Protecting Your Company’s Intellectual Property

Presented by Paula R. Stern
WritePoint Ltd.
About Me (I hate this slide)

- Senior Tech Writer/Blogger/
- Founder and CEO of WritePoint Ltd. since 1995
- Lead Instructor since 1999
- 10-15 employees
- tekom Israel founder and President 2017
- Lectured at conferences in India, Germany, Ireland, UK, Israel, US...
- MEGAComm Conference Coordinator
Defining Intellectual Property

Intellectual property - Classic Definition
- includes such concepts and rights as copyright, trademarks, industrial design rights, and patents.

Intellectual property - Our Working Definition
- Includes “back office” workflow, documentation collaterals, tips and best practices, publishing issues, known bugs, contacts and expertise, etc.
Defining the Problem

- Classic Definition
  - Getting patents
  - Prosecuting theft - legal issue
- Our working issue
  - Non-traditional IP
  - Preemptive protection
    - People-related
    - Assets-related
    - Method-related
Defining the Problem

► People Issues
  ► Employees / Contractors leave
  ► Employees are promoted
  ► Employees are reassigned
  ► Contractors leave
Examples of what happens when you don’t protect your intellectual property?
Worked at a large company...

- When I left, my position was not being filled, so they asked me to teach different team members about different aspects of what I had done. The result was that no one person had a clear understanding of the work that I did, and I was still receiving confused calls from those poor team members, as much as 4 years after I left.
Why was this happening?

- Nothing was written/documentated
- No one person took responsibility for her knowledge
- In dividing the knowledge, no clear “chain of knowledge” was created
We worked in an Agile development cycle and released an average of 10 updated documents each time. As a freelancer who had worked with the company for many years, I was surprised when they told me they’d hired a full time writer (I worked 3 days per week). Within a week, the new writer was in and I was out. Then I started getting emails asking me for help - where were the documents, why wasn’t the generated help correct, etc.
Why was this happening?

- Company didn’t think in advance what assets the contractor was taking with her.
- New tech writer didn’t have a transition period.
- Contractor wasn’t asked to do a “brain dump”
Assets and Methods Issues

What’s Left Behind?

- Final version of the documents
- Source files *(hopefully)*
- Graphics files
- Outline (maybe)
- Some emails (maybe)

What’s NOT Left Behind?

- Experience
- Working relationships
  - Who solves what?
  - Who understands document issues?
- Other issues
- Non-Customer-Facing Deliverables
What’s NOT Left Behind?

- Non-Customer-Facing Deliverables (NCFD? No, not really)
  - Records of problems solved
  - Earlier drafts
  - Methodology / Processes
  - Which experts solved the issues? How?
  - Unpublished elements
- What can be done to save the NCFDs?
If you’re asking now…it might already be too late

The time to start was yesterday...

► What are you doing to protect your company’s intellectual property?
► Knowledge of current employees?
► Experience? Expertise?
► Is it even possible?
Can you save “Experience”?

- Simple answer is “No”
- More complex answer:
  - Tested and proven working methods
  - Existing drafts
  - Connections
Can you save the working relationships?

- Simple answer is “No”
- More complex answer
  - Build your relationships across teams/department
  - Distribute/rotate “additional”/add-on tech writing jobs
  - Avoid having lone experts by having them teach others
Can you save workflows/methodology?

- Absolutely!
  - Document the Methodology
    - Save contacts in shared repository
    - Complete list of all documents required per release
    - Complete list of What’s New per version
    - Plan roadmap for documentation
  - Maintain an up-to-date style guide
Document the Methodology/Process

- Example: What is the translation process?
  - What agencies/translators have you evaluated?
  - What needs to be done before/during/after translation cycle?
Maintain Up-To-Date Style Guide

► In addition to the usual...go above and beyond
  ► Document team dynamics (roles, requirements)
    ► Template person - what macros are there? What templates?
  ► Styles - process for approving additions?
  ► What documents are released per product?
  ► What is the publishing workflow?
  ► Rotate responsibilities
    ► Editor
    ► Help author/compiler
Basic Requirements - Style Guide

- Detail process for publishing
  - Example: RH > Customized output
  - Example: CYREN white labeled and branded
Non-customer-facing deliverables?

- Current and planned product capabilities and limitations
- Recorded training sessions
- Knowledge Base article - internal and external
- Sales/marketing roadmaps
- Forecasts (costs, feature releases, etc.)
- Internal guidelines and policies
Non-customer-facing deliverables?

- Record of Problems Solved?
- Minutes of meetings
- Early drafts
  - Easy to save but helpful? Probably not - unless tagged carefully
Promote a Corporate Culture That Supports Knowledge Transfer

- Continual learning
- Culture of Support
- “Pinch” hitters for all crises (share knowledge, training)
- Create checklists
Create Repository of Valuable Assets

- SharePoint or something similar
- All source files
- Style Guide detailing methodology
- Detailed guide to deliverables and workflows
Consider Tracking Software

- JIRA (or similar)
- Tracks
  - All document status
  - Outstanding tasks
  - Problems and how they were resolved
  - Status of current documents
Finally...before anyone leaves... think... BRAIN DUMP
Your opinion is important to us! Please tell us what you thought of the lecture. We look forward to your feedback via smartphone or tablet under

http://im04.honestly.de

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Feel free to contact me:
Paula R. Stern, WritePoint Ltd.
paula@writepoint.com

THANK YOU!

The feedback tool will be available even after the conference!