ANAQUA®

A New Way of Working: Adopting AI into IP Processes

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ABOUT THE AUTHOR

Introduction

I have spent the last couple of decades focused on how technology can transform the IP industry – as an entrepreneur, investor, corporate executive and technology enthusiast. I am convinced that artificial intelligence (AI) offers unprecedented potential to positively impact the daily lives of IP professionals and provide them with professional growth opportunities.

For law firms and corporations, the process of change can be daunting. The IP leaders I speak with are at very different stages of their AI journey. Some are moving quickly, embedding AI across the IP lifecycle. Others are just beginning, experimenting with targeted solutions to solve specific problems. Both are valid starting points. But what matters most is having a clear direction and a focus on real outcomes. This eBook provides practical guidance and actionable tips to start and scale your AI journey. It's grounded in two beliefs we hold at Anaqua.

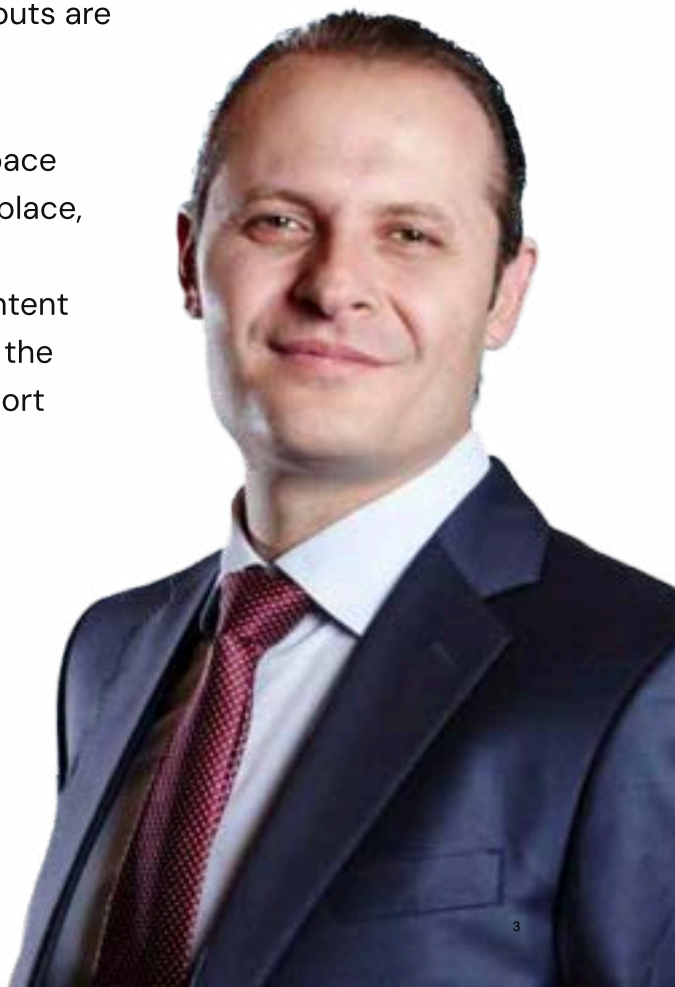
First, technology should be deployed to add value and solve business challenges, not because it is the most talked about technology. It must deliver substance over hype. Second, AI should strengthen the role of IP professionals, not diminish it. AI needs IP experts more than ever to ensure its outputs are plausible and effectively managed.

AI is not a destination, and there is no single "right" pace of adoption. Every IP team will start from a different place, shaped by its data, processes, risk tolerance, and priorities. The most important thing is to start with intent — to be clear about the problems you want to solve, the outcomes you want to achieve, and how AI can support your team's current and future work.

We hope this guide supports you wherever you are on your AI journey, and we look forward to learning from your experience.

Toni Nijm

Chief Product Officer, Anaqua



SECTION 1

A New Way Of Working with AI

Why AI Is Forcing a Rethink of How We Work

The IP industry is inherently highly risk averse. Mistakes cost millions and IP professionals need to be comfortable that process change is managed, adds value and has been fully risk assessed. AI adoption needs to be considered within these parameters, delivering insight that humans can verify.

