



# Maximizing Performance and Impact of IP Management in the Digital Age

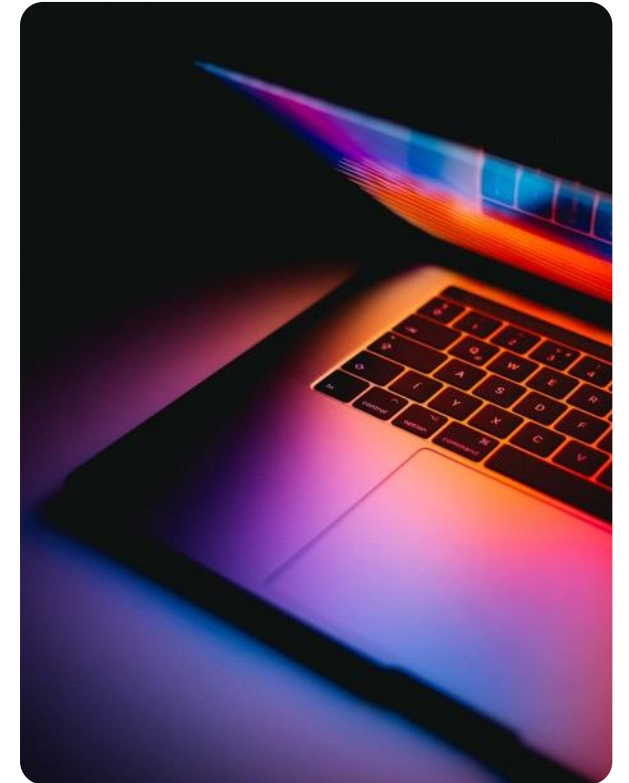
EU IPF - Berlin April 27th 2023



**Nathalie Mantrand-Foussadier**  
*Regional Sales Manager*  
Questel



**Katherine Garnier**  
*Key Account Manager*  
Questel



# Agenda

→ Topics of today's discussion



Update on Questel

Different type of IP organizations and  
why change to a centralized model

Digitalization of annuities

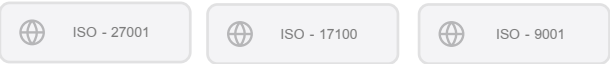
Digitalization of translations

# Who we are ?

→ **Questel is a global provider of tech-enabled professional solutions for managing all types of intellectual assets.**

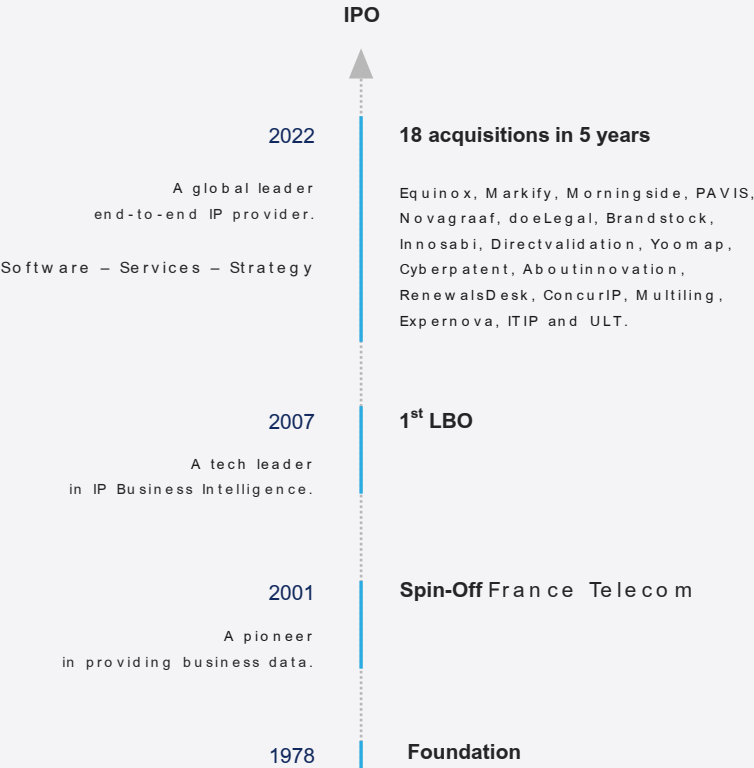
→ **Our mission is to help our client succeeding in the modern knowledge-based economy**, in an efficient, secure and sustainable way.

→ **We apply high standards** in quality, security and corporate social responsibility.



## Shareholders

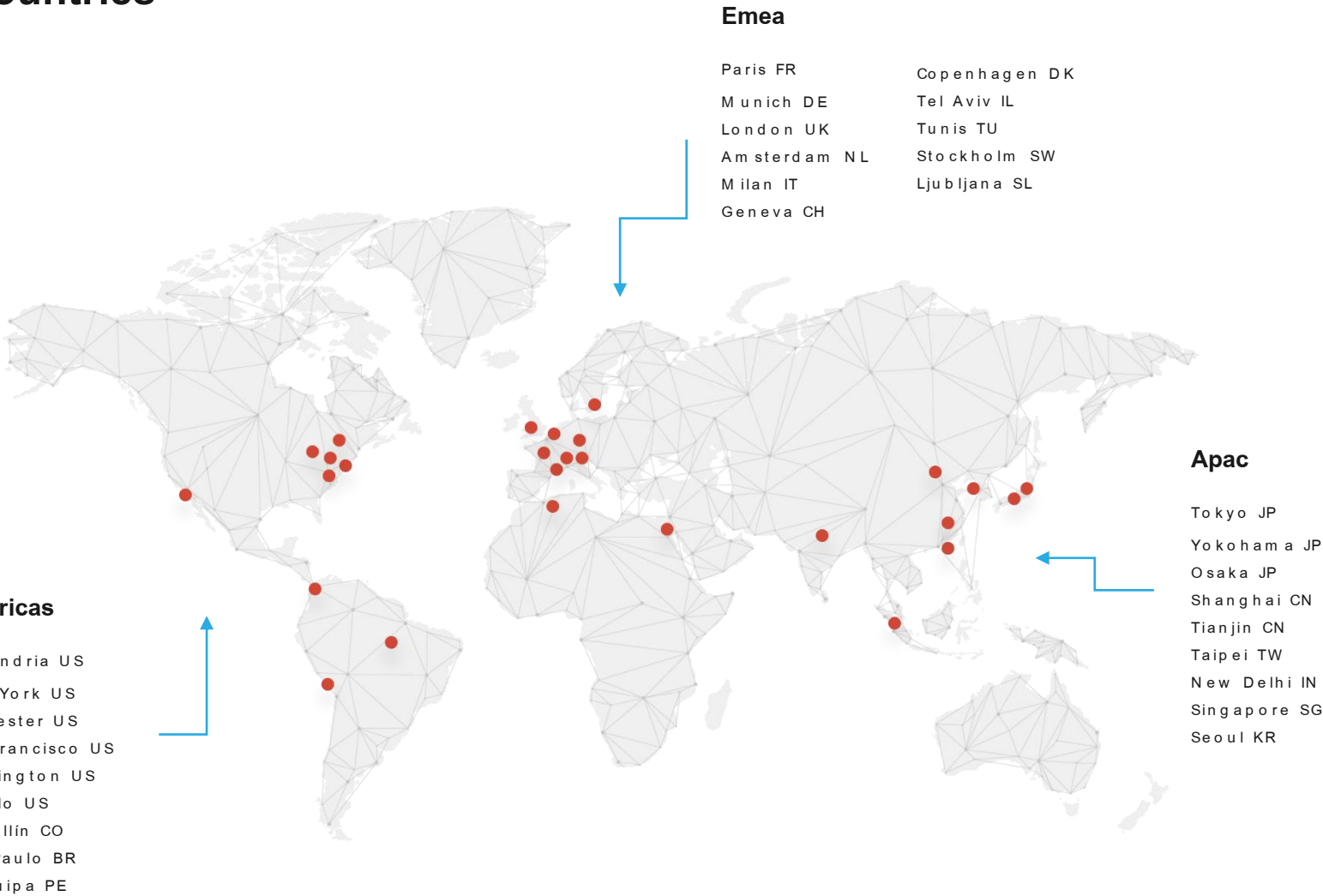
- CEO : Charles Besson
- 300+ employees are shareholders
- Private-equity backed Eurazeo, IK Partners, Paragon, Raise



