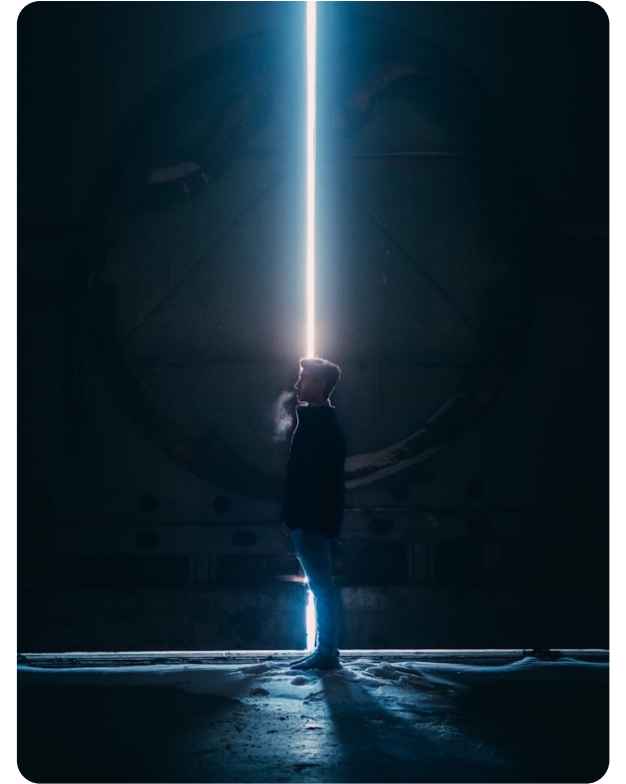


*Questel*

# Three Critical Trends in IP Management Technology

Discover the key trends and technologies that will impact the IP management landscape this year—and how the right system can enable your organization to thrive.



# The IP Management Landscape Today

**Every profession benefits from the lightning-fast pace of technological development, and IP management is no different.**

Technology has already had a far-reaching impact on the IP profession, with the paper-based deadline management processes of old now replaced by increasingly sophisticated web-based IP management systems (IPMS). While early systems focused predominantly on docketing and deadline management, today's IP management platforms have matured into services that make it easier for IP professionals to manage the complete IP lifecycle—and there is more to come.

In this eBook, we discuss three key trends that we expect to shape IP management technology and how you can prepare your organization to capitalize on these new capabilities, including:

- Trend 1: The Drive to Integrate Data, Systems, and Processes;
- Trend 2: The Push to Centralize and Integrate IP Services;
- Trend 3: The Practical Implications of Artificial Intelligence; plus
- Why the Future of IP Management Technology Is Closer than You Think; and
- How to Get Your Organization Ready to Harness Technology's Potential.

**If you have any questions about the topics discussed in this eBook, including why and how to upgrade to our Equinox IP management software, please [contact our subject matter experts](#).**





# The Drive to Integrate Data, Systems, and Processes

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Existing IP management tools have made it faster and simpler for corporations and law firms to manage IP data and processes; more system integration will increase efficiency, insight, and control.



## Trend 1: System and Data Integration

**While task and deadline management remain at the core of IP management systems, in-house IP departments and law firms need more sophisticated systems to deliver efficient processes, data-driven insights, and complete oversight and control.**

System interoperability with wider business productivity tools, such as accounting software, document management, and email, is already becoming a minimum requirement for today's IPMS users. A similar picture applies to data-sharing between IP systems, IP service providers, and the IP registries of global patent and trademark offices.

The best IP management systems of the future will see all data, documents, and correspondence accessible from a single location. No longer will you have to switch between different tabs and programs or manually upload data from one place to the next; instead, the databases will communicate automatically, saving everyone in your team time and freeing up your internal resources to focus on delivering higher-value work.

Industry-specific data sharing and validation tools and powerful API-based integrations are already paving the way for IP professionals to manage and oversee the entire IP lifecycle through a single login. Meanwhile, interoperability with related business tools—from emails to document management—is enabling IP professionals to oversee IP portfolio administration processes more effectively, too.

### **From data sharing to full API integration**

These integrations are increasingly accessible on IPMS platforms today and combine many of the tech services you already rely on, from software as common as Microsoft Office to email and deadline and document management tools. The benefits of integration extend beyond those working on cases, however. Financial services applications can also be





connected to your system to make it easier to manage and automate billing, consolidate invoices, and improve budgeting and cost forecasting.

