



## IEEPI - Training Info file

### Certified Patent Valuation Analyst (CPVA)

#### Objectives :

- Valuation of Emerging Technologies
- Negotiating Licensing Agreements for Maximum Returns
- Advanced Patent Valuation
- Calculating Damages Resulting from Patent Infringement
- Best Practices for Monetizing Patent

#### Target audience :

- Intellectual property managers,
- Licensing managers,
- Technology transfer professionals,
- Patent examiners, Inventors,
- Patent lawyers,
- Patent agents,
- Financial analysts,
- Professional investors.

#### Specifications :

**Duration :** 16h

**Schedule :** Session 1: Remote | Session 2: Paris (FRANCE)

**Level :** Expertise

**Reference :** S03P003

#### Program :

#### Valuation of emerging technologies

- In depth review of valuation methodologies : Cost, Income, Market, Monte Carlo, Real Options, Reasonable Royalty, Probability Weighted Expected Return Methods, Bayesian Analysis, Binomial Lattices, Markov Chains.
- Introduction to the Patent Valuation Gauntlet (PVG) which takes into account commercial value, assertion value, blocking value, cross-licensing value, reputational value as well as patent invalidity risks and design around risks.
- Excel sheets with 40 valuation methodologies are included with the registration.

#### Negotiating licensing agreements for maximum returns

- How to maximize the value from your licensing agreements.
- When to use and how to negotiate the following licensing terms: Royalty rates, Upfront payments and milestones, Granting options to take a license, Royalty stacking, Sublicensing issues, Fields of use, Most favored nation licensing, Managing litigation, Royalty audits.
- Live sessions feature a Negotiating Battle™, with an interactive simulated licensing negotiation.

#### Advanced patent valuation

- Tremendous value can be gained (or squandered) through the drafting of patents. The value of a promising technology can be nullified through sloppy claims construction.
- Review best practices for: Balancing broad versus narrow claims/Getting the mix of independent and dependent claims right/Managing interactions with patent examiners/Selecting and defining the most appropriate terms/Managing the pace of patent review

#### Calculating damages resulting from patent infringement

- Numerous judicial rulings and the proliferation of non-practicing entities threatens patent value. On the other hand, the value of patents can surge when sustaining invalidity challenges.
- Review basic tenets of patent infringement such as:
  - Reasonable royalties





- Royalty bases
- Entire market value vs. Smallest Sellable Units
- Provisional patent damages
- Lost profits
- Price erosion
- Compulsory licensing
- Market spoilage
- Willfulness and Treble damages
- The Panduit Factors
- The Georgia-Pacific factors
- Cost of next best alternative
- Running royalties vs. lump-sum payments

## Best practices for monetizing patents – virtual summit

- This virtual summit event will take you through the gamut of options for optimizing the sale or licensing of your patents. Our expert panelists will:
  - Guide you in preparing your patents for monetization
  - Prepare you for negotiations
  - Provide detailed advice on working with patent brokers
  - Discuss what documents need to be prepared for each type of deal
  - Reveal the motivations of buyers and licensees
  - Assess patent value in exit strategies
  - Explore monetization via litigation finance and sale of royalty streams
  - Help you understand your post-sale obligations
  - Assess the merits of selling versus licensing
  - Explore patent pools and monetizing standard essential patents
  - Assess the critical issues in spinning out start-ups
  - Guide your deal term considerations

## Exam

- Once you have completed the required course credits and passed the online exam, you may use the CPVA designation after your name.

### Details:

## Requirements

None

## Assessment

- Quiz

## Statistics

Recommendation rate: 72% (years 2023-2025)

## Instructors

David Wanetick (Managing Director)