# We serve 20,000 clients in 30 countries

## Key metrics

- 1,500 Questel employees
- 300+ local agents
- 1,200+ local translators
- 3 Questel Labs (AI & Big Data)
- 1.5 million users
- Petabytes of hosted data
- Daily update from 500+ sources



# Managing all types of Intellectual Assets



## Patents

Ensure competitive longevity by maximizing your patent assets.



## Trademarks

Targeted support throughout the entire trademark, design & domain name lifecycle.



## Ideas & Innovation

Connecting people, data & initiatives to innovate faster than ever.



## Trade secrets & Know-how

Blockchain technology proof of existence can be produced for any kind of asset.



## Contracts

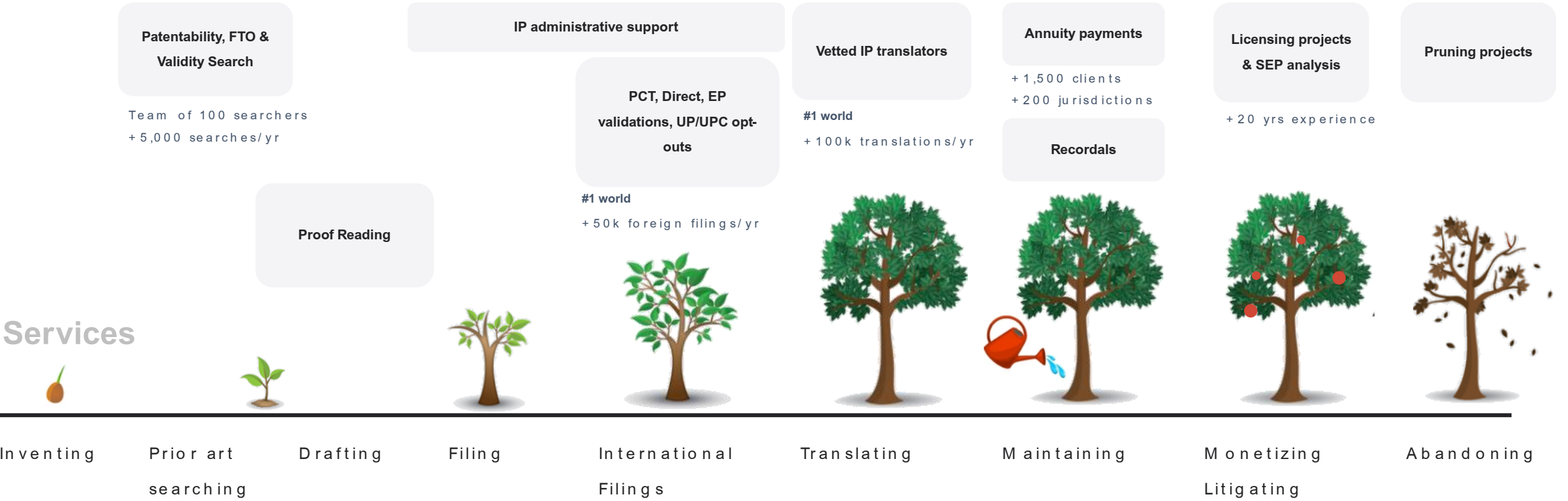
Contract lifecycle management, legal spend and matter management.



## Multilingual Content

Expert & certified translation, foreign language document review, or regulatory submissions.