### **Further integration is on the horizon**

This year, we expect to see a range of products and services leverage further system integration. Enabling more to be done on fewer platforms will not only allow users to spend less time switching between programs, but also help to further automate data management to improve accuracy and reduce overall administrative time.

As a provider that's in regular technical talks with many patent and trademark offices and other data-centric businesses in the industry, we are at the forefront of this development. Our future-proof IP management software—[Equinox Corporate](#), [Equinox Corporate+](#), [Equinox Law Firm](#), and [Equinox Law](#)

[Firm+](#)—already has integrations to help users process their cases across multiple platforms.

These include purpose-built Microsoft Office, Outlook, and Gmail integrations to allow automated document templates and correspondence to be prepared as and when users need them. For finance management, the software is linked to providers such as Xero and Sage, making accounting, invoicing, and international payments simpler to manage.

For data validation, our technology accesses case data directly from official patent and trademark offices, making it much easier for IP professionals to keep their portfolios up to date. Finally, as a member of the European Patent Office [API pilot scheme group for MyEPO Portfolio](#), we are also helping develop an integration system that will vastly benefit IP professionals in years to come.



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# The Push to Centralize and Integrate Services

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IP professionals in corporations and law firms are looking to their IPMS providers to deliver access to all their services in one convenient location.



## Trend 2: Service and Software Integration

**From managing official Office updates to translations, searches, watches, and renewals, managing an IP portfolio relies upon a vast range of services. Today's IP professionals increasingly expect to be able to handle everything related to their IP portfolios in one place.**

Given the hundreds of services that exist to help with individual elements of the profession, enabling users to manage all these tasks from a single IPMS will bring massive efficiency gains and drastically simplify the often-complicated task of protecting IP assets. Thanks to wider advances in technology, we have already found smarter ways to bring these capabilities and services together into a “one-stop-shop,” and you can expect to see more of this in the next few years.

### **Building a one-stop-shop for IP services**

For example, our [Equinox IP management software](#) already enables users to manage a wide range of data and services. But there is more in the pipeline. Since acquiring Equinox in 2022, Questel has been busy integrating our wide range of patent, trademark,

design, copyright, and domain name services into the IP management technology to deliver unparalleled efficiency benefits for clients.

Thanks to direct links with Questel's (PAVIS Connect) [patent renewals](#) and (Markify) trademark and design [clearance & watch platform](#), customers can now manage integral elements of their IP portfolio through their chosen Equinox IP management software. [Patent translation](#), [EP validation](#), and [trademark, design, and domain name services](#) are just some other integrations in the pipeline for further development this year.

We believe service integration is the next big milestone for providers of IP management technology. By enabling IP professionals to access their services through their chosen IPMS, they will be able to order, ➡

track, and administer their IP portfolio from one single place, thereby centralizing and consolidating IP data and service delivery and simplifying and streamlining IP management.

