DIAMS iQ

IP Management Software
by Dennemeyer

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MIGRATING IP MANAGEMENT SOFTWARE:
A PRACTICAL GUIDE

Enhance workflows – Protect data – Maintain IP

Tips and tricks on how to avoid common pitfalls and ensure a smooth software transition.

What it means to switch IP Management Software

Why is migrating to a new system so complex?

Your new IP Management Software is not only the future **home of your Intellectual Property (IP) database** but also your team's **virtual workspace** for their day-to-day routine. Especially in the IP sector, workflows can be complicated and involve multiple teams or even external parties.

Such an interconnected work structure means that organizations often seek out new software to **centralize and merge** their current patchwork of multiple tools. As IP portfolios expand, owners wish to reunite all their data and people in a single system to improve stakeholder communication, automate processes and increase operational efficiency. Preserving normal continuity while gathering and replacing all of these elements at once is a responsibility not to be taken lightly.

The major risks to avoid

Considering the broad scope of IP management, migrating to a new software system can be a lengthy process. During this handover, routine work must **remain uninterrupted** to respect due dates imposed by law and avoid **delays in filing or defense actions** that can directly impact business performance.

Besides staying on schedule, correct mapping of different data sources and using appropriate transfer methods are **key to avoiding inconsistencies** and even the loss of records. This also includes retaining any descriptive information, custom fields and the links between records, documents and other assets.

Hence, your **migration project needs the right experts** and adequate preparation to transfer all IP data and activities seamlessly to a new system. An in-depth investigation of your current workflow, comprehensive knowledge of your data structures, thorough planning and the onboarding of all stakeholders are essential for the success of your project.

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# How we ensure smooth transitions to DIAMS iQ

Leveraging our team's versatile areas of expertise

At Dennemeyer, our implementation and software consulting team's mission is to help our customers accomplish the switch to DIAMS iQ. With tech-savvy software and data experts as well as consultants with hands-on experience in IP management, complementing skillsets ensure all client needs can be addressed. Our team has supported numerous law firms, corporations and universities from various industries and source systems in the move to their new DIAMS iQ environment.

The team's wide-ranging technical and industry backgrounds afford them a comprehensive understanding of clients' processes.

Then, as part of the "implementation scoping" procedure, the team performs an analysis to identify optimization potentials within DIAMS iQ to deliver the best possible customer experience. This expertise in conducting audits is gained by running similar projects throughout the year across the globe.

The key to success is involving the right talent at the right moment.
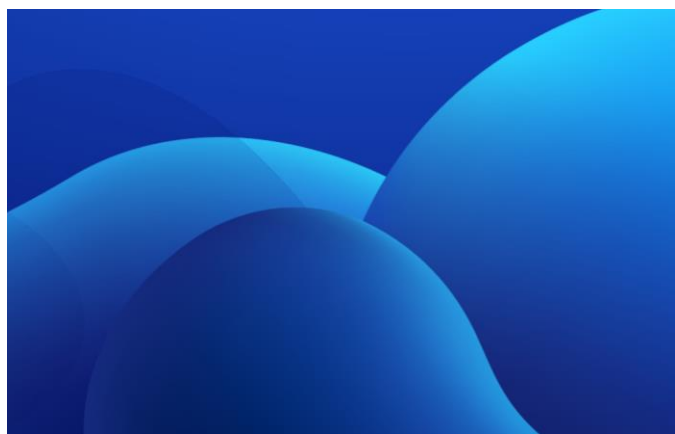
Acknowledging the individuality of each project

Every IP Management Software installation is different. Though the core features remain the same, there are significant distinctions in the set-ups required by R&D departments, trademark or design organizations and even law firms.

On top of this, the individual workflows, external partner networks and daily routines of businesses vary widely no matter their sector.

Our wealth of practice allows us to evaluate quickly if DIAMS iQ fits a particular use case and enables us to scope the project even before contract closure, free of charge to the customer. Thanks to a detailed implementation study, there are no unexpected charges and the client profits from full cost transparency and pre-arranged fees. Last but not least, once the project starts, we hold regular test sessions and update meetings to exchange feedback.