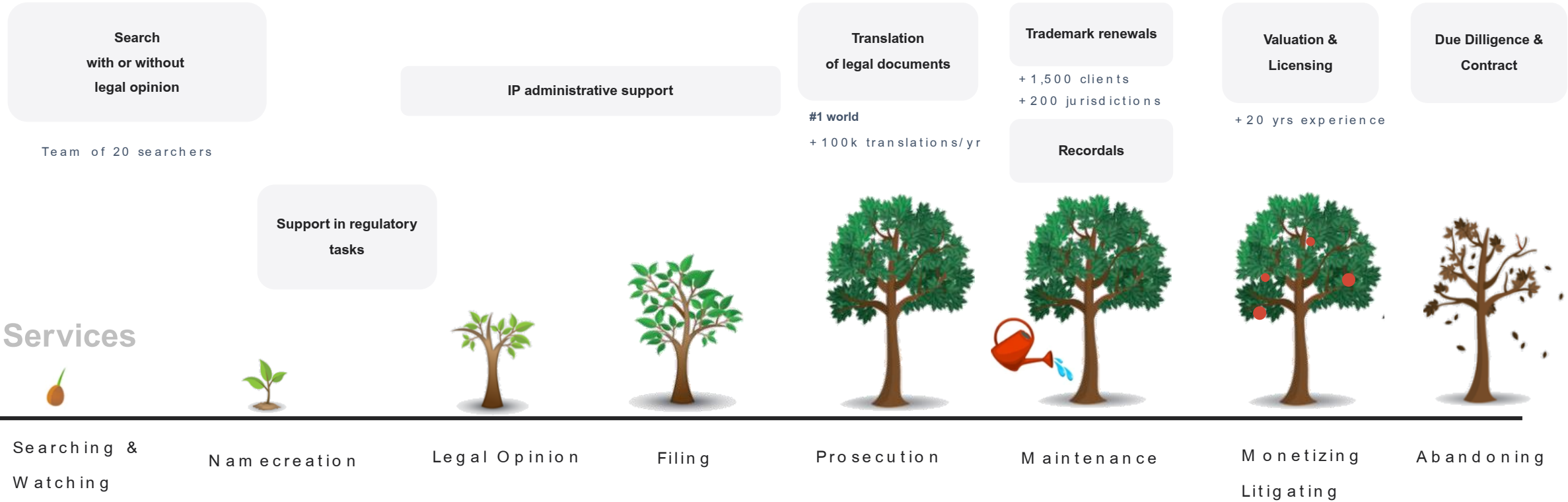
# Our offer - Patents



## Software



# Our offer - Trademarks



## Software



## Different types of IP organizations

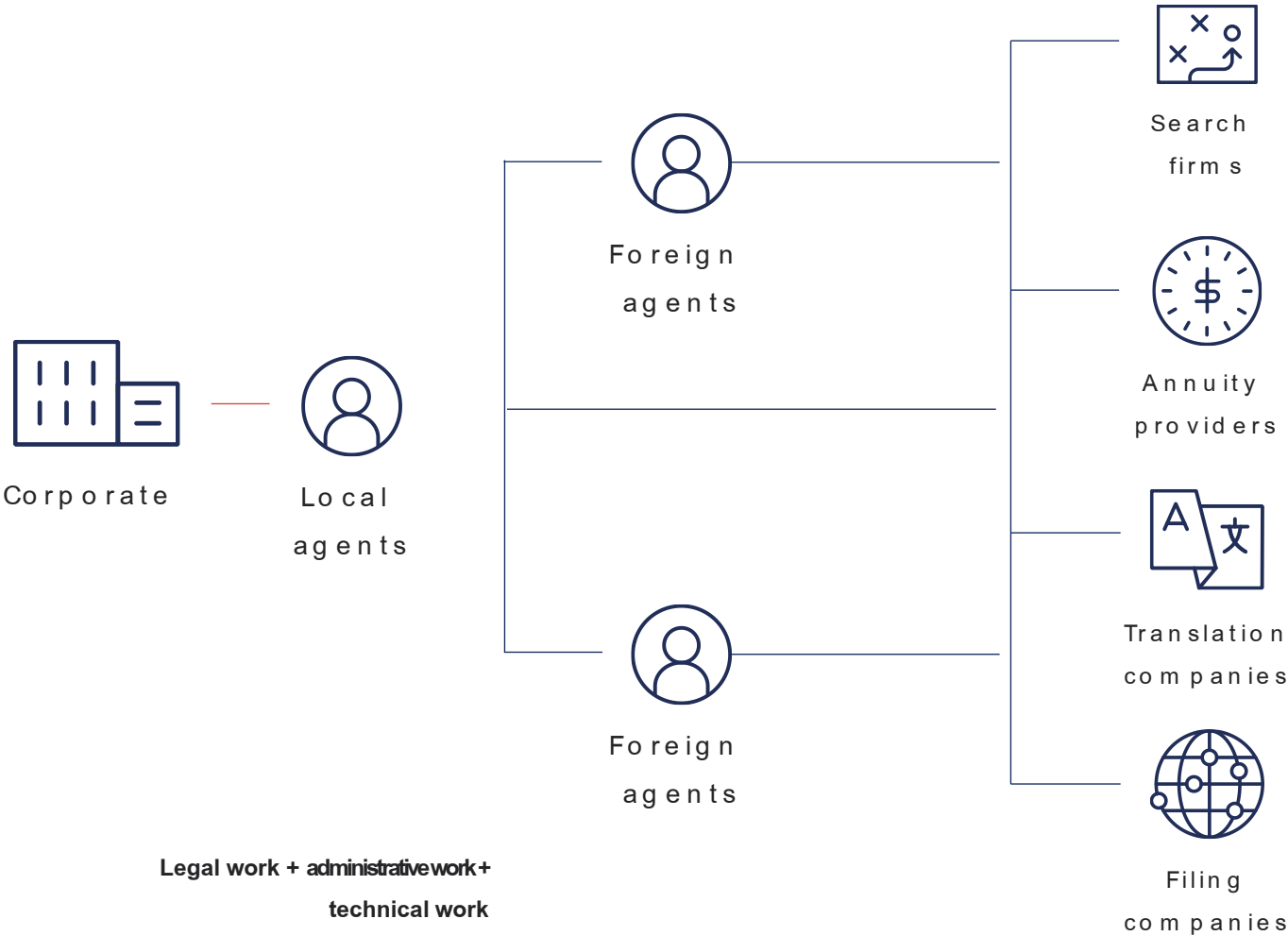
Challenges





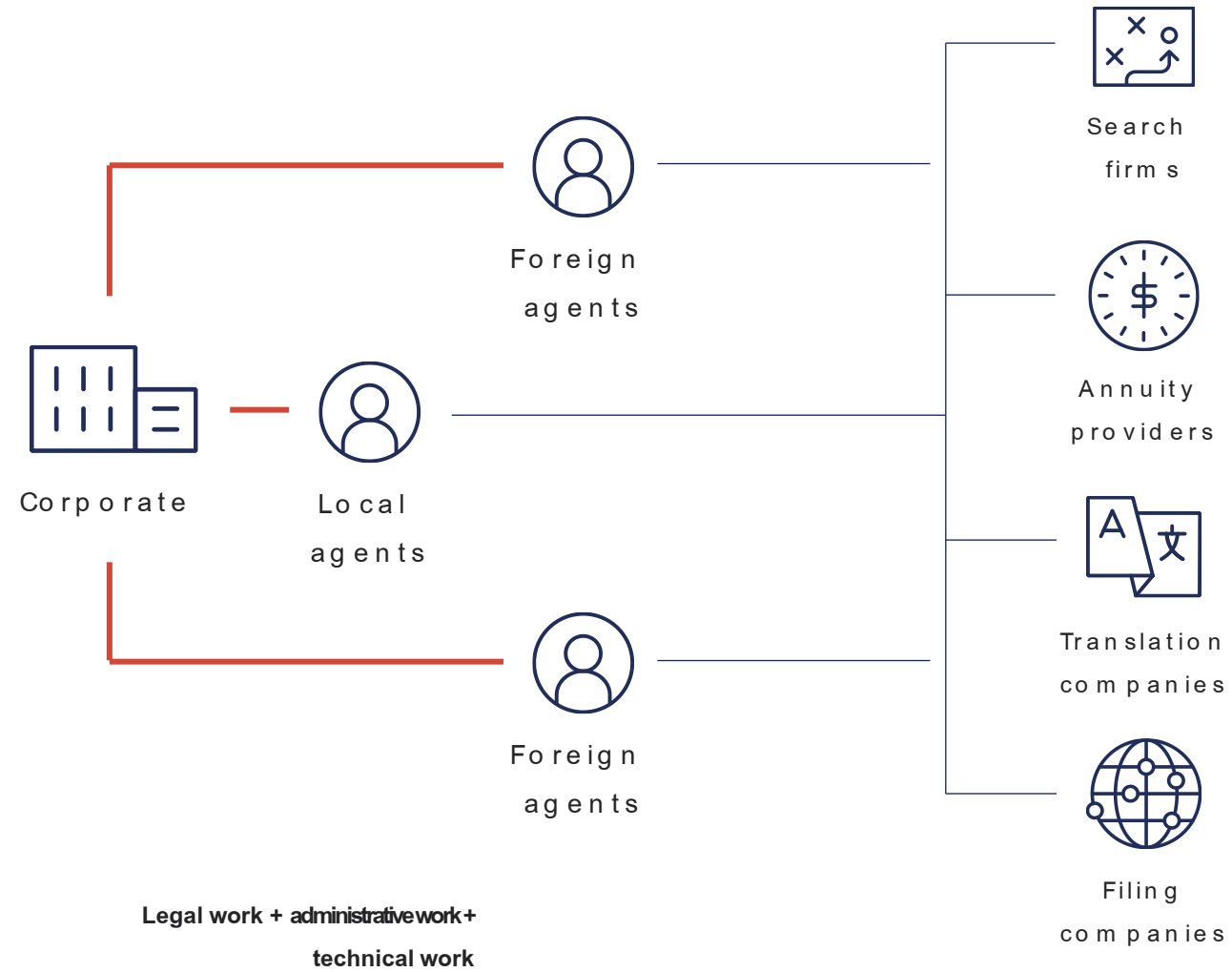
# Market trends

→ Coordinated model



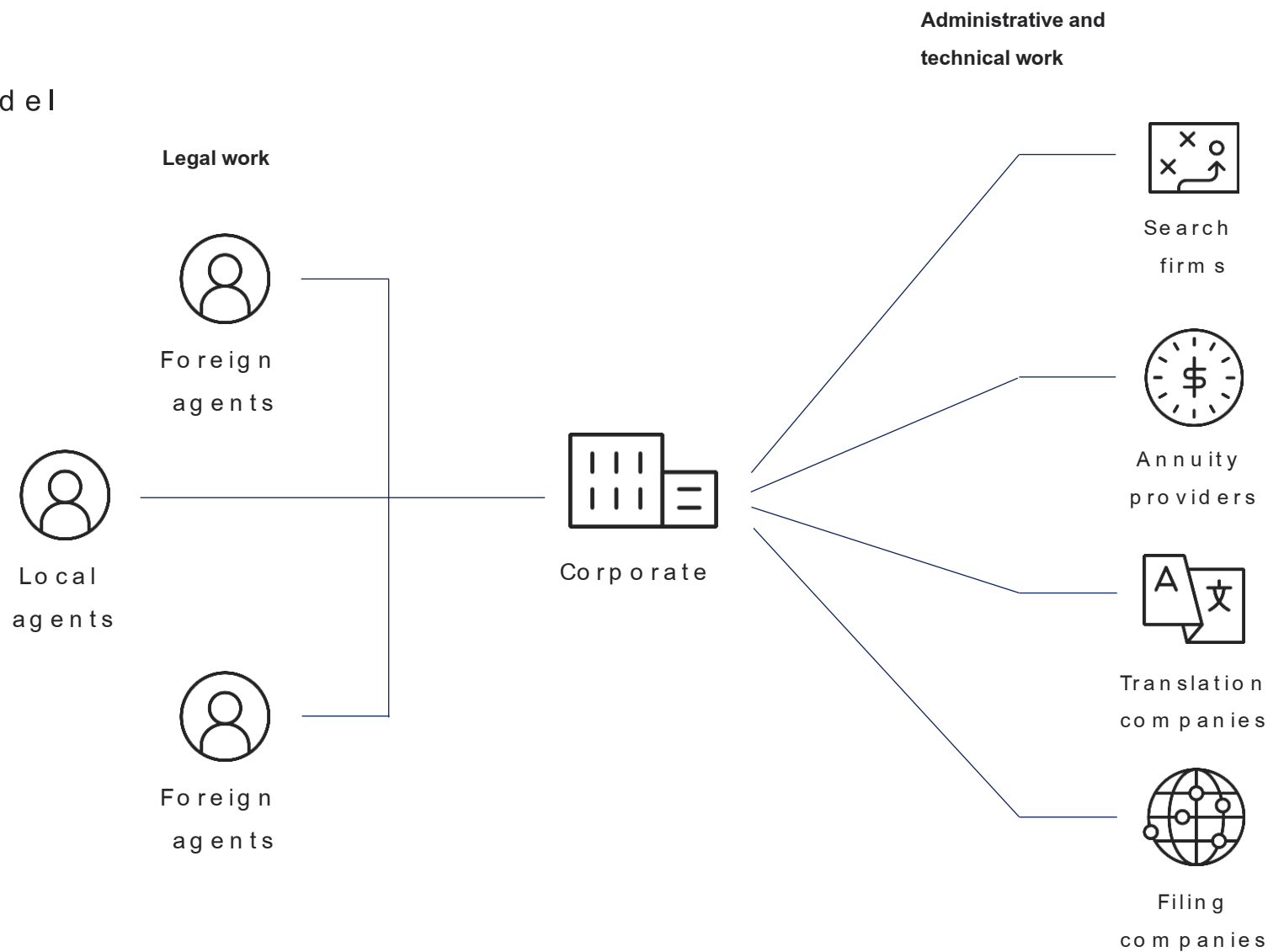
## Market trends

→ Evolution Coordinated model



# Market trends

→ Corporate model