**A tipping point for integrated service delivery**

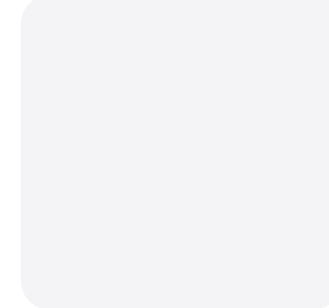
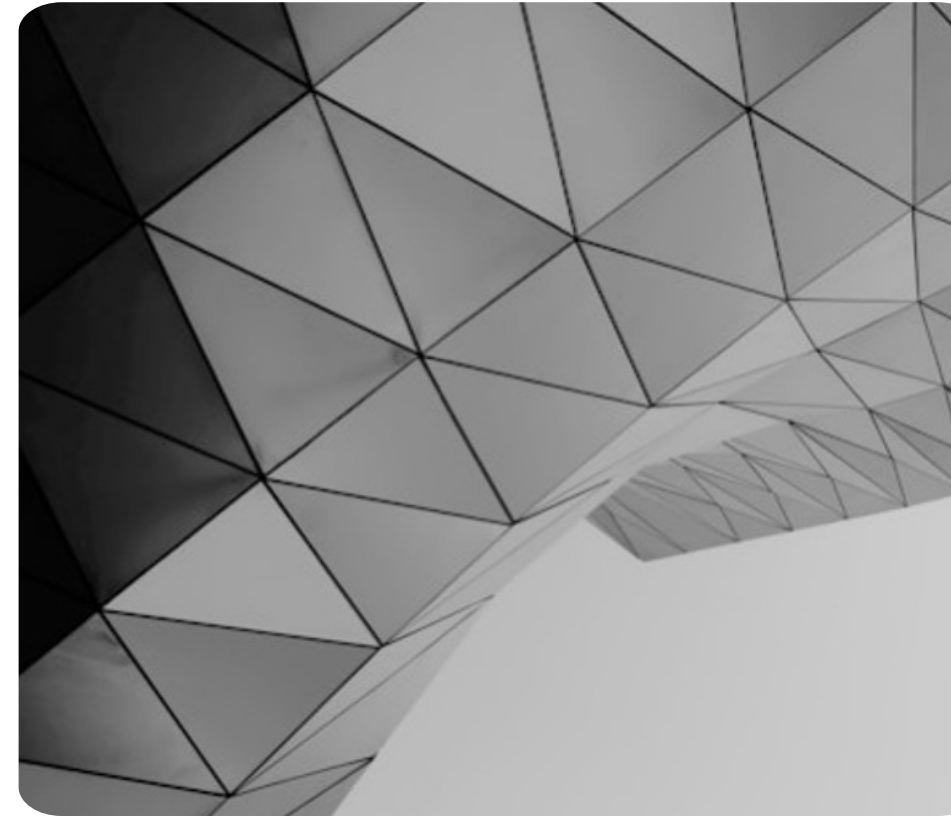
Technology and digital service delivery have moved on significantly in the past two to three decades, and in-house IP departments and law firms that are still relying on the deadline and docketing software they initially introduced in the late 1990s/early 2000s now risk being left behind.

IP professionals must be able to manage all types of IP assets, processes, and services from their chosen IP management technology, from registered patents, trademarks, designs, and domain names to unregistered rights, litigation, licenses, and more.

Outdated systems miss vital opportunities to integrate data, systems, and processes. They also lack the capacity to centralize, consolidate, and integrate service delivery via a single platform.

It is this disconnect between IP systems and services that leads to inefficiencies, redundancies, and information silos. By integrating and centralizing tools and services, we can address the knowledge gap for IP professionals and facilitate greater process automation, portfolio oversight, and cost control. As important, we can extend these benefits outside IP departments and IP law firms to research and development (R&D), finance, and marketing professionals, too.

