

# Intellectual Property Management Clinic for SMEs

March 26<sup>th</sup> 2024, Lisbon,  
Portugal



# Objectives of the Program



Supporting selected SMEs/Startups, to make effective and strategic use of IP in support of their businesses through personalized expert advice



Enriching SMEs IP Knowledge through training and access to WIPO practical tools and resources



Exchange experience, learn from each other



Showcase lessons learned and key takeaways

# Program Components

## Mentorship



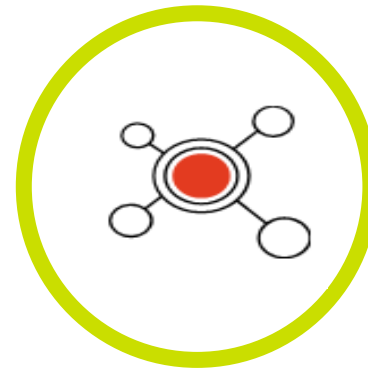
one-on-one mentorship  
(minimum 3) with IP  
and Business expert(s)

## Training



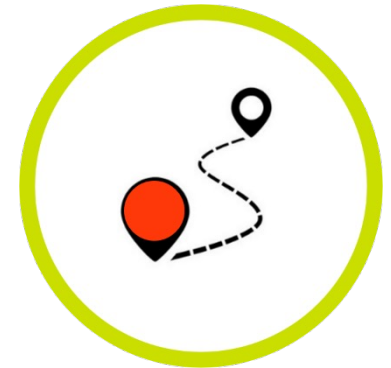
Training opportunities,  
with access to practical  
tools and resources  
(including IPBD tools  
and online workshops  
by selected experts)

## Networking



Access to public  
events,  
networking  
opportunities

## IP Roadmap



companies receive  
roadmap of IP strategy  
development with  
recommendations

# One-on-one Mentorship



*Assignment and work with experts is based on companies needs and experts' fields of expertise*

## IP Experts tasks:

- Helping to take stock of company's IP
- Formulating an IP strategy
- Providing actionable recommendations

## Expertise of IP Experts:

- Advisory on IP issues in overseas markets
- IP monetization
- IP intelligence and audit
- IP strategy and IP portfolio management
- IP valuation and financing
- Branding and franchising

## Features

- Confidentiality
- Flexibility in setting out meetings, e.g., date length, virtual /in-person

# One-on-one mentorship

## Sharing of Information through the Interview process (list non-exhaustive)

- ✓ Presentation (business model and business strategy)
- ✓ Your goals (short-term and medium term) and expectations
- ✓ Markets that you are interested in
- ✓ Existing IP portfolio
- ✓ Known competitors
- ✓ R&D (current, future plans/interests)
- ✓ Core team, roles & responsibilities
- ✓ Financial situation
- ✓ Competitive landscape (competing companies and/or competing technologies)



**Identify your business opportunities  
and risks associated with IP**



**Look at the list of actions to be  
considered when developing your IP  
strategy**



*Scan the QR codes to access the tools (in Portuguese)*

# Training



*Strengthen SMEs  
understanding of IP  
and its strategic  
implications*

Various training opportunities to upskill and certify SMEs IP knowledge:

- Access to **eLearning modules offered by the WIPO Academy**
- **Workshops** (live virtual or in person workshops, conferences) on topics of interest for the companies
- Use of **IPBD Tools and Resources** for Business

*Up to 4 online workshop events covering selected business and IP related topics to be presented by the experts*



The training sessions address common to all companies IP, business and legal issues and questions emerged from the work with experts including case studies

## **The experts will cover the following areas of IP Management, Commercialization and Internationalization**

- IP Protection (portfolio management/evaluation)
- IP Commercialization (licensing, selling, franchising, contracts etc.)
- IP Management (strategic and systematic handling of IP assets)
- IP Risks (Research, Confidential information, Ownership, Monitoring, Litigation, Enforcement)
- IP Focused Financials (IP valuation, IP budgeting, etc.)
- Global IP protection (IP expansion)
- IP and Business touch points (Integrated IP strategy with business strategy, marketing and branding strategies, internationalization)





# IP Roadmap

## A comprehensive report

- ❖ SME business model general description
- ❖ Competitive landscape
- ❖ IP and IA identified ( Use of IP searches)
- ❖ Assessment of status of IP strategy
- ❖ IP portfolio & business model fit
- ❖ Main IP issues and actionable recommendations



# Expected contribution from selected Startups

- Actively participate to derive benefits / good outcomes
- **Time commitment**
- Provide Information on current business and IP situation (as requested by mentor under confidentiality)
- Share feedback about the program, including the lessons learned and key takeaways



# MANAGING EXPECTATIONS

## What is this program?

(Depending on needs of company, non-exhaustive list)

- Assessment of existing intangible assets and IP management strategy
- Advice and guidance on IP strategy and commercialisation
- Valuation guidance
- Legal advice
- Identification of areas for improvement
- Actionable recommendations

## What is not this program?

(non-exhaustive list)

- Pre-filing searches
- Drafting and filling IP rights applications
- Drafting contracts
- Full valuation for financial reporting / capital raising
- Performing licensing negotiations
- Any legally binding advice or legal disputes

# Timeline