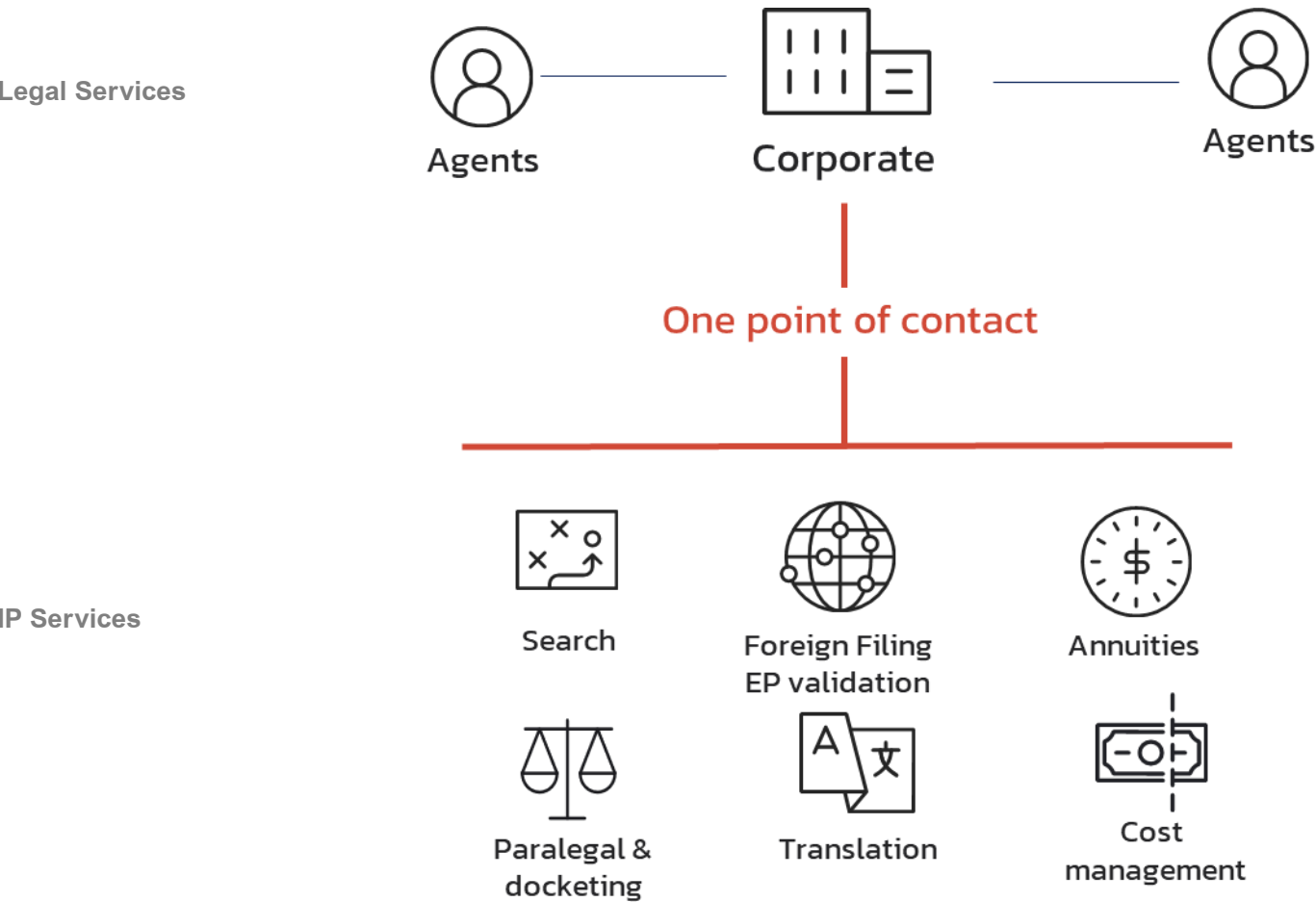
## Why change to the centralized model?

Impact of digitalization



# Centralized IP Services Model


→ Triggered by digitalization



## Benefits

Agents focus on added value legal advice

One IP service provider for cost-effective technical and administrative support



Content as a service API

# Streamlining IP operations and managing costs can be complex

→ The Challenges...

