Intellectual Property Portfolio Strategy Course

2 – 6 August 2027
San Diego

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Training Center

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Ref: 963_173457 **Date:** 2 – 6 August 2027 **Location:** San Diego **Fees:** 14000 Euro

Overview

Intellectual Property Portfolio Strategy Course is a 1-week course for legal, innovation, brand, contract, and IP professionals who leave with an IP Portfolio Strategy and Action Plan. Participants connect rights selection, ownership, records, protection controls, licensing, commercialization, monitoring, enforcement choices, and business risk. Agile Leaders Training Center delivers this course on intellectual property portfolio strategy.

Who Should Attend

- Teams responsible for patents, trademarks, copyright, designs, and trade secrets.
- Functions responsible for innovation ownership and invention records.
- Teams responsible for brands, creative assets, and digital content.
- Functions responsible for licensing, contracts, and commercial partnerships.
- Leaders responsible for legal risk, governance, and portfolio priorities.

The course assumes participants contribute to intellectual property or commercial decisions and leaves out jurisdiction-specific legal advice and filing procedures.

Departments and Industries

The course supports intellectual property portfolio decisions across technology, consumer goods, healthcare, media, manufacturing, and professional services.

- Legal and intellectual property
- Research, innovation, and product development
- Marketing, brand, and creative operations
- Procurement, contracts, and partnerships
- Risk, governance, and corporate strategy

Learning Objectives

By the end of this course, participants will be able to:

- Analyze business assets and select appropriate intellectual property rights.
- Build ownership, evidence, and portfolio records.
- Apply confidentiality and trade secret controls.
- Evaluate licensing and commercialization options.
- Prioritize monitoring, enforcement, and risk responses.
- Develop an IP Portfolio Strategy and Action Plan.

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Course Agenda

Day 1: Rights and Business Assets

- Intangible Asset Identification Map
- IP Rights Selection Decision Tree
- Patent, Trademark, Copyright, and Design Comparison Matrix
- Trade Secret Suitability Assessment
- Business Objective and IP Alignment Canvas

Day 2: Ownership and Portfolio Records

- Creation and Ownership Evidence Register
- Employee and Contractor Rights Checklist
- IP Portfolio Classification Model
- Rights Status and Renewal Control Log
- Portfolio Data Quality Review Method

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Day 3: Protection and Commercial Use

- Confidential Information Classification Framework
- Trade Secret Protection Control Plan
- Licensing Scope and Rights Matrix
- Commercialization Options Appraisal
- Third-Party IP Due Diligence Checklist

Day 4: Monitoring, Enforcement, and Risk

- IP Monitoring and Evidence Capture Plan
- Suspected Infringement Triage Matrix
- Enforcement Options Decision Framework
- IP Risk and Dependency Register
- Portfolio Priority Scoring Model

Day 5: Portfolio Strategy Practice

- Suggested Exercise: Rights Selection Case
- Suggested Exercise: Ownership Record Review
- Suggested Exercise: Licensing Options Decision
- Suggested Exercise: Enforcement Response Prioritization
- Capstone Exercise: IP Portfolio Strategy and Action Plan

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Practical Exercises

The course uses suggested activities to connect intellectual property evidence, commercial choices, controls, and governance decisions.

- Suggested activity: map inventions, brands, content, designs, and confidential information to suitable rights.
- Suggested activity: review ownership evidence and identify record gaps across employees, contractors, and partners.
- Suggested activity: compare licensing structures and protection controls for a new product.
- Suggested activity: prioritize monitoring and enforcement responses using value, evidence, exposure, and urgency.

FAQs

Who suits intellectual property portfolio strategy training, and what does it assume?

Legal, IP, innovation, brand, contract, risk, and strategy professionals suit the training. It assumes involvement in asset, rights, or commercial decisions and excludes jurisdiction-specific legal advice and filing procedures.

How does intellectual property portfolio strategy differ from patent filing training?

Intellectual property portfolio strategy coordinates multiple rights, ownership, licensing, controls, monitoring, and risk; patent filing training focuses on preparing and prosecuting patent applications.

How should intellectual property rights be selected for a business asset?

Rights are selected by examining the asset, business objective, disclosure needs, ownership evidence, commercial use, protection scope, lifecycle, cost, and enforceability.

What records support intellectual property portfolio governance?

Portfolio governance uses asset inventories, ownership evidence, agreements, status records, confidentiality controls, licenses, monitoring evidence, risk registers, and decision logs.

Conclusion

Participants take back an IP Portfolio Strategy and Action Plan linking business assets, rights, ownership, protection, licensing, monitoring, enforcement, and risk. The plan makes priorities, responsibilities, evidence, and decisions visible. It supports coordinated action across legal, innovation, brand, contract, and leadership teams.