



# STRATEGIC DIGITAL MANAGEMENT OF A GLOBAL IP PORTFOLIO

MSA - The Safety Company | CASE STUDY



## PROJECT SUMMARY

### About MSA - The Safety Company

MSA - The Safety Company specializes in the manufacture of workplace safety and protection products. The company was founded in 1914 by two US Bureau of Mines engineers, who asked the renowned inventor Thomas Edison to develop a small, intrinsically safe battery-powered electric light for use in mines containing explosive gases and thereby provide a safer alternative to open flame miner's headlamps. Recently celebrating its centennial, the company is the industry leader in the fields of gas detection instruments, respiratory protection, head protection, and fall protection products. It maintains a global IP portfolio of more than 2,500 patents and trademarks.

### Software and Products Used

- FoundationIP
- Patent Renewals

### Partnership Goals

- Implement a sustainable file-free office environment
- Effectively centralize MSA's global IP portfolio
- Improve the alignment of MSA's IP portfolio with its core business goals
- Enhance collaboration and communication with outside IP counsel

### Key Benefits

- Better understanding and management of MSA's global IP portfolio - able to identify and remove non-performing, and under performing patent families from its portfolio reducing maintenance costs by 30%
- Detailed global invention disclosure process
- Improved visibility into patent portfolio
- Enhanced decision-making on patent renewals

## THE CHALLENGE

When MSA – The Safety Company decided to centralize the management of the various IP portfolios of its global affiliates, Peter Rutkowski, MSA’s Global Intellectual Asset Manager, and James Uber, Global IP Counsel, knew they had to find a web-based, digital IP management system to replace the individual patent and trademark files located at MSA’s various design centers around the world. After comparing several competitive platforms, they selected FoundationIP primarily because the system’s electronic filing, storage, scaled cost structure and communication capabilities enabled them to centralize everything in one place. It was also accessible 24/7 from anywhere in the world. FoundationIP’s digital document management solution would not only enable MSA’s IP team to easily locate, access and store case files, it would also help improve communication and collaboration

## THE SOLUTION

### **Centralized web-based system improves communication and efficiency**

A key goal in switching to a web-based file system was to improve collaboration with outside IP counsel and to ensure the patents and trademarks within MSA’s core product categories accurately reflected the company’s business goals. Since FoundationIP is a web-based, hosted system, MSA’s IP team can communicate with its global network of IP attorneys via an integrated email platform that uses a unique case reference number to

automatically link all correspondence to the appropriate matter. Outside counsel can upload filed applications and docket using the same reference.

MSA also leverages FoundationIP’s Invention Disclosure Module to enhance its innovation process. With 300 engineers located at five international design centers in France, Germany, Brazil, China and the USA, ideas can be submitted with all documents, communications and responses to the inventions stored in one place within the system. MSA also utilizes custom field options to improve the management of key product lines. The ability to segment its portfolio into categories enables the company to easily review the age and status of patents, relate applications and cases to specific product lines, and to make more strategic renewals decisions.

Prior to using FoundationIP, MSA received upcoming renewals data from outside counsel in a simple spreadsheet. Each matter had to be manually reviewed in order to decide whether to maintain or abandon the patent across several jurisdictions. Today, using CPA Global’s patent renewals services in conjunction with FoundationIP, a simple report shows patents that are approaching the company’s predefined lifecycle, in addition to those that can safely be abandoned in response to competitor activity. As well as allowing MSA to send instructions to CPA Global to pay or abandon matters, the annuities interface also collects data inputs and loads them at one time, reducing administrative burden and risk.

## THE BENEFITS

### **Enhanced visibility facilitates informed renewals decisions**

#### **Centralized invention disclosure**

MSA customized FoundationIP's Invention Disclosure Module to streamline the submission and decision-making processes. Inventors can now easily submit invention disclosures for consideration. All emails and communication between engineers and IP reviewers are saved and easily accessible in FoundationIP.

#### **Robust search and storage capabilities**

Each case or matter stored within FoundationIP is assigned a unique reference number. This ensures all correspondence is automatically filed in the correct place. Even if a document is incorrectly coded, the unique reference number ensures it can be easily located and moved.

### **Increased scalability and productivity**

FoundationIP has enabled MSA to centralize its various IP portfolios without adding to headcount or internal resources. Prior to the implementation of FoundationIP and working within a paper file-based office, MSA's single in-house IP attorney was only able to manage a US based portfolio that was approximately half the size of the current IP portfolio.

## ABOUT CPA GLOBAL

CPA Global is the world's leading IP management and technology company, trusted by many of the world's respected corporations and law firms. Our integrated offering is underpinned by an outstanding global team of 2000 people.

Now we offer customers The IP Platform: delivering integrated Innovation and IP Portfolio software, services and insights across the entire Idea Lifecycle, supporting customers every step of the way to realize the value of their ideas.

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