## Time & money

Internal pressures: top management & budget constraints

HR hiring-freeze

Performance & KPIs

High admin costs

Lean management = No time, no bandwidth

## Risk & Quality

Difficulty to keep and manage reliable network of agents

Impacts associated with poor translations (OAs)

## Operations efficiency

Large work volume for paralegal team (have need to simplify foreign filing)

Keeping docket up-to-date and meeting deadlines

## Transparency

Multiple and convoluted invoices

Balloon effect on costs even with a schedule of fees

## Consistency

No control on translation quality (no consistency from country to country)

...but also resistance to change

# Impact of technology and automation

→ The Digitalization as a key to centralization



## Reduce risk and improve quality

Tech enabled services, standardized and certified processes

## Global services web platform

A cloud-based secure portal to estimate, place, track and deliver all services  
Questel designs state of the art, secure services, including but not limited to infrastructure and networks.

## Increase productivity

One partner, one point of contact, one instruction, one invoice

Centralized workflow platform, integration with docketing and AI powered tools

## Drive consistency

Consistent terminology and process across languages and jurisdictions

Fewer agent queries and office actions  
Mitigate the risks of costly errors  
Less risk of litigation

## Gain transparency

IP spend and invoice analysis

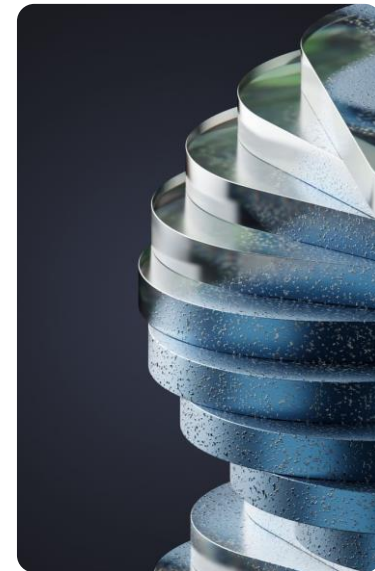
Quotes, orders, Status, Document transfer in and out available in Realtime

## Save costs

High volume negotiated rates

- Flat fee pricing model
- Consolidated invoicing
  - Detailed invoices
  - No hidden costs
- Free cost management
- No software subscription

## Digitalization of Annuities





## Renewal management in the last century

...sometimes still today

- A lot of manual work
- Time consuming
- Big risk of errors
- Complicated
- Little control
- Expensive



## Renewal management in 2023

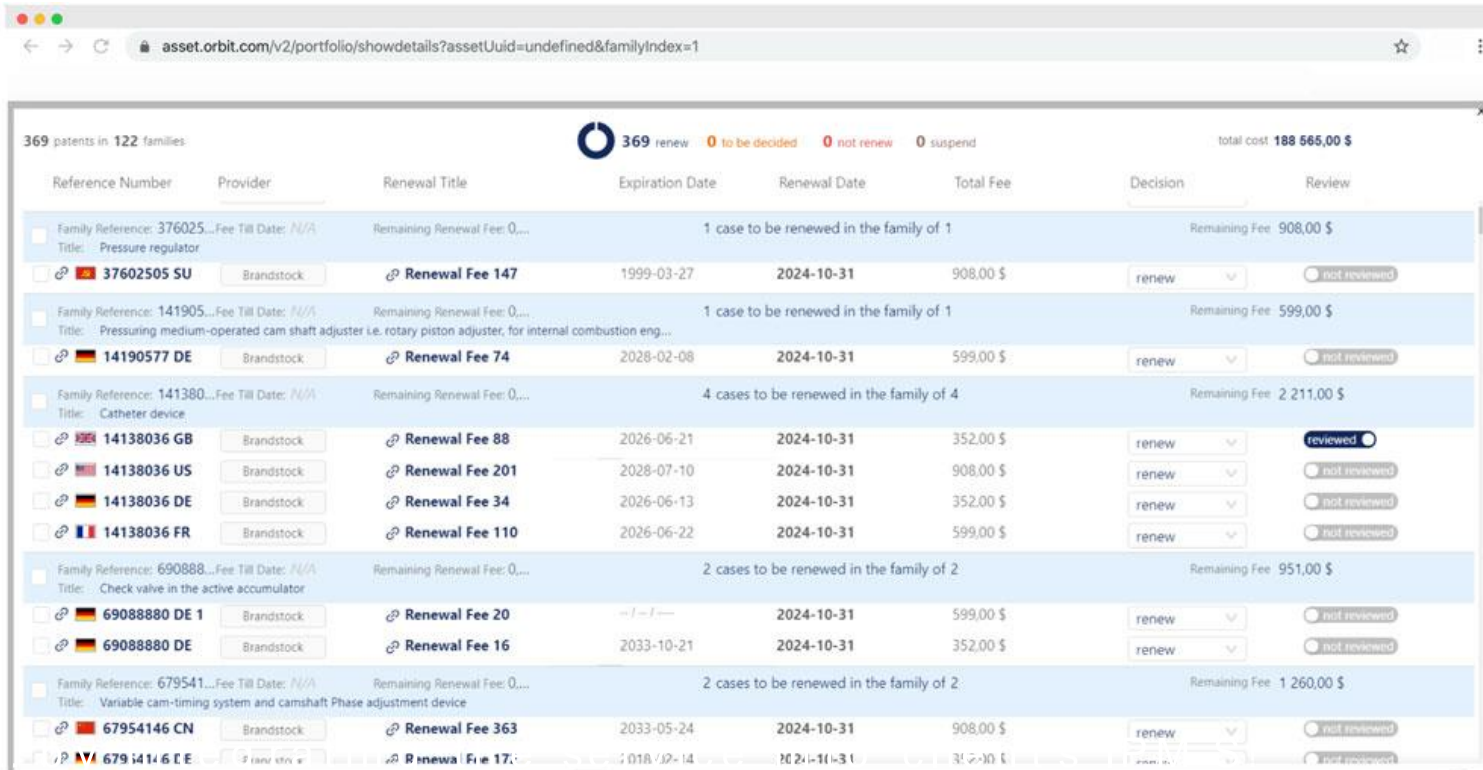
(Still) Unnecessary efforts, costs ...

Spending too much time, resources and costs on administrative work does not add value to the company



Media Discontinuity

... but there is a clear trend towards automation ...



