

# Transform Your Business for Success with **Beyond IP Strategy**



Intellectual Property  
assets are  
complicated



Intangible assets account  
for up to 90% of many  
companies' total assets



Wise investment in an IP  
strategy is essential to  
business success

Applying a **business consulting approach to IP issues**, we combine **design thinking** principles with **IP data and analytics** to build your strategy.

Beyond IP Strategy helps companies navigate and leverage IP by providing *value-driven, proactive* programs that are *co-created* to reduce business risk and support strategic growth, while increasing cost certainty and peace of mind.

## Value-driven

Based on how your company defines value, we help to develop and execute a plan and a budget for IP investment that supports and drives business success and reduces manageable business risk.

## Proactive

We help you build a framework and culture that ensures your regular and intentional IP investments support current and future growth areas and remain strategic, and increases cost certainty.

## Co-created

Our experts work together with you to co-create an IP strategy that aligns with your success metrics to produce value, confidence in decision making, and peace of mind.



Protect and grow  
your market position



Focus on the IP projects  
that matter most



Access business-minded  
legal expertise



Make IP decisions more quickly  
and confidently



Improve your portfolio's  
cost efficiency



Translate insights into a  
competitive edge

# Beyond IP Strategy

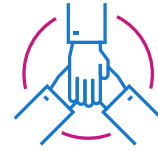
## What can IP do for my business?



Create a competitive advantage



Achieve business goals using a portfolio of intangible assets



Build a collaborative culture that maximizes ROI for IP investment

## Our Service Offerings

- Beyond IP Strategy provides a **suite of integrated services** and access to a team of experts, **without having to build or expand an in-house IP function.**
- Our programs and services:
  - Are and **designed in levels** to **fit the needs** of companies at **different stages** of IP and company maturity.
  - Are offered with a **fixed fee**, and include specific offerings as well as a bank of additional hours of IP strategy services.
  - Offer **expert strategic business-focused advice**, and **co-development** of an IP strategy, with regular review of implementation.
  - Address **IP awareness** and **culture-building**, and some of our programs include IP competitive intelligence reports, as well as access to self-serve resources.
  - Provide participating companies with **ongoing access to extra content** for Beyond IP Strategy alumni.

### Strategy Programs

- Growth Catalyst® programs
- Branding Review & Strategy
- Trade Secret Protection
- Tools for IP Management

### Education & Awareness

- IP Awareness and Training
- IP Culture Building
- Innovation Incentives and Programs
- Strategy Execution Training

### Pre- and Post-Deal Work

- Financing
- Acquisition
- Post-Acquisition Integration
- Exit

### IP Data & Analytics

- Competitive Research
- Landscape Reporting
- Clearance SWOT Analysis
- Portfolio Analysis and Forecasting

### Bespoke Advisory

- Advanced IP Strategy Issues
- Innovation Program Development
- Operational Excellence

## Case Study

### Beyond IP Strategy in action

#### Client Challenge

A successful healthcare software design client came to us with a new invention to protect, and a desire to build an IP strategy.

#### Our Approach

Using our *Growth Catalyst*® IP strategy program, the client received thoughtful strategic advice and guidance, and a roadmap for implementing and executing the strategy and keeping it relevant while optimizing legal spend.

#### Client Results

The client avoided a planned IP investment that would not have provided business value, and came away with a holistic IP strategy, including recommendations in terms of trade secrets, agreements and patent protection.

## Representative Work

Advised a manufacturing and design company on IP strategy prioritization for different R&D investments, including providing Board-level guidance and developing a detailed implementation blueprint.

Advised an investment fund focused on innovative companies, developing a playbook and framework for assessing company IP maturity and negotiating IP clauses in funding agreements.

Worked with a multinational professional services firm to provide Board-level assessment of intellectual property strategy and review of an existing patent portfolio for an optical semiconductor designer and manufacturer.

Assisted a number of public research organizations in Canada on elements of their IP strategy and policy, including training, technology-related and license agreements, patent valuation and commercialization, and patent enforcement.

Advised a post-secondary institution on strategic assessment of two patent portfolios (hydrogen technology and big data), including patent asset assessment and portfolio metrics, market assessment, and commercialization options.

Advised a global infrastructure organization with its innovation program for technology related to construction optimization software, including license agreements and arrangements with Canadian and U.S. universities.

# Beyond IP Strategy Team



## **Curtis Behmann**

Partner & National Leader,  
Beyond IP Strategy

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Curtis, one of the top IP strategists in the world according to the IAM Strategy 300, is a professional engineer, registered patent agent and design expert. His more than 20 years' experience brings a unique combination of deep expertise and board-level strategic insights to startups, scale-ups and world-leading multinationals.



## **Jason Howg**

National Business Leader,  
Intellectual Property

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Jason advises Canadian and international businesses on a broad range of technology and intellectual property matters, including large-scale and mission critical information technology (IT) transactions, technology and IP license agreements, intellectual property protection and strategy. He focuses on the IT and high tech, health informatics, medtech, energy, artificial intelligence, internet of things and online retail (ecommerce) sectors.



## **Beverley Moore**

Partner,  
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IP Litigation

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Beverley is a trial lawyer and advises clients on patent portfolio management, including how to navigate pharmaceutical and biotechnology IP Regulatory issues such as listing patents on the Patent Register, and reporting patents to the Patented Medicines Prices Review Board, Certificates of Supplementary Protection, and the Register of Innovative Drugs as it relates to data protection.



## **Geoffrey de Kleine**

Partner

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Geoff has over 20 years of practice in patent drafting and prosecution, and industrial design protection and is recognized as one of the world's leading patent practitioners in IAM Patent 1000. He specializes in the mechanical, materials and metallurgical, and electrical fields, in industries such as medical devices, oil and gas, water treatment, consumer products, semiconductor packaging, and heat exchange technologies.



## **Geneviève Bergeron**

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Geneviève specializes in intellectual property, commercial law and intellectual property transactions. Her practice is focused on trademarks, copyrights, trade secrets, domain names, licensing, technology transfer, and agreements involving IP rights. She counsels clients on the IP and IT aspects of transactions, including financing, mergers and acquisitions and joint ventures.



## **Brandon Evenson**

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Brandon Evenson is a Patent and Trademark Agent, and Lawyer who builds and executes strategies for clients to enforce, acquire, and monetize international IP portfolios, with a focus on high tech patents. He specializes in advising executives on complex IP-focused transactions and commercial matters, and is internationally ranked by IAM Patent 1000 and Chambers Canada as a leading Canadian patent expert.



## **Natasha Gulati**

Associate

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Natasha is a lawyer with a background in organic chemistry and business administration who provides her clients with a unique combination of business and legal insights. Natasha helps innovators implement IP protection measures (including patents and copyright), litigate IP, and navigate the commercial factors that drive innovation, particularly in the life sciences and IT sectors.

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