



OCEAN TOMO

# 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



## CONTACT

### Gregory Campanella

Managing Director

+1 415.946.2605

gcampanella@oceantomo.com

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.

Mr. Campanella also has experience performing business enterprise, equity and debt valuations. Industries in which he has experience include telecom, computer hardware and software, entertainment, semiconductors, life sciences/pharmaceuticals, wireless and wired communication, e-commerce, among others.





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## About Ocean Tomo

Established in 2003, Ocean Tomo provides Financial Expert, Management Consulting, and Advisory services related to intellectual property (IP) and other intangible assets; corporate accounting investigations; regulatory and reporting obligations; solvency and restructuring; and contractual or competition disputes.

Practice offerings address economic damage calculations and testimony; accounting investigations and financial forensics; technology and intangible asset valuation; strategy and risk management consulting; mergers and acquisitions; debt and equity private placement; and IP brokerage.

Subsidiaries of Ocean Tomo include Ocean Tomo Investments Group, LLC, a registered broker dealer. Ocean Tomo is a part of J.S. Held. With more than 100 offices globally, J.S. Held assists clients – corporations, insurers, law firms, governments, and institutional investors – on complex technical, scientific, and financial matters across all assets and value at risk.

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## About J.S. Held

J.S. Held is a specialized global consulting firm whose professionals serve as trusted, expert advisors to organizations facing high-stakes events that demand urgent attention, exceptional knowledge, staunch integrity, and clear-cut analysis and advice. The firm provides a comprehensive suite of technical, scientific, financial, and technology advisory services that enable clients across the spectrum of industries to navigate complex, contentious, and often catastrophic situations with precise analysis, reliable insights, and confidence.

In 2022, Ocean Tomo joined J.S. Held, continuing the strategic growth of the firm. Leveraging the J.S. Held team of more than 1,500 professionals around the world, our clients will now have access to J.S. Held's suite of specialized services, including:

- Construction Advisory Services
- Corporate Finance
- Economic Damages and Valuation Services
- Environmental, Health, and Safety Services
- Equipment Consulting
- Forensic Accounting
- Forensic Architecture and Engineering
- Global Investigations
- Property and Infrastructure Damage Consulting
- Surety Services

Headquartered in New York, J.S. Held has offices across the United States, Canada, Latin America, Europe, Asia Pacific, and the Middle East.

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