

# CASE STUDY

## Patent Search & Reporting



## THE CHALLENGE

A global leader in professional patent-related support was faced with two looming demands:

1. Scale their research and reporting capabilities so that they could meet the demands of a growing customer base and,
2. Incorporate a new joint classification system, Cooperative Patent Classification (CPC), into their business process.

The company needed a system that would store key aspects of all of their patent research projects and produce a final report using a standard template. A key requirement of the patent research process is to quickly search across all of the standard patent classification systems (US, ECLA, and IPC) and return the results in a specified format. With the deadline approaching for the implementation of the CPC standard, the company needed to quickly incorporate this new set of data into their search and reporting process.

## THE SOLUTION

Because the CPC deadline was rapidly approaching, the patent company needed an initial release of a tool that allowed them to search and format the CPC patent data. CC Pace uses an Agile methodology that involves completing a series of rapid development cycles to deliver small increments of functionality piece-by-piece, rather than delivering a complete system all at once. This approach allowed CC Pace to deliver the first stage of the product so that the company could quickly realize business value.

Subsequent iterations focused on the other aspects of the patent research process, including Rich Text entry of data and the automated creation of a formatted Word report. Using an iterative approach, the company was able to continually monitor the project's budget against developing feature sets and prioritize those that delivered the greatest business value soonest.

## THE RESULT

Frequent collaboration between the business users and CC Pace's technical team allowed the patent search company to drive the priorities and shape an adaptive reporting system. Using the iterative Agile process, the patent search company identified the highest priority functionality for development that would best allow them to serve their clients. This process allowed them to see an updated system every week for review and acceptance. As a result, they were able to search classifications ahead of the CPC deadline, with the rest of the functionality added immediately after.

## ABOUT CC PACE

CC Pace is a 40 year old IT consultancy, and recognized thought leader in Agile software development, Lean-Agile process improvement and Lean-Agile project management. CC Pace has been using Agile software development techniques since 1999, on projects for our clients, from start-ups to Fortune 100 firms. We are often called in to assist firms that have specific client-driven needs, in order to ensure that they get the highest priority business value delivered to them early. This in turn allows them to better serve their clients, maintaining a competitive edge, and producing earlier returns on their IT investment.