IPI Academy

MANAGEMENT forum



Presented by
Management Forum

State of the Art Patent Searching

24 June 27
+ 2 December 27

Master comprehensive patent searching techniques for state-of-the-art reviews. Learn strategic content selection, AI tools, result analysis, and ongoing monitoring in this expert-led training course.

Format:
Live online

CPD:
6 hours for your records

Certificate of completion

Course overview

This training course will teach you the essential skills for conducting comprehensive 'state of the art' patent searches.

Our expert trainer will guide you through selecting the right content, putting together and executing an effective search strategy, and analysing and reporting your findings.

While the focus is on patent searching, the training course also explores when and how to incorporate other technical literature into your state of the art review, depending on your specific field.

A state of the art search must be broader than a typical patentability search. You will learn about standard search protocols, and how to balance recall and precision, ensuring relevance for optimal results. The training course emphasises practical techniques, including the use of patent classifications, patent citations, and name searching, to build a robust collection for an initial state of the art review. The course will consider when and how to use AI search and analysis tools during the search and review process.

Given that the state of the art is always evolving, the course will also cover how to stay up to date by setting up effective technology patent monitoring processes. This will ensure you remain informed about the latest advancements in your field.

Benefits of attending

By attending this training course you will:

- **Expand** your knowledge of the importance of State of the Art searching
- **Learn** when to carry out the search and how to select the content
- **Get to grips** with search techniques and how to analyse your results
- **Learn** when AI (artificial intelligence) tools might be beneficial
- **Understand** how to report your results
- **Clarify** techniques to stay up to date with State of the Art

Who should attend?

This training course is for all those working in IP or patent information or patent engineer roles, either in industry or legal businesses, and wanting to improve and / or update their search skills.

The course will be of particular interest to:

- IP managers
- Patent research specialists and analysts
- Technology transfer officers
- R&D and technical product managers
- R&D scientists and engineers wanting to ensure they are not 're-inventing the wheel'
- Sales and support professionals of commercial information providers

Programme

Content selection

- Patents, NPL (non-patent literature), Standards
- Database selection
- Date coverage
- Country coverage
- Search tools, including AI tools

Search techniques

- Concept definitions, preparing the strategy
- Relevance
- Recall and precision
- Broadening your search statements
- Narrowing your search statements
- Classifications
- Citations
- Name searching
- Techniques for specific technical fields (chemistry, biotech, mechanical, devices, ICT)
- How AI can help with search

Analysing the results

- Clean up
- Categorisation of large sets
- AI as a tool for analysis of results
- Understanding patent families
- Identifying trends, pivital patents, key players, emerging opportunities
- Reporting styles

Maintain awareness of the State of the Art

- Setting up alerts
- Reviewing and re-running the searches
- Dissemination of the results

References for further study

Presenter



Jane List

Jane List founded Extract Information Limited, Cambridgeshire, UK, in 2013 following a career in the information industry where she held commercial, content, and product development roles at Lighthouse IP, ProQuest, and DataStar. She has also held IP and Information analyst roles at The Technology Partnership plc, Xaar plc and the European Molecular Biology Laboratory. Jane has provided training in the retrieval and analysis of scientific, technical, medical, commercial and patent information throughout her career. At Extract Information Jane searches patents for her clients and provides IP management support. Jane has qualifications in Chemistry, Information Science, and IP Law.

Jane has other roles in patent information field:

- Editor in Chief of World Patent Information Journal, a leading journal in the field of patent information and IP management since 2014 https://www.journals.elsevier.com/world-patent-information.
- Secretary of PatCom, the group of commercial patent information providers (www.patcom.org) since 2014.
- In 2015 Jane List co-founded The Cambridge Information and Intellectual Property Meeting (www.CIIPM.co.uk) to provide a space for knowledge sharing for those involved with technology commercialisation and needing to understand more about IP and understand more about patent searching.

Course dates

24 June 27	**Live online** 09:30-17:00 **UK (London)** (UTC+01) *Course code 17260*	GBP **599** ~~699~~ EUR **839** ~~979~~ USD **963** ~~1,119~~ **Until 29 Apr**
2 December 27	**Live online** 09:30-17:00 **UK (London)** (UTC+00) *Course code 17548*	GBP **599** ~~699~~ EUR **839** ~~979~~ USD **963** ~~1,119~~ **Until 07 Oct**

How to book

Online:
ipi.academy/2601

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

Email:
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Discounts

- Booking more than one delegate on any one date qualifies for a **30% 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 the our terms, the event cancellation policy and the terms and conditions are on our website, please visit 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:



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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.

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