369 patents in 122 families

369 renew 0 to be decided 0 not renew 0 suspend total cost 188 565,00 \$

| Reference Number   | Provider   | Renewal Title   | Expiration Date | Renewal Date | Total Fee | Decision | Review       |
|--|------------|-----------------|-----------------|--------------|-----------|----------|--------------|
| Family Reference: 376025...Fee Till Date: N/A Remaining Renewal Fee: 0... 1 case to be renewed in the family of 1 Remaining Fee 908,00 \$    |            |                 |                 |              |           |          |              |
| 37602505 SU  | Brandstock | Renewal Fee 147 | 1999-03-27      | 2024-10-31   | 908,00 \$ | renew    | not reviewed |
| Family Reference: 141905...Fee Till Date: N/A Remaining Renewal Fee: 0... 1 case to be renewed in the family of 1 Remaining Fee 599,00 \$    |            |                 |                 |              |           |          |              |
| 14190577 DE  | Brandstock | Renewal Fee 74  | 2028-02-08      | 2024-10-31   | 599,00 \$ | renew    | not reviewed |
| Family Reference: 141380...Fee Till Date: N/A Remaining Renewal Fee: 0... 4 cases to be renewed in the family of 4 Remaining Fee 2 211,00 \$ |            |                 |                 |              |           |          |              |
| 14138036 GB  | Brandstock | Renewal Fee 88  | 2026-06-21      | 2024-10-31   | 352,00 \$ | renew    | reviewed     |
| 14138036 US  | Brandstock | Renewal Fee 201 | 2028-07-10      | 2024-10-31   | 908,00 \$ | renew    | not reviewed |
| 14138036 DE  | Brandstock | Renewal Fee 34  | 2026-06-13      | 2024-10-31   | 352,00 \$ | renew    | not reviewed |
| 14138036 FR  | Brandstock | Renewal Fee 110 | 2026-06-22      | 2024-10-31   | 599,00 \$ | renew    | not reviewed |
| Family Reference: 690888...Fee Till Date: N/A Remaining Renewal Fee: 0... 2 cases to be renewed in the family of 2 Remaining Fee 951,00 \$   |            |                 |                 |              |           |          |              |
| 69088880 DE 1  | Brandstock | Renewal Fee 20  | ---             | 2024-10-31   | 599,00 \$ | renew    | not reviewed |
| 69088880 DE  | Brandstock | Renewal Fee 16  | 2033-10-21      | 2024-10-31   | 352,00 \$ | renew    | not reviewed |
| Family Reference: 679541...Fee Till Date: N/A Remaining Renewal Fee: 0... 2 cases to be renewed in the family of 2 Remaining Fee 1 260,00 \$ |            |                 |                 |              |           |          |              |
| 67954146 CN  | Brandstock | Renewal Fee 363 | 2033-05-24      | 2024-10-31   | 908,00 \$ | renew    | not reviewed |
| 67954146 DE  | Brandstock | Renewal Fee 17  | 2033-05-24      | 2024-10-31   | 352,00 \$ | renew    | not reviewed |

→ Highly specialized service

→ Easy to use

→ Highly automated

→ Highly efficient

→ Highest reliability

→ Much cheaper

# Digitalization

Manually

Partly digital

Fully digital



No IPM S in use:  
Sending back and forth letters for annuity instructions, confirm ations, receipts, etc.



Maybe IPM S in use:  
Sending back and forth emails, letters & faxes



IPM S in use:  
Sending back and forth emails with attachments, updating IPM S manually



IPM S in use:  
Sending export files, receiving import files to update IPM S manually or electronically



IPM S in use – synchronized with Annuity payment system :  
Bi-directional in real-time ➔ **Digitization achieved!**



Client example:  
Reduction of workload from 1-2 days / month to 2 hours / month

# User Case



Modernising IP operations with  
the implementation of new IP  
Renewal Services.



## Company

International automotive braking supplier



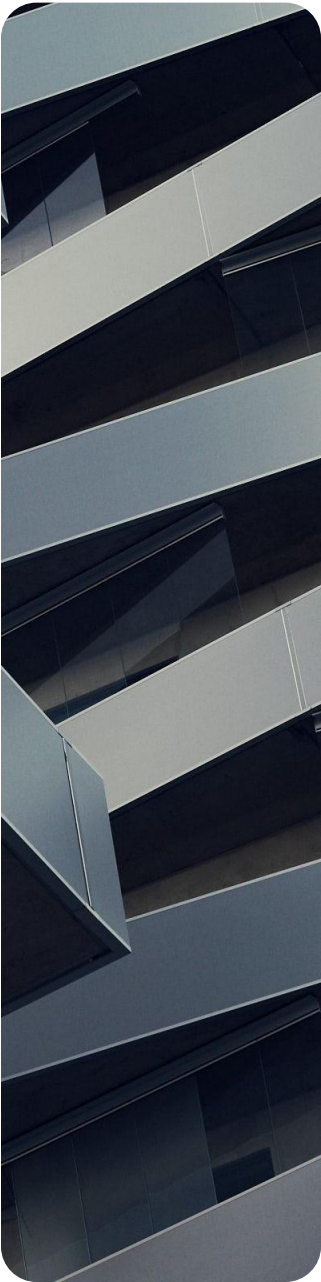
## Portfolio size

~ 3,500 alive patent families



## Objectives

Reduce administrative workload and  
improve data quality

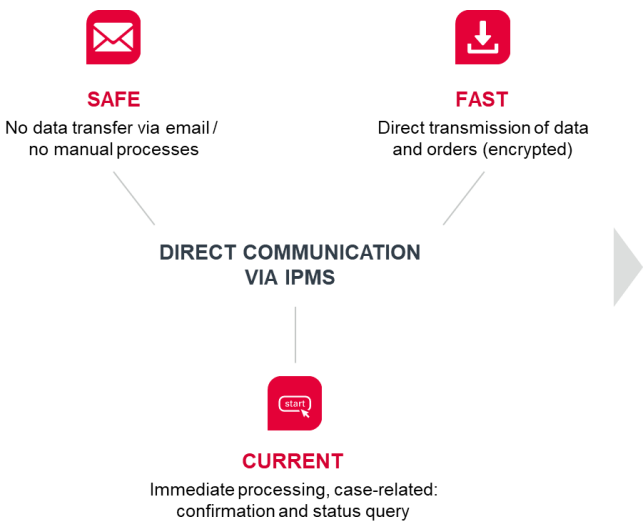


# Client Setup

## What digitalization offers

**Solution:** Fully automated real-time communication between their IPMS (EIDOPAT) and Pavis/Questel payment service.

- **Secure** (encrypted) data exchange
- **Fast:** direct transmission of data
- **Time saver:** no more manual steps such sending data or receipts by email, manual logging of invoices
- **Real-time information:** thanks to synchronised databases, immediate processing, feedback and status updates



# Client Feedback

→ Servicing specific requirements

→ Flexibility through **tailor-made invoice** formats and monthly invoicing

→ **Elimination of time-consuming** process steps

→ **Flexibility** through extremely short cancellation periods

→ Problem-free introduction of Pavis Connect and PAVIS contacts always available by phone

→ Benefit from an easy and click away reporting and budget forecast








→ **Encrypted data** exchange

→ A **trusted partner** with change management



# State-of-the-art interface solution

## PAVIS Connect Modules

| IMPORT  | PREVIEW   | BUDGET  | HISTORY   | RECEIPT  | STATUS  | CANCELLATION  |
|---|---|---|---|--|---|---|
|  |  |    |  |   |  |  |
| Transmission of new and amended cases, including individual orders and deletions  | Provides information on due dates, type of IP right, payment year, costs          | Provides overview of due dates and renewal costs until expiry, including surcharges | Gives information on the status of all previous payment orders for a single case  | Users can request an extract of collective official receipts; for single case receipts a direct query is made via the history module | Provides most recent status information about a case saved in the PAVIS database    | Allows cancellation of a pending payment order                                      |

*Real time bi-directional communication between PAVIS and client's IPMS*  
**Communication, Feedbacks, Confirmation**  
*without user intervention!*

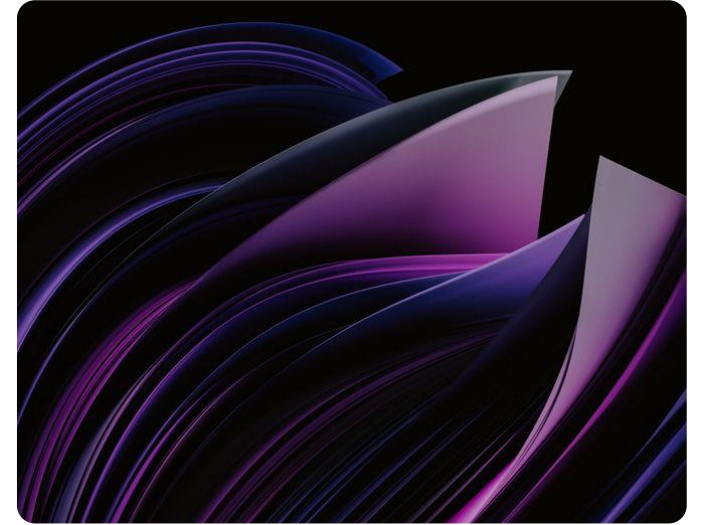
### Benefits

#### Transparency and Efficiency

- Many API partners
- Well-proofed and easy to establish
- Complete data integrity
- Only one communication channel / no media discontinuity
- Simplification in administration and invoicing



