

**PIUG 2009 Annual Conference Workshop**  
**Automating Patent Analysis:**  
**Tricks, Tips and Techniques from Around the World**

Thursday, May 7, 2009: 11:30 AM – 2:30 PM

**Abstract**

Patent information analysis and patent analytics are important decision-support tools for organizations struggling to compete within their competitive landscapes. However, the volume of intellectual property filings that require analysis can be daunting: in 2008, nearly 6,000 new applications published and more than 3,500 patents were granted each and every week of the year in the US alone.

Patent analysis does not need to be a manual process or begun from scratch with each new project. Data that was cleaned once does not need to be cleaned again. Categorized records from a previous project can inform new categorizations, enabling machine learning. Maps and visualizations can be updated without re-rendering. Reports and underlying data can be archived and accessed efficiently as part of intelligent workflows.

Most significantly, patent analysis is being automated all over the world. From patent offices to corporate IP departments to law firms to consulting teams, analytics workflows are being originated and evolved by many. In this unique workshop – and for the first time – their collected knowledge will be shared.

Workshop participants will explore commercial and proprietary tools as well as customized approaches and rules of thumb. The information will be presented using lecture, demonstration and case study methods.

Key tricks, tips and techniques for automating patent analysis, gathered from around the world, will include:

- Concept extraction from patent documents
- Identifying highly similar patents from multiple authorities
- Estimating a patent's survival in opposition
- "Guessing" the true assignee/owner of a patent
- Building intelligent family groupings when family data varies
- Identifying the most likely licensees of a patent or portfolio
- Identifying critical invalidating references to a patent
- Investigating the litigation history of a patent or portfolio
- Building patent claim trees
- Generating patent claim charts
- Web-based automated patent mapping
- Animating time-sliced map data for patent trend discovery

By the end of the workshop, takeaways will include new approaches to:

- Assessing patent portfolios for competitive, strategic or litigation purposes
- Developing visualizations of patent landscapes and technology trends
- Organizing patent data to increase certainty in investment, development and enforcement decisions
- Leveraging the efforts and knowledge of global patent analysts to apply their hard-won insights to ongoing efforts in your organization

### **Instructor Biography**

Barry Brager is the founder and Managing Partner of Perception Partners, [www.perceptionpartners.com](http://www.perceptionpartners.com) a global intellectual property research, transactions and consulting firm. Perception Partners engages more than 200 business, technical and legal experts to quantify critical matters of risk and value in technology investment, business development, and IP enforcement decisions.

Perception Partners systematically analyzes the world's available science, business and legal facts to provide actionable decision-support solutions that maximize the value derived from innovation and intellectual property. Tools developed and optimized by Barry and his team have been used to analyze more than 250,000 patents worldwide and which have supported decisions related to more than \$1 billion in financial transactions.

Barry is active in the IP industry most recently as the chair of the Small Business Committee of the Intellectual Property Owners Association and the co-chair of the Licensing Executives Society Annual Meeting in 2008. In these groups and others, Barry is a frequent speaker on patent analytics and innovation strategy.

Barry graduated in 1992 from Temple University, and in 2003 completed Emory University's top 10 globally-ranked Executive MBA program, graduating first in his class.

### **Logistics**

*Date:* May 7, 2009

*Time:* 11:30 AM – 2:30 PM

*Location:* TBD

*Registration Cost:* \$295.00 before April 15; \$395 thereafter

*Lunch:* A nutritious boxed lunch with multiple sandwich options, as well as a cold beverage selection, will be provided to all Workshop participants.