**Find out more about our suite of [Equinox IP management software](#).**



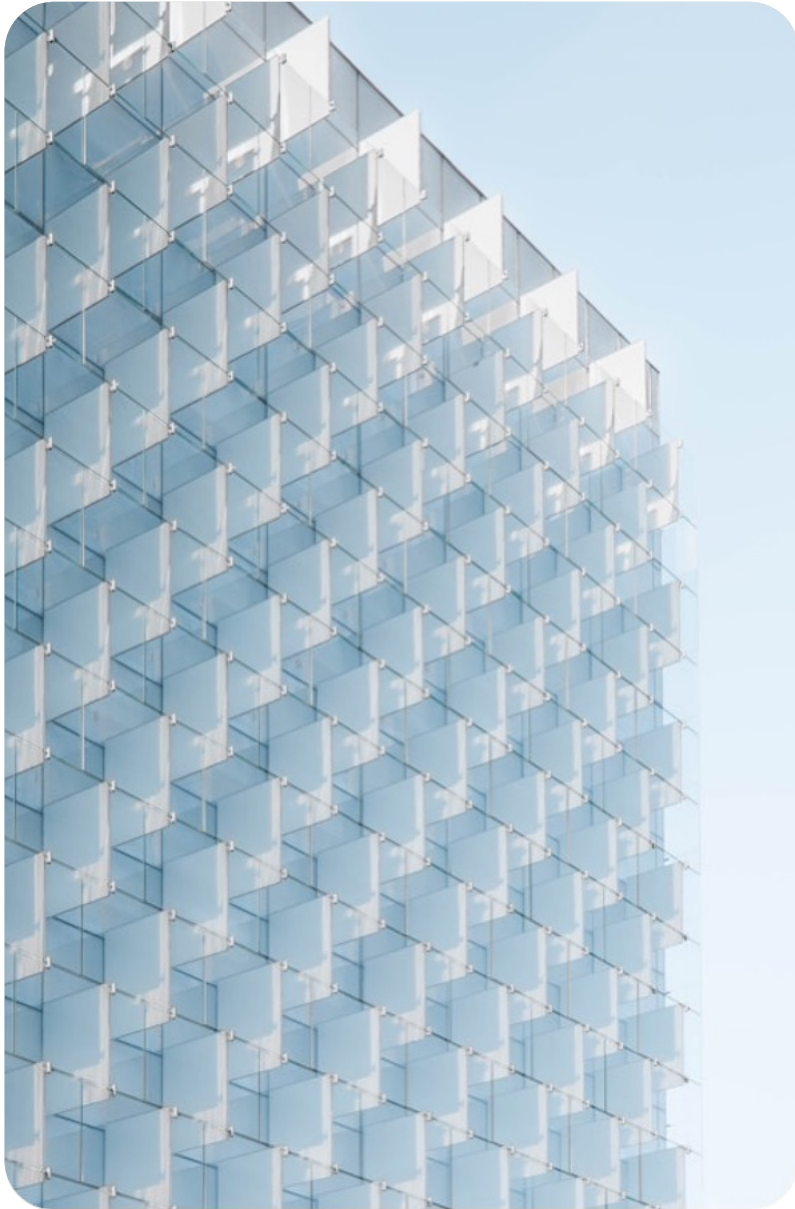


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# The Practical Implications of Artificial Intelligence

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Artificial intelligence (AI) is already bringing measurable benefits for day-to-day users of IP management systems, but there is more to come this year.



## Trend 3: Artificial Intelligence

**Artificial intelligence (AI) has become one of the main buzzwords of 2024, and the phenomenon is only set to grow. Over the next five-to-10-year period, we expect to see a major transformation in IP and business technologies as they start to utilize and leverage more AI-based automation and data processing.**

IP professionals administer vast amounts of routine but high-risk data and processes. AI has the potential to automate these menial tasks, freeing up busy teams to focus on value-adding tasks.

Innovative IP technology and service providers, such as Questel, are already exploring how best to apply these technological advances to benefit our clients. By taking a [holistic and responsible approach](#) to AI now, we can securely and proactively prepare our IPMS and business intelligence solutions to reap the potential benefits of AI, machine learning, and process automation technology tomorrow. Here are just a few IPMS-based tasks we think AI could support IP professionals in the coming years:

### **1. Template creation**

There's potential for the automated creation of structured responses and templates for correspondence and document drafting. While existing templates have already speeded things up, AI could fill in case-specific information on your behalf to deliver further efficiency benefits.

### **2. Response drafting**

AI could be trained to learn writing styles. This would allow it to assess either short-form user-created summaries or even actual client emails and draft responses to them in the user's own words and communication style. The system could then propose a response for approval to save the user valuable time. ➔

### 3. Report creation

Providing AI with a dataset and asking it to create a report could be a huge time saver. There are plenty of existing tools that make producing reports easier, but AI has the potential to make quicker and more personalized reports.

### 4. ChatGPT-style plugins

AI-powered language models such as ChatGPT have the potential to help with everything from report and presentation structures to essays and coding. For example, a ChatGPT-style plugin connected to an IPMS could process tasks on behalf of the user. For example, a client might send an instruction via our Equinox IP management software for a first filing to be started in the UK. The AI would launch that first filing process, creating a matter, gathering the required information, and drawing up tasks, thereby automating a lot of admin work.

### 5. Document classifying and parsing

One of the simplest ways for AI to have an impact is by organizing and triaging communications and documents. Assessing and recognizing correspondence could reduce administration time by automatically organizing files into their relevant categories. Plus, AI could pull data from these documents and send it where it needs to go in your system. In our Equinox IP management software, for example, AI could pull the filing number from an official office document and automatically insert that document into the corresponding case without the need for any human interaction.

