

IPMS Health Check

A fast, focused self-assessment for corporate IP teams and IP law firms.

You can't manage what you can't see, and in intellectual property, blind spots are expensive. From in-house teams overseeing sprawling portfolios to law firms safeguarding client assets, visibility is everything. The wrong system doesn't just slow you down – it quietly chips away at efficiency, opens the door to compliance risks, and traps your top talent in tedious admin.

This quick self-check is designed to help you spot the red flags early – before they become missed deadlines, financial penalties, or frustrated stakeholders.

Take 5 minutes. Get clarity. Stay ahead.

Quick Instruction:

1. Choose your path: Corporate team or Law firm
2. Check all that apply – if you tick more than 5, it might be time to explore a new system.

Corporate IP teams: your portfolio should work as hard as you do

- ☐ I can't easily give leadership real-time portfolio insights.
- ☐ I track patents, trademarks, and other IP in multiple tools.
- ☐ Invention disclosures are handled manually.
- ☐ Docket dates require manual calculation.
- ☐ Collaboration with inventors and business units is inefficient.
- ☐ Audit trails are incomplete or hard to retrieve.
- ☐ The system can't flex for M&A or process changes.
- ☐ It's hard to access securely when working remotely.
- ☐ We don't have a single source of truth for all IP assets.
- ☐ Budget tracking for IP spend is manual or approximate.
- ☐ We can't quickly produce accurate fee estimates for patent and trademark renewals.
- ☐ Our workflows don't adapt as projects or priorities change.
- ☐ I can't easily pull tailored reports for different stakeholders.
- ☐ The system doesn't automatically check for missing or inconsistent data.
- ☐ Tracking renewal deadlines across jurisdictions requires multiple tools or spreadsheets.
- ☐ Finding related filings, prior art, or family records means leaving the IPMS.
- ☐ There's no link between IP records and related contracts, licenses, or assignments.
- ☐ Analytics by business unit, product line, or geography require manual data manipulation.
- ☐ Our IPMS doesn't integrate smoothly with ERP, CRM, HR software, e-billing systems, etc.

IP law firms: Serving clients shouldn't mean fighting your system

- ☐ I manage client portfolios in separate spreadsheets or tools.
- ☐ Docketing deadlines require double entry.
- ☐ Client reporting is manual and time-consuming.
- ☐ Clients can't securely view their portfolio online.
- ☐ Routine updates require phone calls or emails.
- ☐ We can't easily template repeat tasks.
- ☐ Adding new clients means extra admin burden.
- ☐ Remote access is limited or insecure.
- ☐ It's difficult to customize reports by client preferences.
- ☐ Our docketing team spends more time on admin than on analysis.
- ☐ Billing integration with our IPMS is cumbersome or non-existent.
- ☐ Communication history with clients isn't centralized.
- ☐ Our system doesn't automatically flag incomplete records or data conflicts that could put deadlines at risk.
- ☐ We can't track client-specific jurisdictional rules without manual workarounds.
- ☐ We lack the ability to create merged PTO forms and response templates/shells.
- ☐ Our IPMS can't easily generate WIP or unbilled activity reports.
- ☐ Searching for historical correspondence or filings is time-consuming.
- ☐ We can't quickly produce accurate fee estimates for patent and trademark renewals for clients.
- ☐ Our system doesn't provide clear visibility into foreign associate deadlines.

Did you select more than five? It might be time to upgrade your IPMS system.

Get in touch, today.

About Clarivate

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