## Digitalization of Translations





# Client data exchange

→ From e-mail to a fully automated process



eMail

IPMS  
Partner Portal

Service Portal

API

| Security | Robustness/<br>error risk | Workload<br>client | Workload<br>Service provider | Transparency/<br>control |
|----------|---------------------------|--------------------|------------------------------|--------------------------|
| ✗        | ✗                         | ✗                  | ✗                            | ✗                        |
| ✓        | 👉                         | ✓                  | ✗                            | ✗                        |
| ✓        | 👉                         | ✗                  | ✓                            | ✓                        |
| ✓        | ✓                         | ✓                  | ✓                            | ✓                        |

# User Case



**Simplifying Foreign Filing** using  
Questel new **IP Services Portal**  
whilst benefiting from a  
comprehensive **Cost Reduction**  
**solution.**



## Company

International automotive supplier



## Portfolio size

~ 2,000 alive patent families

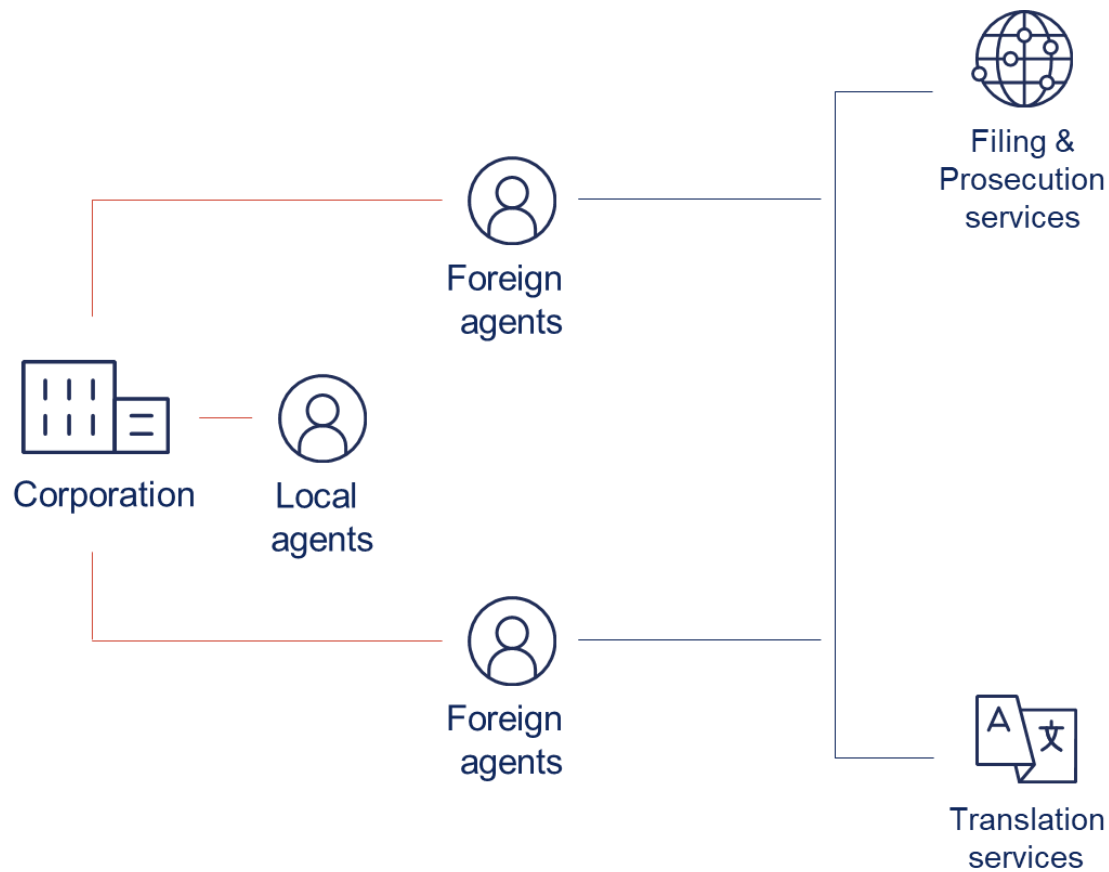


## Objectives

Making a significant impact on efficiency  
and cost savings of IP operations



# Client “old” setup



**Priority application** filing through local agents

**PCT filing** through local agents (or partly inhouse)

**National and Regional filing** and prosecution (US, EP, BR, KR, JP, CN....) through foreign agent network, managed directly by in-house IP team