**Find out more about the potential AI holds for IP management technology and Questel's responsible approach to AI integration by downloading our eBook '[How AI is Transforming IP Management for Good](#)' or watching our recent webinar '[AI in IP](#)'.**



# Three More Trends On Our IPMS Development Roadmap

**While data, process, service integration, and AI are high on the development roadmap for Questel's suite of [Equinox IP management software](#) in 2024, they aren't the only priorities for our tech team this year.**

**1**

## **Technical support**

No matter how intelligent and sophisticated our technology becomes, we're always going to provide tech support to our clients. Ensuring that users get the support they need as soon as possible is a major priority for all tech companies, and finding smart, diverse solutions is of keen interest to all of us.

**2**

## **Security and performance**

While the ever-increasing connections between digital systems offer opportunities to make our lives easier, the potential security threats are growing in kind. Every organization takes its security very seriously and, while the technology developments here are not as flashy as AI, they remain paramount to the user's experience.

Clients depend on their chosen IPMS to manage and store their data responsibly and securely, so providers are devoting huge resources to security. Even those tech providers with a reliable track record in security are making improvements. Soon, we expect all major IP tech firms will offer a formalized, accredited security qualification, enabling system users to have confidence in their chosen IPMS tool.

**3**

## **System up-time**

When your IP management tool is down, it disrupts your work, so up-time and back-up functionality are two other important considerations for IP professionals when choosing an IPMS.

Our Equinox IP management software has one of the most consistent, reliable up-time records in the industry. However, there is always further to go, and we are constantly working to ensure our users can access their system as needed. We update our system regularly, almost once every two weeks, to deliver the most up-to-date development and security releases and ensure our IP management software runs smoothly.

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# The Future of IPMS Tech Is Closer than You Think

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Our Equinox IP management software is unlocking new benefits for global IP professionals by creating the best IPMS on the market, with many corporations and law firms already feeling the benefits.





## Putting Technology into Practice: A Case Study

We hope in-house IP departments and law firms are as excited as we are about the upcoming technological developments covered in this eBook. However, there's no need to wait to enjoy the benefits of today's IP management tools, as one user of [Equinox Law Firm+](#) explains.

Top-tier patent and trademark firm Kilburn & Strode prides itself on its modern, forward-thinking, and innovative approach to IP management. Unsurprisingly, integration and efficiency were both top of mind when it selected [Equinox Law Firm+](#) as its IP management system.

### **How a leading IP firm succeeds with Equinox**

Thanks to today's web-based systems, the IP management lifecycle is already becoming easier for IP professionals to manage. With entire IP portfolios accessible online and many tasks and processes optimized using AI, Kilburn & Strode recognized the opportunity to drive efficiency and improve oversight and control.

When looking for a new IPMS, the IP firm focused on three main criteria. Firstly, the leading multi-office IP law firm wanted to find a one-stop-shop solution that could enable it to do everything in one system. Secondly, Kilburn & Strode looked for a software with a clean, modern look and feel. And finally, it wanted to work with a like-minded supplier that shared its culture, values, and dedication to innovation and proactive client service.

"[Our] previous IP systems were good for individual functionality but not integrated well or at all, so when we started looking for a new IPMS, we thought: Let's see if we can find an IP management system that can do everything we need."



To optimize the onboarding process, Questel (Equinox) and Kilburn & Strode gathered a team of experts, including representatives from its attorney and docketing teams, to map out the ideal workflow from start to finish, but then the COVID-19 pandemic struck. Despite the challenges of migrating to [Equinox Law Firm+](#) during lockdown, the firm was very satisfied with the results.

#### **The importance of customer support**

"We got a lot of feedback from Equinox on the kind of ways we could improve the system because it was impossible to know before the fact how it would scale up in practice [and] what was really nice was how very responsive Equinox was. Our support team, the Equinox internal help desk team, and the project

all worked together to gather the user feedback, support the users, and be reactive remotely [...] One of the things that I most enjoyed about the Equinox project was actually working together as one extended team."

Kilburn & Strode has been using the Equinox IP management software every day now for two years. The team find the IPMS very easy to use: "It's more streamlined, more efficient, and has completely changed the way they work."

**Find out more about the process of implementing [Equinox Law Firm+](#) and the fantastic results it's producing for Kilburn & Strode today by watching the [video testimonial](#).**



5

# Get Ready to Harness Technology's Potential

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Don't wait to experience the future of IP management technology. Global IP departments and leading IP firms are already benefiting from our Equinox IP management software, and your organization could be the next to join them.

