations of a particular patent or portfolio by other patents, new applications filed by competitors that bear a close relationship to your own portfolio, new developments in the prosecution of key competitor patent applications, and patents filed by ex-employees that may indicate misappropriation
- **Consider:** consult with counsel concerning implementation of surveillance



Value Proposition

- Improve strategic and tactical awareness
- Obtain early indications of competitor IP or potential competitive activity
- Monitor ex -employees for compliance with nondisclosure invention assignment agreements
- Identify possible infringing technologies



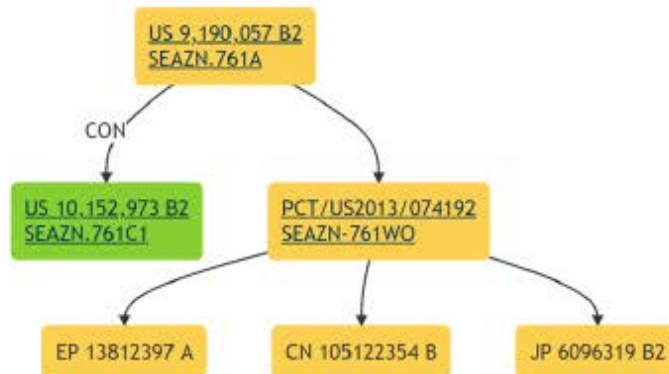
Process and Cost

- Client specifies companies, individuals to watch and/or selects individual patents or families
- Reports are generated and delivered to the client with attorney observations as desired.

Patent Family Tree

The current patent is in green. Hover over a U.S. patent to see the patent title, and click on any U.S. patent to go our PatentPlex page for that patent.

Our patent data sources sometimes have mistakes. You should confirm relationships before relying on this data.



Speech Model Retrieval In Distributed Speech Recognition Systems

Overview Family List IFW Proofread

Application Data

Applicant:	Amazon Technologies, Inc.
Status:	Patented Case
Examiner:	Le_Thuykhanh has a grant rate of 62%
Art Unit:	2658
Docket Number:	SEAZN 76101
App. Number:	14/942,551
Priority Date:	2012-12-12
Filing Date:	2015-11-16
Pub. Number:	US20160071519A1
Pub. Date:	2016-03-10
Patent Number:	10,152,973
Issue Date:	2018-12-11
Expiration Date:	2032-12-12 including PTA of 0 days (* we do not check for terminal disclaimers)

Patent Tools

Review this patent similar to the Google patents dashboard but better!

[Patent Analyzer](#)

Generate a claim chart for an infringement or invalidity analysis.

[Get Claim Chart](#)

Direct Links

- [Publication at Google Patents](#)
- [Issued Patent at Google Patents](#)
- [Publication at USPTO](#)
- [Issued Patent at USPTO](#)
- [USPTO Assignments Database](#)
- [USPTO Maintenance Fee Payments](#)
- [Espacenet](#)
- [USPTO Global Dossier](#)
- [USPTO Patent Center](#)

US Prosecution Analytics

Application Publication: US20180370375 A1 Related Docs: 83 Application Serial No.: 16/015341 Status: ACTIVE

APPARATUS FOR CHARGING A PLURALITY OF ELECTRIC VEHICLES

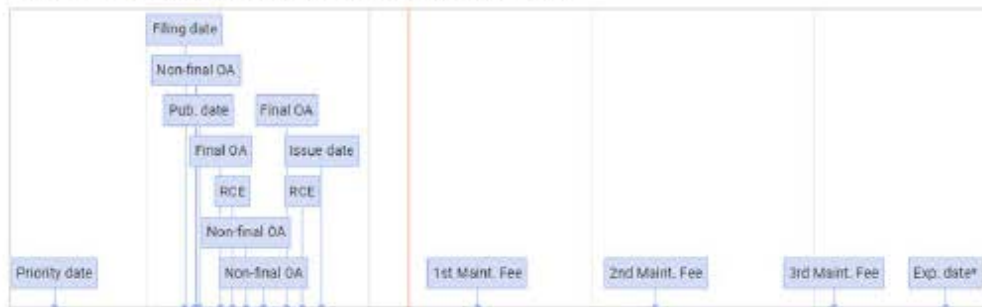
An apparatus for charging a plurality of electric vehicles, wherein the apparatus has a charging module, wherein the charging module is operatively connected wherein the cooling component is designed in such a way that, for the purpose of carrying away the waste heat from the charging module, a medium which heat is transported through a line which is routed in the ground.



Tech Center	Art Unit	CPC Class	Examiner	Current Agent
2800	2859	B04L53/302	TORRES RUIZ, JOHALI ALJANDRA	RATNEPRESTIA

Patent Timeline

See events for this patent below. You can use your mouse to zoom and move the timeline.





Thank you for your interest.

Questions?



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