



# ANALYTICS



Ocean Tomo's Strategic Analytics products and services assist innovative companies in actively managing their intellectual property portfolios. Services offered through the Strategic Analytics group support both in-house transaction diligence and client-side evaluation and development efforts. Primary service offerings are tailored to meet the needs of a diverse client base ranging from start-ups to Fortune 500 entities.

Many of Ocean Tomo's Strategic Analytics services are available unbundled, and on a fixed rate or project basis. The product of Ocean Tomo's work is insightful, detailed, and rigorous, utilizing both qualitative judgment and quantitative methods. Close collaboration with clients may, in certain cases, require relocation of Ocean Tomo analysts to a client site for longer term engagements.

## Standard Reports

Today, intellectual property and patent data is widely available, but the sources of data and the formats in which these data are presented are not practical for quickly and efficiently deriving meaningful business intelligence. Various software tools address these challenges, but typically require a specialist to extract useful information and analysis.

### **PATENT PORTFOLIO REPORT**

This report is an inexpensive method of analyzing your patent portfolio using a top-down approach. The Patent Portfolio Report gives insight into the effectiveness of your current IP policies, your firm's ranking with competitors, the quality of your patent holdings individually and in total, and the level of activity around your patent holdings.

### **COMPETITIVE LANDSCAPE REPORT**

This report contains all of the relevant information required to assess the competitiveness of a given technology in the marketplace. Focusing on a set of narrowly defined patents, the Competitive Landscape Report provides a set of patents with which to compare, a review of the companies who are currently holding patents in the space, and a comparison of the market position of each company's technology.

### **CROSS-LICENSING REPORT**

Many cross-licensing agreements are lopsided, where one participant provides more value than another. The Cross-Licensing Report compares the relative advantages of each pool in the agreement and assesses whether the match is equivalent.

## Custom Reports

Ocean Tomo's Strategic Analytics division also offers the flexibility for users to tailor the scope of the technology, horizon, and reporting of information. Custom Reports may be updated on a periodic basis or upon request.

# Analytics Consulting Services

The Ocean Tomo Strategic Analytics team has extensive experience consulting with IP, investment, and other business professionals to inform decisions regarding the following:

- IP portfolio review and categorization
- Portfolio development, identification, and assessment
- Acquisition of target IP portfolios
- IP transaction due diligence
- Monetization and commercialization strategies

## THREE-YEAR PLAN

In particular, Ocean Tomo's Strategic Analytics division offers a Three-Year Plan for firms to move from IP collection to active IP monetization. The Plan offers all of the data services and expertise to analyze a firm's current standing in the market, assess which IP is most valuable, and then strategize the most effective means of achieving specific goals. The Plan provides for on-going support of all monetization activities while your firm increases its profitability with under-utilized assets in its IP collection.

## ACQUISITIONS ANALYSIS

Ocean Tomo provides clients with the advice required to navigate today's ever-changing IP landscape. Strategic Analytics professionals actively provide advice to companies dealing with the uncertainty surrounding the emergence of Patent Licensing and Enforcement Companies (PLECs). Through the use of analytical tools, Ocean Tomo can evaluate a client's portfolio in comparison with those of its closest competitors and use that intelligence to formulate a strategic IP plan to maximize the value of the client's innovation.

Acquisitions Analysis services include:

- IP Inventory & Classification
- IP Business Plan
- Intellectual Asset Management
- Patent Maintenance Program
- Strategic IP Acquisitions
- Ongoing Strategic IP Advisory

## About Ocean Tomo

Ocean Tomo, the Intellectual Capital Merchant Banc™ firm, provides companies with financial services related to intellectual property and intangible assets including financial expert testimony, valuation, strategy consulting, patent analytics, investment advisory, innovation management consulting and transaction brokerage.

Our Opinion, Management, and Advisory Services are built upon more than three decades of experience valuating intellectual property in the most rigorous of venues – State, Federal and international courts. Our financial, market and technical experts provide a unique understanding of the contributory value of proprietary innovation. This is the cornerstone of our business. This insight permeates every practice and client engagement.

Collectively, Ocean Tomo professionals have:

- Executed over 1000 engagements involving IP worth in excess of \$10 billion;
- Successfully closed transactions where disruptive technology played a key role, with cumulative value in excess of \$750 million;
- Conducted over 300 valuation engagements and 500 financial damages expert testimony engagements.

Ocean Tomo assists clients – corporations, law firms, governments and institutional investors – in realizing Intellectual Capital Equity® value broadly defined.



## CONTACT

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Gregory Campanella is responsible for leading Ocean Tomo's Management Services Group and is a Managing Director in the Valuation practice. Mr. Campanella's work has focused on valuations of intangible, intellectual property and tangible assets for acquisitions and divestitures, bankruptcy and restructuring, establishment of monetization strategies including licensing, mergers and joint venture/partnership formations, litigation support, and financial reporting and tax matters.

