



Staying on TOP of your IP Asset Management Database System Project

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In my discussion about how IP asset management (IPAM) database can enhance your marketing efforts,¹ I provided the business case for utilizing a robust IPAM solution for your Technology Transfer Office (TTO). But what if you need to migrate to a new system? There are a number of drivers that might prompt your organization to consider migrating to a new solution, including:

- Migrating to a Web-based IPAM solution that is more intuitive and is easier to access, maintain, and enhance
- Migrating to a new IPAM solution that provides higher reliability and improved customer service, and is more cost effective
- Migrating to a more robust IPAM solution that will scale to meet the increased volume of transactions that your office is managing and provide you with comprehensive reporting and management capabilities
- Migrating to a more comprehensive IPAM solution that provides support across your entire intellectual property (IP) lifecycle

Regardless of the reason, making a decision to investigate and evaluate alternatives to your existing IPAM database system is a very challenging and often underestimated endeavor. When initiating an IPAM migration project, it is essential to stay on top of your mission through careful planning of the following three critical areas that will position you for success:

- **Technology:** Selecting the right solution and solution partners
- **Organization:** Anticipating the migration's impact on your organization and proactively developing and implementing a successful change management program
- **Process:** Assembling the right project team and developing a practical project plan to position your organization for a successful implementation

Technology

The Technology element is quite often the easy part, but also the area in which we tend to focus most of our time and energy. Assuming that you are not developing

¹ See "Using an IP Asset Management Database to Enhance Your Marketing Efforts," available in the Insights section of <http://www.fuentek.com>



your own IPAM solution using in-house resources, it's best to not get overly immersed in specific features and functions of a new system. Rather, the more important strategy is to select a qualified strategic partner that will support you throughout the life cycle of your solution. Best practices in the selection of Technology for your IPAM solution include:

Thoroughly understand and document your requirements. These institutional/enterprise IP management and integration requirements should take precedence over “nice to have” features and functions.

Rate and rank your requirements. It is helpful to develop an evaluation matrix or tool that enables you to weight and prioritize requirements along with the qualifications of your vendors.

Invest a commensurable effort in evaluating your target solution vendors. Consider not only what the vendor is offering today, but examine their track record, the stability and effectiveness of their leadership team, company culture, market leadership, and ultimately their ability to support your organization on a long-term basis.

Interview current customers as references for your top solution candidates. Choose a cross-section of clients whose requirements are similar to those of your institution.

Organization

The Organization element is often the most challenging element with the greatest impact on the overall success of your project. Specific Organization best practices include:

Be proactive and diligent in managing expectations and perceptions. This is critical from initial planning through the post-implementation phase of the project, especially if you are migrating from a custom, proprietary solution to a commercial software solution. Ensure that end-users have a realistic set of expectations regarding how and what the new system will do for them (in terms of features, functions, and capabilities) and that they understand that interacting with the new IPAM system will be a different experience.

Prepare for the change management impact on your organization. Do not introduce other organizational or process changes simultaneously, if possible. In addition:



- Maintain a firm grasp on the current realities, challenges, and opportunities across your institution
- Ensure that the appropriate energy, priority, and focus are maintained on your migration project until the desired results and key milestones have been achieved
- Assemble the right skills and talent on the project team to ensure that the organization will meet its overall goals (see below)
- Facilitate feedback and open communication about the migration process
- Establish a foundation for setting and managing expectations for effective and reliable project execution
- Institutionalize the desired changes from your systems migration effort

Carefully plan for just-in-time training. Although it can be challenging to orchestrate, train the system users who will be impacted by the migration project simultaneously with granting them access to your new system. If you train too early, it could potentially cost you a tremendous amount of time in support costs over the long term. Training too late can result in negative impressions about your new IPAM system because users are not properly prepared to deal with the changes. Remember that first impressions can be extremely difficult to change.

Engage other groups across your organization early on. If your system implementation is going to impact several groups or departments across your institution, engage key members from these areas up front as a spokesperson and member of your project evaluation and implementation team. Engage them, gain their support, and take advantage of the new and valuable perspective they bring to your team.

Process

The Process element is a challenging aspect of any large project. Key aspects of this element include assembling a project team, empowering and positioning them for success, and investing time in developing a realistic project plan. Specific best practices related to the Process element include:

Don't fall into the trap of underestimating requirements. The first time you embark on a systems migration project, it is very easy to underestimate the resource and schedule requirements. It is also very easy to underestimate the extent of legacy data migration and system integration challenges—especially if there have been multiple generations or versions of your current software solution. So, consider your requirements carefully. Once you think you know how much time you



will need for the migration itself and to handle system integration, consider adding time to your schedule—you will almost *always* need it the first time out.

Manage expectations for your project team. Your team should be accountable for the project beyond the initial implementation to ensure that all your key project goals are achieved. Don't get distracted and return to business as usual (i.e., your regular job duties) after the initial implementation of a major technology solution. Key roles to consider include:

- **Program Manager:** Responsible for project schedule, technical architecture, software and hardware platforms selection, project communications, and change management
- **Process Manager:** Responsible for planning and updating key operational processes in alignment with changes, constraints, and opportunities provided by your new IPAM solution
- **Data Manager:** Responsible for the legacy data migration into the new system and the new data standards that you will implement to take full advantage of your new system

Be proactive in vendor communications. Communicating effectively with vendors up front can help you align perceptions, expectations, goals, and objectives to ensure a successful outcome for both parties.

These best practices represent Fuentek's experience with systems migration.

If you would like to discuss the concepts presented here in further detail, please contact Fuentek at info@fuentek.com or 919-249-0327.