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Preparation is everything – outline of a typical DIAMS iQ migration

Having carried out many successful migration projects, we have developed an adaptable strategy that ensures a smooth transition and accounts for your individual needs. When you collaborate with our experienced software experts and data engineers, we make sure the switch to your new software, DIAMS iQ, is the best it can be.

First contact
Opening conversations to understand your needs and expectations. We can provide you with additional material on our solutions and their features.

Analysis & quote
Together with your team, our software consultants run an in-depth analysis to identify how to tailor DIAMS iQ to fit your data structure and processes perfectly.

Configuration
Our implementation team configures DIAMS iQ, including all custom fields and templates. Regular follow-up meetings are scheduled.

Testing phase
Your project team gets access to a pre-production system and receive instruction on how to test DIAMS iQ. Once the configuration is approved, we schedule extensive trainings and the go-live date.
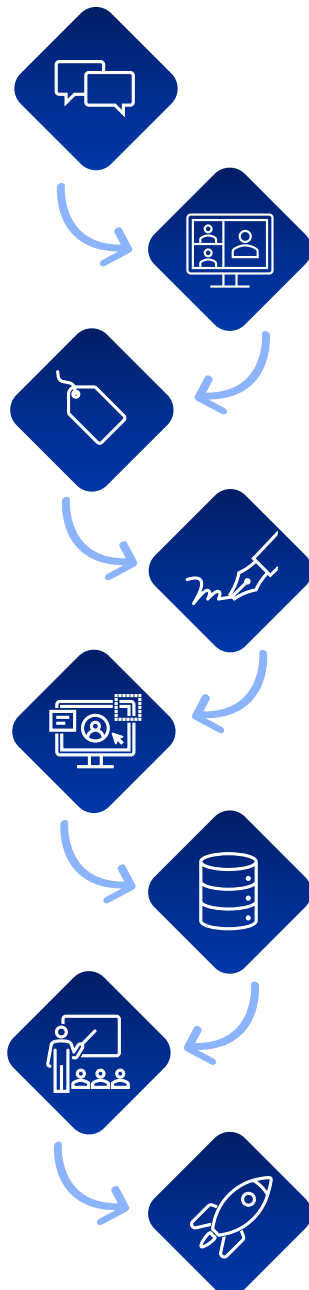
Product demonstration
You can experience DIAMS iQ during an online live demo with our software experts and learn about its features and customization options.

Agreement and planning
After contract closure, our team shares a detailed project plan and timeline, allowing you to prepare for the upcoming transition.

Initial data migration
Based on a test export, our engineers assess the existing data formats and quality before writing scripts to map your source information and field labels into DIAMS iQ's database structure.

First steps with DIAMS iQ
We run a final migration just before the go-live date to ensure DIAMS iQ has your latest data. Lastly, we accompany your team's first steps with detailed training sessions.

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What does the perfect transition task force look like?

The makeup of a DIAMS iQ migration project team

The user comes first

Your team is the most valuable source of information when it comes to detailing the must-haves for your new software. They know all business processes inside-out and have the best understanding of the external stakeholder network (clients, agents) they collaborate with daily. This is why we recommend you create an internal task force to gather intel about all business processes affected by your software migration project.

Translating IP-specific process needs into software

Our **software consultants** combine hands-on IP management experience with deep knowledge of all DIAMS iQ features and customization options. Their biggest contribution is their ability to translate business requirements into "DIAMS iQ language," even when a workflow uses a combination of multiple features. In this way, they assist you in analyzing your business's needs, putting forward the most suitable implementation options for DIAMS iQ.

Our software consultants also act as your contact for product demonstrations and training sessions. To maximize coverage and support, these professionals are located in different offices around the world and speak numerous languages: English, German, French, Japanese, Spanish, Italian and more.

Understanding the data behind it all

Our data engineers have extensive experience with migrating portfolio information from other systems to DIAMS iQ. Over time, this team has gathered valuable insights on the structures of other known software and how to assemble data from multiple sources (e.g., Excel, Access, SQL, custom databases, calendar tools, etc.) within the centralized DIAMS iQ system.

