

# TRADE SECRET & PROPRIETARY INFORMATION MANAGEMENT BEST PRACTICES

## *A Study of Trends, Strategies and Best Practices*

The Trade Secret & Proprietary Information Management Report is the most comprehensive operations practices benchmarking report of its kind. Use this report to:

- Help you craft trade secret policies and procedures that reduce risk of trade secret misappropriation and proprietary information leakage.
- Enable you to evaluate your protection practices and identify valuable improvement opportunities
- Provide benchmarks on your own trade secret and proprietary information handling relative to your peers
- Evaluate approaches used for controlling trade secrets and proprietary information conveyance (leakage), loss, and/or misappropriation.
- Assess training program that improve corporate personnel and stakeholders trade secret knowledge

## **The most comprehensive data on trade secret management practices**

*ipPerformance Group* has gathered policies and best practices from 33 IP driven companies. This is the most comprehensive proprietary analysis for trade secret and proprietary information protection practices ever collected. Be confident using our guide as the definitive source of benchmarking and best practices data.

## **Benchmark your company's trade secret & proprietary information practices**

Benchmark your company's trade secret & proprietary information management and protection practices vs. other companies of comparable size and profile in terms of:

- Function(s) responsible for trade secrets
- Auditing polices & practices
- Methods for identifying, capturing and classifying
- Training program & methods
- Use of formal processes
- Trade secret management and access to trade secrets
- Employee communications & interviewing
- Executive competency and communication
- Risk assessment procedures

### **Benchmark Report at a Glance**

#### **Sample Participants**

Freescale Semiconductor  
Owens Corning  
NOVA Chemicals  
Clorox  
Dow Corning  
Oclaro  
Praxair  
Celanese  
IBM Corp  
Swagelok

#### **Number of Companies**

33 Companies  
22 Major Industries

#### **Information Type**

Graphics  
Metrics/Ratios  
Key Findings  
Recommendations

#### **Report**

Every report includes  
Two-Volumes  
Digital PDF Version  
127 pages

1 hour of analyst time to answer any questions about the report and help you use it effectively

#### **Contact Information**

*ipPerformance Group, Inc.*

630.216.9673

[www.ipperform.com](http://www.ipperform.com)

### Learn how company practices vary by:

- Company annual revenue
- Management & Ownership (IP Legal vs. Technology)
- Industry
- Misappropriation Incidence - Expected to increase
- Misappropriation Incidence - Experience
- When formal processes are in place for the identification and classification of trade secrets
- Audit practices
- Losses suffered from the trade secret misappropriation by trusted insiders
- Losses suffered from the trade secret misappropriation by espionage

## Report Structure and Organization

### Table of Contents - Summary

- Executive Summary
- Highlights
- Management Guidance & Recommendations
- Background & Main Findings

### Table of Contents - Analysis Book

- About You and Your Company
- Program Background
- Types of Proprietary Information Company Identify and Manage
- Trade Secret Responsibility
- Trade Secret Audits
- No Audit
- Identification and Classification Processes
- Policies & Processes
- America Invents Act
- Training
- Misappropriation & Loss Incidents
- Cybercrime & APT (advanced persistent threats)
- Executive Support
- Employee Communication
- Software Tools
- Trade Secret Management & Tracking
- Business & Organizational Data

### Analysis Sections with Filtered Results

Section 1: Detail Results - All Companies

Section 2: Detail Results - Companies Segmented by Annual Revenue

Section 2.1: Detail Results Filtered - Less Than 500 million

Section 2.2: Detail Results Filtered – Between \$500 million - \$5 billion

Section 2.3: Detail Results Filtered - Greater Than \$5 billion

Section 3: Elaborations and Noteworthy Comments

Section 4: Companies with Trade Secret Misappropriation Losses

### **Who Can Benefit From This Report**

- Chief Intellectual Property/Patent Officers
- Chief Legal Officers/General Counsel
- Chief Financial Officers
- Chief Technology Officers
- Human Resource Management
- Research and Development Management

### Contact Information

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## More on ipPerformance Group

ipPerformance Group, Inc. ([www.ipperform.com](http://www.ipperform.com)) is the leading Intellectual Property Advisory, enabling companies to apply best practices and measure performance. Drawing on the knowledge of over 550 intellectual property management benchmarks of IP-driven companies, we help our clients solve complex intellectual property business problems and measurably enhance their ability to build value, manage risk and improve performance in an intellectual property–driven world. The following description outlines some of our other offerings.

### **Custom Analyses**

While benchmarking the peer and internal information, it essential to look at the context of the data and understand factors that can influence a divergence in benchmark results. In addition to our benchmarking activities that enable us to evaluate best practices, we have developed a comprehensive capability maturity model that will allow you to get a true assessment of your program. For more information, please call Rob Williamson at 630-216-9673 ([rwilliamson@ipperform.com](mailto:rwilliamson@ipperform.com)).

### **Other Benchmark Reports and Best Practice Guides Available:**

- Strategic Intellectual Property Management–Comprehensive View of End-to- End Processes – Evaluating Program Proficiencies
- Patent Intelligence (Search and Analytics)–People, Process, Tools and Services
- Inventor Rewards and Recognition Program
- Developing IP Strategies and Performance Measures, Driving Business Results
- IP/Patent Department Operations & Metrics (Staffing Roles & Responsibilities, Internal & Outside Counsel Costs)
- Intellectual Property Training Best Practices
- Intellectual Property Management Guidelines–Standard Operating Procedures and Best Practice Templates
- Intellectual Property Technology Valuation Guidelines

### **Intellectual Property Management Diagnostic Review**

We are pleased to offer an Intellectual Property Asset Management “diagnostic review” which is a visit from our experienced consultants to give you a more detailed understanding of how your intellectual property program can achieve its objectives. We provide an in-depth review of your operation, identify issues or concerns, and spend the day discussing best practices and improvement opportunities.

### **Intellectual Property Management Performance Metrics Development**

We can help you develop a measurement program tailored to your unique organizational needs. These programs generally encompass both qualitative and quantitative metrics. We translate and adapt corporate-wide performance measures to the unique characteristics of the intellectual property operation environment.

### **Intellectual Property “Best-In-Class” Management Reports and Proficiency Indicators**

ipPerformance Group has developed analysis for reports that capture key management information to support both practicing attorneys in their oversight of day-to-day matters and IP law department leaders in their broader role in setting the department’s strategic direction. With this kind of information readily available, intellectual property leaders are better able to communicate in business terms that are meaningful to senior management.

## ipPerformance Group

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