What's becoming increasingly clear is this: ***AI isn't just another tool we're adding to the technology stack. It's changing how IP work gets done.***

For years, technology solutions developed for IP have focused on digitizing existing processes. AI changes that equation. It forces us to step back and ask harder questions about workflows, roles, and areas where human expertise truly adds value. This shift isn't just about faster systems; it's about shifting towards a smarter way of working.

AI Handles the Work. IP Professional Shape the Outcome.

IP teams of the future won't 'use' AI. It will be embedded into their workflows and run quietly in the background, assisting with all kinds of everyday tasks. Visible changes won't be more dashboards or features. Rather, it will be evident in how little time teams spend on administration and how much more time they spend on strategy.

From Task Execution to Decision Making

With AI working in the background, IP teams will dramatically reduce the time spent on repetitive tasks like filing, data entry, and manual administration. Reporting cycles will become faster and more reliable.

The AI-enabled IP team of the future will spend less time doing and more time checking, analyzing, interpreting, and combining IP assets to drive real competitive advantage.

AI as the Engine Behind Smarter Innovation

Within the next decade, corporations will be using AI to transform and manage the entire innovation process. AI will listen to meetings, read documents and emails and combine this information with historical IP data to flag potential inventions. This shift will enable IP teams to capture more ideas faster and with greater accuracy.

AI will help IP teams better understand how to combine different IP assets into new ideas and deliver effective monetization strategy for innovation.

The IP Team of the Future: AI in the Background, People in the Lead

Capability Area	What This Enables
AI-Driven Administration	• Admin work handled by AI; IP staff validating • Incoming correspondence automatically recognized from the inbox • Case matching without manual search
Instant Insight & Collaboration	• Lightning-fast insight and reporting • Fast, frictionless global collaboration across teams and regions
Faster Filings	• Filings created for review in seconds • First draft applications generated directly from data
Real Time Research	• Continuous, relevant research surfaced in real time • AI-assisted prior art searching
Data Driven Decision-making	• Instant insight from IP data • Clear ROI visibility at the individual IP asset and portfolio level • Reports generated automatically
Patent Office Integration	• Direct integration with Patent Offices • Automated delivery of filings and communications globally

SECTION 2

Building a Practical Roadmap for AI Adoption

Creating a roadmap for AI adoption can be daunting. But getting started does not require a five-year plan or an organization-wide strategy.

Some organizations will understandably want to drive a 'top down' strategy for AI adoption. Many Chief Innovation Officers or Chief IP Officers are already seeking to drive AI adoption because they can see the potential to increase efficiencies. But AI adoption does not necessarily need to come with an end-to-end plan across that encompasses the entire IP lifecycle.

Many organizations prefer to start by finding a single point of friction, testing a solution and demonstrating value before moving on to the next challenge.

And, of course, most organizations are already applying AI to routine tasks – whether they see it as AI or not. Call transcription, optical character recognition (OCR) and translation services are all good examples of corporate AI adoption. These applications are not specific to the IP industry but are simple to adopt, save time and reduce tedious manual tasks.

These are examples of specific IP tasks where AI can improve efficiency and insight:

- Incoming correspondence classification & management
- Summarizing actions & communications
- Auto-filing & document management
- Extracting data into structured fields
- Generating task lists & actions
- Creating reporting tools & analytics

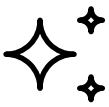
Four Questions to Help Guide AI Adoption in IP

When organizations are looking at IP specific AI applications, below are four issues to consider.



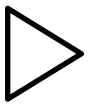
Start with the Business Problem

- What are we trying to achieve?
- Where could we be more efficient?
- Which issues are we trying to solve?
- Where are we losing time or creating risk in our IP operations?



Is AI the Right Tool?

- Does this challenge involve large volumes of data or complex information?
- Would AI meaningfully improve speed, accuracy, or insight?
- Is there a simpler solution that doesn't require AI?



