



*Presented by*  
**Falconbury**

# IP and Commercialisation: Creating and Maintaining your IP Portfolio

**1 August 2024**  
+ 14 November 2024

A practical course focussing on the internal and external considerations of using IP to enhance your business strategy.



**Format:**  
Live online



**CPD:**  
12 hours for your records



Certificate of completion

# Course overview

**This practical and intense IP (intellectual property) and commercialisation course encompasses internal and external considerations of using IP within business strategy.** It takes you through strategies to manage your IP portfolio while focussing on achieving the best results for your business.

The first part focuses on aspects of creating and maintaining an IP portfolio: IP management. The second part considers external aspects of working with IP in your ecosystem: Commercialisation with IP.

**Part 1 - IP management:** covers invention harvesting (identification, capture and assessment), procedures in applying for patents, looking after trade secrets, managing your IP portfolio, budgeting for IP and ownership of IP. To start the course, we will confirm our knowledge on IP rights.

**Part 2 - IP commercialisation:** introduces strategies for working with others in the innovation ecosystem. Topics will include confidentiality agreements, handling IP matters in contracts. Looking at techniques on identifying applications and potential markets for your innovation, and considering competitor issues along the supply chain.

Throughout this course the expert trainer will give you insights into how to manage your portfolio and get the best results for your organisation. There will also be plenty of time for delegates to ask questions and gain valuable feedback.

## Benefits of attending

By attending this course, you will:

- **Learn** to create an IP policy for your business
- **Understand** what IP is registerable and what isn't
- **Get to grips** with different IP rights
- **Gain insights** into evaluating your inventions
- **Enhance** your IP management skills
- **Identify** your potential customers and partners
- **Develop** your skills to negotiate NDAs

## Who should attend?

This course has been specially designed for:

- In-house IP managers
- Technology transfer officers
- Private practice patent attorneys
- IP lawyers and legal advisers
- R&D managers

As well as all professionals responsible for managing an IP portfolio.

# Programme

## Part 1: IP management

- Introduction
- An IP (intellectual property) policy for your business
- IP: Registrable and unregistrable
- IPRs:
  - Patents
  - Designs
  - Trademarks
  - Utility Models
  - Trade secrets
  - Software
  - IP management
  - Information management
- Inventions harvesting, disclosure
- Evaluating inventions for your business
- Inventions and ownership
- Assignments of IPRs
- Freedom To Operate
- Practical exercise: Recognising inventions and deciding how to manage them
- IP budgeting

## Part 2: IP commercialisation

- IP strategy: external aspects of IP
- Valuing your IP
  - Valuation methods
- IP and the supply chain:
  - Competitors
  - Customers
  - Suppliers
  - Partners
  - Licencees
- Confidentiality agreements
  - NDAs (non-disclosure agreements)
  - MTAs (material transfer agreements)
- IP and contracts
- Licensing your IP
- Finding customers, partners
- Practical exercise: Negotiating NDAs and IP clauses in contracts
- IP audit
- Summary and resources

# Presenter



## Jane List

**Jane List** founded Extract Information Limited, Cambridgeshire, UK, in 2013. Extract Information provides legal and industry focussed patent searching and reporting, IP management support for small companies, and product development consultancy for the information industry.

Jane previously worked in IP and Information analyst roles at The Technology Partnership (TTP) plc, Xaar plc and the European Molecular Biology Laboratory. She also worked in the information industry where she held commercial, content, and product development roles at Lighthouse IP, ProQuest, and DataStar. Throughout her career she has provided training in the retrieval and analysis of scientific, technical, medical, commercial and patent information, most recently through CIIPM where she developed the courses in IP and Commercialisation. Jane has qualifications in Chemistry, Information Science, and IP Law.

# Course dates

**1 August 2024**

**Live online**

09:30-17:00 **UK (London)** (UTC+01)

Course code 14296

GBP ~~499 599~~

EUR ~~719 859~~

USD ~~823 979~~

**Until 27 Jun**

**14 November 2024**

**Live online**

09:30-17:00 **UK (London)** (UTC+00)

Course code 14297

GBP ~~499 599~~

EUR ~~719 859~~

USD ~~823 979~~

**Until 10 Oct**

## How to book



**Online:**

[ipi.academy/2714](https://ipi.academy/2714)

Alternatively contact us to book, or if you have any queries:



**Email:**

[info@ipi.academy](mailto:info@ipi.academy)



**Phone:**

[+44 \(0\)20 7749 4749](tel:+442077494749)

## Discounts

- Booking more than one delegate on any one date qualifies for a **15% discount** on the second and subsequent places.
- Most events qualify for an **early booking discount** prior to 6 weeks before the course date. Be sure to check on our website, where the latest discounts will be shown.

## Further information

### Fee

The fee includes all meals and refreshments for the duration of the course (for venue-based courses) and a complete set of course materials (provided electronically). If you have any particular requirements, please advise customer services when booking.

### Please note

IPI Academy (and our training partners) reserve the right to change the content and timing of the programme, the speakers, the date and venue due to reasons beyond their control. In the unlikely event that the course is cancelled, we will refund the registration fee and disclaim any further liability.

### Terms and conditions

The rest of our terms, the event cancellation policy and the terms and conditions are on our website, please visit [ipi.academy/content/terms-and-conditions](https://ipi.academy/content/terms-and-conditions)



## Run this programme in-house for your whole team

Coming to IPI Academy for your in-house training provides an all-inclusive service which gives you access to a wide variety of content, learning platforms and delivery mechanisms as well as your own personal training adviser who will work with you from the initial enquiry through to feedback and follow-up after the programme.

With over 600 trainers, all practitioners and experts across a huge range of fields, we can provide the training you need, where you need it, when you need it, and at a price which suits your budget. Our approach to tailored learning and development consists of designing and delivering the appropriate solution for each client.

For your FREE consultation and to find out more about how we can work with you to solve your training needs, please contact our training advisers:



**ALEKSANDRA BEER**

**Tel:** +44 (0)20 7749 4749

**Email:** [inhouse@ipi.academy](mailto:inhouse@ipi.academy)



**YESIM NURKO**

**Tel:** +44 (0)20 7749 4749

**Email:** [inhouse@ipi.academy](mailto:inhouse@ipi.academy)



**IPI**  
Academy

IPI Academy is a training initiative of Falconbury and Management Forum; leading providers of industry training for over 30 years, based in the UK.

10-12 Rivington Street  
London EC2A 3DU

[ipi.academy](http://ipi.academy)

**Tel:** +44 (0)20 7749 4749

**Email:** [info@ipi.academy](mailto:info@ipi.academy)