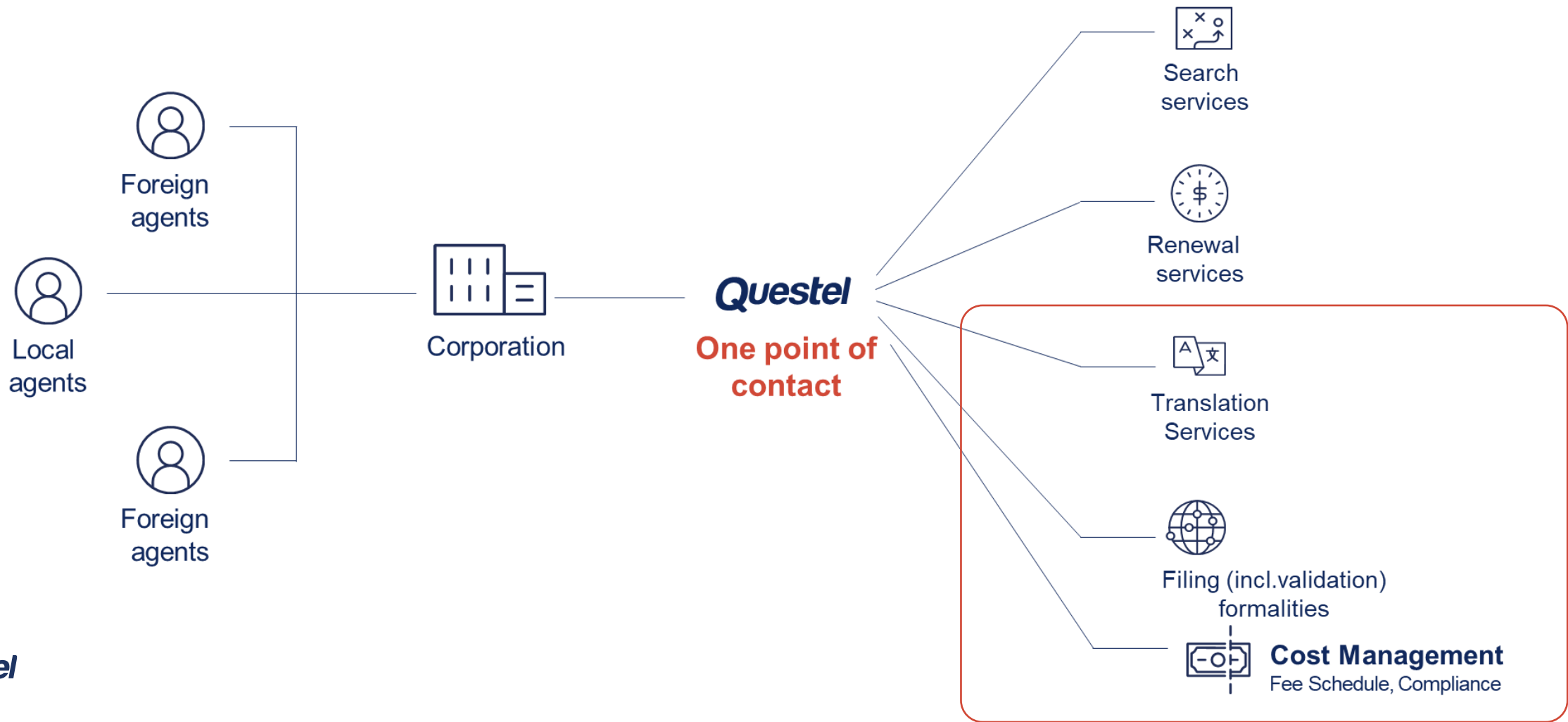
# Client “new” setup

## Legal work

Agents focus on added value legal advice:  
Drafting, PCT & national prosecution

## Administrative and technical work

Questel provides cost-effective technical and administrative support



# Client Feedback

## ON INTERNATIONAL FILING

→ Translation quality maintained at the same level

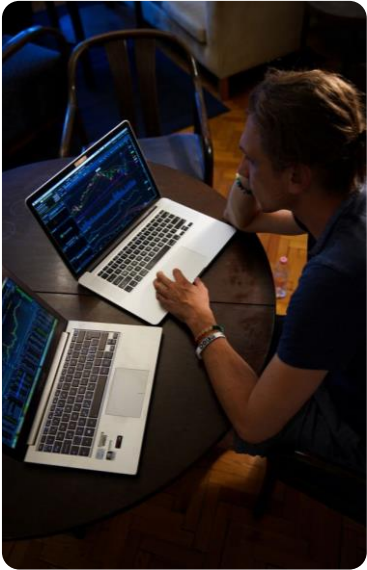
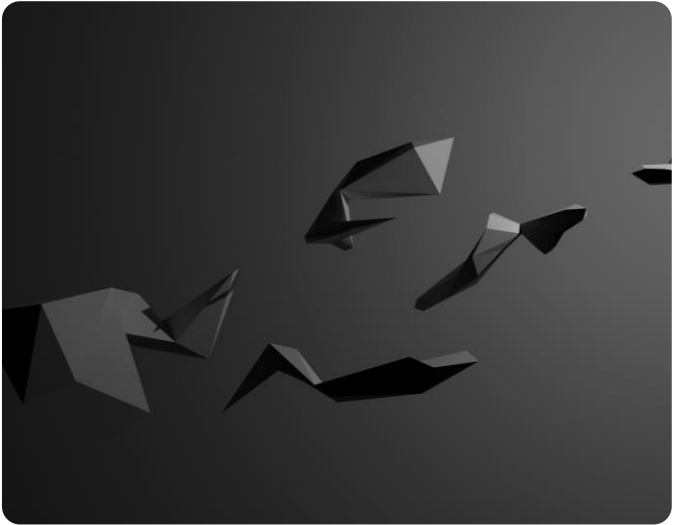
→ Introduction phase of new process was fairly smooth; no big effort in explaining to foreign agent network

→ **Process works very well**

→ **Generate cost savings of around 20% (compared to old process for foreign filings)**

→ Continue to rely on agent network experience for prosecution work

→ Ease for paralegal team to have single contact point for translations and filing instructions



# Client Feedback

## ON COST MANAGEMENT

→ Invoice information of agent network sent to Questel on monthly basis

→ Monthly invoice reports meetings with Questel

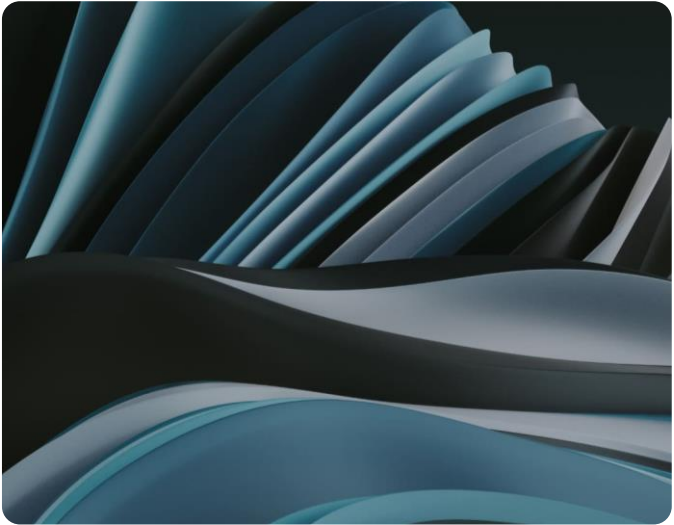
→ Possibility to get custom reports from Questel

→ Easy to let Questel introduce the fee schedule (no big effort in negotiating for client)

→ All agent accepted and signed (same) global Fee Schedule (no negative impact on relationship)


→ Communication about Fee Schedule violations can be configured as needed (included in monthly report meetings)

→ No extra costs for this Cost Management service



# Questel solution

→ Services Portal



PCT National Estimate

Valid Through December 05, 2020

ESTIMATE

\$ 6,000 USD

Test Client

Reference: TEST-EST-98HG01

INTL. APPLICATION NUMBER

PCT/IB2019/012345

Jurisdictions: 2

Word count: 10,000

Total number of pages: 100

| JURISDICTION     | SERVICE CHARGES | OFFICIAL FEES | TRANSLATION | TOTAL        |
|------------------|-----------------|---------------|-------------|--------------|
| China (Chinese)  | \$ 500          | \$ 500        | \$ 1,000    | \$ 2,000 USD |
| Japan (Japanese) | \$ 1,000        | \$ 1,000      | \$ 2,000    | \$ 4,000 USD |

Disclaimer:

The costs are estimated and may differ from the invoices once exchange rates, final official and service fees, final word count, final number of claims, pages, sequence listing tables and formulas, expedited examination and other nonstandard factors are considered.



## Estimate

Budgeting for transparency and predictability



## Order

Centralized ordering stream lines process



## Monitor

Case status updates reduce risk and improve visibility



## Manage

Projects page for access to filing information and documents

# Cost management Questel Solution

→ A comprehensive cost optimization programme



Savings on Filing, EPV & Translations



Cost Management



20 to 30% Saving on external IP spend\*

\*Official fees excluded

01

## Invoice audit – Team of Patent Attorneys

Identifying all potential savings across the IP lifecycle – focus on primarily administrative charges

02

## Fee Schedule Setup & Negotiation

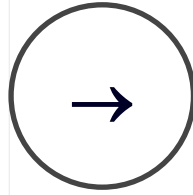
A Phase-based fee schedule designed and implemented for you based on our +16 years expertise

03

## Compliance review & Benchmark Reports

Ensuring the negotiated fees are being implemented continuously and consistently & providing detailed insights into agents' charges





# What's next

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**Elimination of media discontinuity...**  
**for the whole IP administration**

To find out how/if we could also help you & your organisation to improve IP processes and achieve significant cost savings, please contact Nathalie or Katherine :

[nmantrand@questel.com](mailto:nmantrand@questel.com)

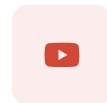
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