

IP Strategy Checklist - <https://www.wipo.int/portal/en/index.html>

Stage I. Ideation process - Generating and developing ideas	
1. Commercial application - Does the idea/concept have commercial application?	
2. Identifying intellectual property assets - Does the business have processes and/or procedures for <u>identifying IP assets</u> within the business? (IP Audits, due diligences and utilizing IP checklists)	
3. Capturing intellectual property assets - Does the business have processes and/or procedures for <u>capturing IP assets</u> ?	
4. Confidential information - Does the business have processes and/or <u>procedures for preventing disclosure of the idea/concept</u> ? (NDAs, trade secrets, restricted access, other agreements)	
5. Likelihood of intellectual property protection - Does the business have processes and/or procedures to identify the likelihood of obtaining IP protection (preliminary patent, design, trademark, copyright)?	
6. Partnerships - Does the business have potential partners to collaborate with in the development and commercialization of the idea/concept? When collaborating with third parties, has/will the business secure ownership or access to the IP?	
7. Identifying competitors - Does the business have processes and/or procedures to identify competitors or the likelihood of infringing third party rights by applying the idea/concept?	
Stage II. Product / service development - Commercial and market analysis	
1. Freedom-to-operate search - Does the business conduct IP landscape, Freedom to Operate (FTO) searches or competitor analysis to identify any potential competing IP rights or technologies?	
2. Intellectual property searches - Does the business conduct regular IP and technology searches to determine the likelihood of obtaining IP protection for the incremental innovations or improvements?	
3. Third party rights - Does the business have processes and/or procedures for addressing IP ownership considerations when collaborating with third parties to develop its product and services? (marketing, employer, R&D, licensing agreements)	
4. Intellectual property strategy implementation - Does the business have technical or an IP review committee to decide on product or service development, taking into account the overall business and IP strategy?	
Stage III. IP Protection - Generating and developing ideas	
1. IP protection strategy - Has the right protection strategy been identified? (i.e., patent, trade secret, design, trademark, copyright IP).	
2. Prioritization of IP protection - Does the business	

have processes and/or procedures for prioritizing IP protection?	
3. Technology landscaping - Does the business conduct IP searches and/or technology landscape studies for patent, design, trademark, been conducted before seeking protection?	
4. IP Strategy Development - Does the business have processes and/or procedures for developing an IP strategy including market, cost or timing considerations?	
5. Monitoring ownership - Does the business have processes and/or procedures for monitoring inventorship, authorship and ownership considerations?	
6. Non-registerable IP Protection - Does the business have processes and/or procedures for protecting non-registerable forms of IP know-how, trade secrets, goodwill etc.	
7. Intellectual Property advice - Is advice sought from IP professionals before seeking IP protection?	
8. IP Strategy alignment - Is the IP strategy aligned with the commercialization strategy?	
Stage 4: IP Commercialization - Market entry	
1. Commercialization vehicle - Does the business have processes and/or procedures to identify the appropriate commercialization vehicle? (manufacture, sale, license, etc.)	
2. IP asset valuation - Does the business have processes and/or procedures valuation of IP assets, especially for those to be licensed as part of business model / pricing strategy for products? (e.g., claim charting vis-à-vis competitor products/services)	
3. Freedom to Operate - Has a Freedom to Operate search been conducted to determine the potential to infringe third party rights?	
4. Competition monitoring - Does the business have processes and/or procedures for monitoring competitor activities, potential commercialization partners or enforcement of IP rights?	
5. Branding - Is the product and/or service appropriately branded (trademark, packaging, websites, domain names)? Is descriptive or distinctive branding considered?	
6. IP review - Does the business have an IP & innovation review board within company to periodically review IP assets, portfolio structure, new innovations & disclosures, competitive landscape, IP budget, etc.?	
7. IP audit - Does the business have processes and/or procedures for periodic audits of all IP assets and portfolio optimization, portfolio pruning, possible divestitures?	
8. IP policy and education - Does the business have processes and/or procedures for periodic IPR and IP policy and education trainings for employees?	