Our technical experts know every detail of DIAMS iQ's database structure closely and have a deep understanding of input format expectations, allowing them to import even large datasets efficiently and without issue.

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Project coordination and software configuration

A dependable, flexible implementation team is at the center of our service offering. On the one hand, these experts plan and coordinate the entire project, including effort and time estimations, resource planning and status updates for all stakeholders. And on the other, they oversee configuring and customizing DIAMS iQ to match your unique requirements. This includes creating custom fields, security configurations, templates and modules.

A third important responsibility of our implementation team is setting up and maintaining your DIAMS iQ server infrastructure, which includes arranging and executing system updates.

After-care and support

Our customers often nominate an internal DIAMS iQ administrator to manage user activity and serve as the main interface with DIAMS iQ's teams when there are questions or configuration requests. The DIAMS iQ administrator is usually the user with the most advanced knowledge about the software.

Once your new DIAMS iQ system goes live, we hand over your project to our support team, which you can contact anytime if you have any difficulties or wish to book additional training sessions.

We run multiple teams globally to ensure service availability during your office hours.

Software release management

Our product managers are in close contact with clients to gather feedback and plan improvements and innovations to advance our software.

With the release of new versions, we reach out to each customer individually to schedule an update appointment that suits their schedule. If desired, a "QA system" can be set up to allow your team to test and approve updates on a testing clone of your software. Each version comes with detailed step-by-step guides of all new features, while bigger releases have their own webinars where our software consultants explain and demonstrate new features.

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Learning from industry specialists

1 Plan sufficient time to train your team before going live with your new system to avoid latencies or interruptions of their work.

2 If you are merging the functions of multiple tools into one software, make sure the relevant specialists are informed and can anticipate when data exports will be completed.

3 Plan project checkpoints to review and approve progress. This will also help avoid falling back to a very early stage in the case of course corrections.

4 Examine your workflows to detect opportunities to simplify or even automate them. As you switch to the new system, it is an excellent time to apply these changes.

5 Do not let price be your primary decision driver. Take into account the fit of the product for your organization and where it can improve processes.

6 Consider the external partners your team collaborates with and notify them of possible changes in your operations.

7 Take advantage of the opportunity to clean your database. Are there fields or records you do not need anymore? Are your report, letter and email templates up to date?

8 Allocate enough time and resources to check the test installation (provided by default to all our clients) prior to going live.

9 Choose the right training method for each user: a train-the-trainer approach, individual face-to-face training, group learning, dedicated administrator instruction, etc.

10 Take part in Q&A sessions with your software consultants and take advantage of their experience from previous projects.

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About DIAMS iQ

Dennemeyer has been providing world-class IP services for over 60 years. Today, we deliver a comprehensive set of IP management services to customers from multiple industries all over the globe. Our IP software suite has expanded to meet our clients' needs for digitalization and automation and will continue to evolve to stay at the forefront of innovation.

Developed fully in-house, DIAMS iQ is our powerful IP Management Software that features native integration with our IP renewal services to provide fee forecasts and the ability to instruct renewals with a click. DIAMS iQ's numerous customization options make each installation a unique digital workspace that is perfectly adapted to the customer's situation.

Our IP Management Software comes with integrated assistance and process automation tools, reducing the time spent on administrative tasks while ensuring on-time task completion and the highest data accuracy. Other highlights include:

- Built-in country law engine, calculating 5,000+ due dates for 220 jurisdictions
- Bulk record creation and updates to do more at once
- Convenient linking of all IP-related information and documents on one system
- Secure digital workspace that enables 24/7 portfolio access and remote working
- Tools for collaboration, workflow automation and secure file exchange
- Dashboards and dynamic reporting tools

What customers say

"DIAMS iQ is a fantastic product. It provides an invaluable system to manage intellectual property practices and patent practices. It includes the key features requiring to manage and prosecute patents and also includes many advanced features to help process applications. After sales support is great and are extremely quick to correct any issues. DIAMS iQ is a very flexible system, and I would highly recommend this software."

Anthony Alder | Alder IP - Patent Attorneys and Solicitors

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www.dennemeyer.com/demo

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