Assess Our Readiness

- Is our IP data clean, structured, and consistently classified?
- Are workflows documented and followed consistently across teams?
- Do we have clear ownership and governance of IP data access?
- Is there leadership commitment for AI adoption at the executive level?



Identify Quick Wins

- Where does our IP team feel the most friction today?
- Which tasks consume the most time or introduce the most risk?
- Where could AI deliver immediate efficiency or insight?
- Which use cases would show value quickly?

Questions to Ask Your Team When Considering AI Deployment

These are additional questions to discuss with your team when you are getting started on a new AI deployment.



People

- Who owns AI adoption in our organization?
- Do we have the right internal expertise?
- Do we have a trusted partner who understands the IP domain?
- How do we reassure that AI is here to support, not replace, their role?



Strategy & Roadmap

- What are our most challenging IP issues today?
- Are we looking to drive efficiency, reduce cost, improve reporting, manage data better—or all of the above?
- Which outcomes matter most, and in what order?



Data

- Is our IP data accessible, structured, and governed correctly?
- Where is our data stored?
- Is it centralized on a single platform or spread across systems?



Security

- What is our policy on the use of generative AI tools?
- Do we have zero data retention agreements in place with AI vendors?
- Do our partners have AI governance certifications—or are they actively working toward them?

SECTION 3

Common Challenges in AI Adoption; Pitfalls to Avoid

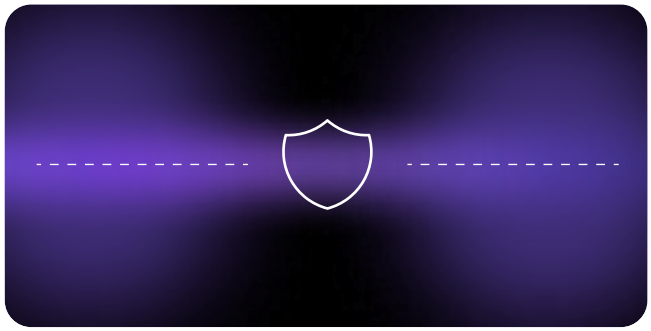
A common pitfall in AI adoption is assuming it has to be an 'all-or-nothing' transformation. Organizations may feel that a business-wide AI plan is required and this – in turn – can lead to delay, driven by the scale of such a project, or the fear of getting things wrong.

The pace of change in AI has been so fast that – by the time a strategy overhaul has been completed - it may be entirely out of date anyway.

It is possible to start small. The most important thing for IP teams is to start now – and not to be scared to test and try things out, within a managed and risk-free environment. By better understanding what AI can achieve, IP professionals can more clearly see the potential across the entire IP lifecycle.

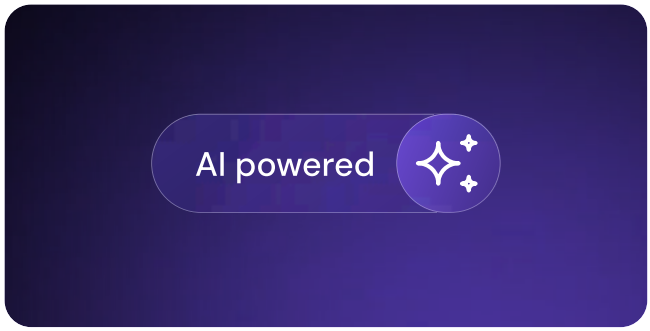


Other challenges that need to be considered include:



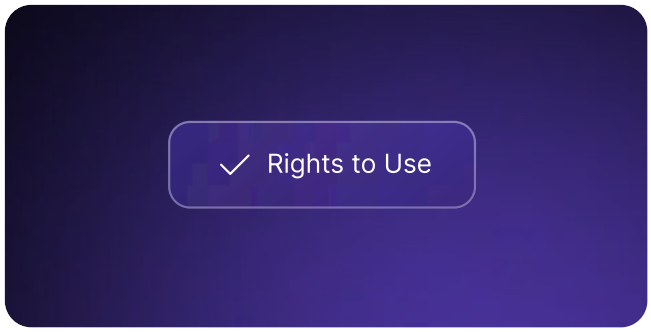
Security & governance

Companies need to ensure they operate with third parties that do not train AI on clients' data and have zero data retention policies. The **ISO/IEC 42001** standard for AI Management Systems (AIMS) is an emerging industry standard by which third parties can be audited.



