



OCEAN TOMO

FIXED FEE VALUATION REPORTS

Ocean Tomo offers an array of Fixed Fee Valuation Reports tailored to our clients' individual priorities and needs. Listed below are descriptions for the deliverables available within Ocean Tomo's Fixed Fee Valuation Reports:

FIXED FEE VALUATION REPORTS

VALUATION REPORT DELIVERABLES

	Technology Market Report	Single-Methodology Valuation Report	Multiple-Methodology Valuation Report	Technology Licensing Report
Market Assessment	•	•	•	•
Royalty Base Approximation	•	•	•	•
Royalty Rates Estimate	•	•	•	•
Patent Relevancy	•	•	•	•
Single-Methodology Valuation		•		•
Multiple-Methodology Valuation			•	
Patent Claim Review				•
Enforcement Review				•

MARKET ASSESSMENT

The first step towards assessing IP value is obtaining an understanding of market potential. Ocean Tomo's market assessment analyzes performance of intangible assets by mapping past and present trends within the technological sector in question, providing clients with an analysis of present and future potential. The market assessment tracks key market players, competitors, potential buyers, and licensees. As a result, clients are able to understand the demand for the technology in question, and obtain a sense for the appropriate royalty base if the subject technology is licensed.

ROYALTY BASE & ROYALTY RATES

Building upon the valuation report's market assessment, estimates will be provided for a particular technology's royalty base and anticipated royalty rates. Employing their IP transaction and valuation expertise, Ocean Tomo professionals determine the optimal approaches for obtaining accurate royalty base and royalty rate estimates. Clients are presented with both the size of the royalty base and the range of realistic royalty rates that could result from licensing the technology in question.



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PATENT RELEVANCY ANALYSIS

Employing the PatentRatings® system, the patent relevancy analysis grants clients the ability to identify related patents, patent holders, potential infringements, buyers, and sellers. Patent relevancy scores are numerical measures ranging from 1.0 to 0.0, created by mapping and analyzing all U.S. patent citational relationships. The patent relevancy contains an analysis of companies with patent portfolios most like the subject technology. The patent relevancy engine is “market validated” and derived from regression optimized formulas that measure the probability of a direct citation by the patent examiner or applicant at the first generation. Clients benefit from the analysis by receiving a greater understanding of the relative value of the subject technology, and by receiving a concrete and comprehensible illustration of the technology’s scope and influence.

SINGLE-METHODOLOGY VALUATION DETERMINATION

In order to accurately value intellectual property, experts must be acquainted with existing methodologies, and understand when particular approaches are necessary and appropriate. For the single-methodology determination, Ocean Tomo professionals employ research, specialized knowledge, and a keen understanding of context and client needs to strategically select the most appropriate valuation approach. Clients are then provided with a compelling and practical dollar value for their IP of interest.

MULTIPLE-METHODOLOGY VALUATION DETERMINATION

Clients in need of a more rigorous valuation report may request a multiple methodology valuation determination. This valuation model utilizes multiple valuation approaches including the Income, Market, and Cost approaches. In addition to being provided with a dollar value for any IP of interest, the multiple-methodology determination addresses scrutiny from auditors when signing off on company accounts, mitigates the risk of the SEC requiring a company to restate its financial information, and serves as an invaluable resource in the case of IP litigation.

PATENT CLAIM REVIEW

A patent is only as strong as the claims it makes, and a subtle misstep in wording is all it takes to significantly change patent value. In partnership with outside experts, Ocean Tomo’s valuation reports may contain a patent claim review section which includes a scrupulous examination of patent claim language. Clients receive a thorough understanding of patent coverage, and valuable insight into the strength of a patent’s claims.

ENFORCEMENT REVIEW

Adopting an appropriate licensing strategy can be a daunting task for even the most experienced of IP professionals. The valuation report’s enforcement review section makes the licensing process more accessible, outlining the steps necessary to establish a successful licensing campaign. The enforcement review grants clients an effective and comprehensible “how-to” guide for licensing, allowing them to grasp the realities of the IP marketplace and strategically maneuver through the pitfalls of licensing.

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