# Start Your Digital Transformation Today

**Your organization has spent years refining its processes into a well-oiled machine, and introducing new software risks new complexity and issues if you don't work with the right partner. Here are our top tips for choosing the right system and provider.**

**1**

## **Flexible and configurable**

IP management technology should enhance how you work and not force your team into a one-size-fits-all system. You don't use your IPMS only to 'docket assets' but also to handle related procedures, including contracts (licenses and non-disclosure agreements), litigation, and oppositions. When choosing a provider, consider how much they can tailor the system to fit your portfolio and processes. Look for a supplier who will adapt to your existing cases and workflows while working with you to enhance your practices. Your chosen tool should also be intuitive and easy to use—like our Equinox IP management software!

**2**

## **Proactively maintained**

Some software companies go years without releasing an update, leaving their users with a system that is slow and vulnerable. Updates iron out bugs and keep your software running smoothly, so when exploring the range of IPMS solutions on the market, ask how often their service is updated and determine the quality of their development teams. A good development team will get users on the latest version of their software as promptly as possible and communicate how these changes will benefit user organizations.

**3**

## **Responsive and supportive**

As you grow, the IPMS you choose should grow with you. Some software providers limit the number of users or clients a subscriber can maintain on the system, making it difficult when the business grows. As a result, organizations should take care to choose a supplier that scales with rather than against their growth. If you take on new staff or clients, you should be confident your IPMS can support you to grow.

## 4

### Knowledgeable and reliable

Your IPMS provider should have its finger on the pulse of the industry and anticipate your needs. You should feel certain that your software is kept in line with every jurisdiction you operate in, with regular updates to the system and pre-set processes. With legal technology becoming increasingly integrated, your IPMS needs to follow this trajectory and include as many integrations as possible with the other IP services you use.

## 5

### Secure and available


When your organization stores any data on an IPMS, you should feel 100% confident that everything in that system is protected. Likewise, an IPMS should be easy to use and available from anywhere. A cloud-based and browser-accessible system is the best option, as it can be accessed from a variety of devices and does not require a time-consuming software download. This helps your team access the system more quickly and stay responsive when needed. It's much simpler for home working too, as you don't need to worry about remote desktops.

## 6

### Dedicated support

Your team needs to know that it can get effective support. IP management is time-sensitive and requires quick action, so if there's an issue, you need to be sure that it can be resolved quickly to keep your portfolio on track. Take the time to consider the quality of an IPMS provider's support team. Is support available when you might need it? How quickly can they respond to your queries? The strongest software companies have a dedicated helpdesk that will respond to your issue promptly.

Overall, the best way to choose an IPMS is to consider the quality of your experience with the software from your first exposure to the system right through to when you need support. Choose a provider that gives you confidence in its service from day one.




**Questel is paving the way for IP management systems to evolve into smart, efficient tools for every IP professional. To find out how our Equinox IP management software can magnify your abilities and help you thrive, [contact us for a product demo](#) today.**





Questel is a true end-to-end intellectual property solutions provider to more than 20,000 clients and 1.5 million users across 30 countries. We offer a comprehensive software suite for searching, analyzing, and managing inventions, patents, designs, trademarks, and domain names. Questel also provides services supporting the IP lifecycle, including searching, watching, international filing, translation, renewals, and recordals. These solutions, when combined with our IP cost management platform, deliver clients an average savings of 30–60% across the entire prosecution budget. Beyond IP, Questel has become a leader in innovation management (of ideas, partnerships, technologies), legal operation management (of contracts, legal documents, ebilling, and cases), and localization (life science, legal translation, corporate localization).

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[Contact our subject matter experts](#) to find out more about any of the topics discussed in this eBook, including how to implement our Equinox IP management software effectively in your organization.



### About the Authors

**Tom Parish** (left) is the Commercial Director and **Sam Thorley** (right) is the Head of Platform at Equinox, part of the Questel group. Using his extensive knowledge of the IP management process, Tom leads the Equinox team in delivering an intuitive system and unparalleled services to IP professionals across the world. Sam employs his years of experience in tech development to bring the next generation of tech software to the industry.

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