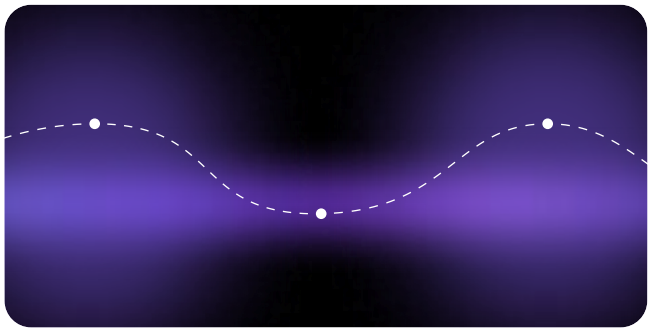
Over-reliance on AI without human oversight

As trust in AI grows, there is a tendency to check it less. Reputable AI deployment will address this and ensure people remain the last line of defence. The principle of professional-in-the-loop validation should be non-negotiable to ensure accuracy.



Management of AI use

As employees increasingly use AI within their own lives, companies need to ensure unauthorised use of AI does not creep into business. Approved tools and controlled environments help avoid employees 'bringing their own AI' to work.



Poor data quality and categorization

This condition can undermine result accuracy and seed scepticism about the effectiveness of AI. Teams need to ensure workflow automation is consistent to achieve consistent results.

The ISO/IEC 42001 Standard for AI Management Systems (AIMS)

Area	What the Standard Covers
Purpose	Defines requirements for establishing, implementing, maintaining, and continually improving an AI Management System (AIMS) within an organization
What It Demonstrates	That AI systems are developed, deployed, and used responsibly across the organization
Key Focus Areas	Risk management, ethics, transparency, and regulatory compliance
Lifecycle Coverage	Governance of AI across its full lifecycle, including data usage, model training, and ongoing operation

Key elements of ISO/IEC 42001 standard

AIMS Framework:
Establishes policies, objectives, and processes for responsible AI management

Risk Management:
Focuses on identifying and addressing AI-specific risks, including bias, safety, and reliability.

Transparency & Ethics:
Promotes fairness, accountability, and the ability to explain AI decisions.

Contextual Understanding:
Requires organizations to define the scope of their AI systems and consider internal / external issues.

Documentation:
Emphasizes keeping records to demonstrate commitment to continuous improvement

SECTION 4

Planning for Scale

Having achieved some low-risk, high-volume wins through AI adoption, how can your organization scale up? And how can your organization identify the most significant opportunities?

AI adoption can be seen across two spheres:



A more efficient 'business as usual'

Automating administrative tasks so they are accurately achieved in less time. Every business will be adopting AI driven applications to increase the speed and reliability of functional tasks. Those that do not, or are slow to adopt, will lose competitive advantage.



Transformational AI

Transformational AI comes from the re-engineering of processes and/or the automation of cross-team workflows to deliver step change. This requires more organizational investment, and a more structured approach.

IP teams will typically look to both areas for improvement, initially deploying AI to improve current administrative tasks. This helps teams better understand the potential for transformation that comes with scale.

Questions to Ask Your Team When Considering AI Deployment

These are additional questions to discuss with your team when you are getting started on a new AI deployment.

Planning for Success

0–3 months

Build the foundation

- Identify your goals and problems you are trying to solve
- Establish who will lead the initiative
- Clean and structure IP data
- Establish security, access controls, and audit trails

Fast wins

3–6 months

Demonstrate early value

- AI-driven summarization and drafting
- AI-assisted classification and triage
- Search and retrieval across the portfolio
- Improved reporting and visibility

Workflow Automation

6–12 months

Reduce operational friction at scale

- Automatic case matching
- Event suggestions and task generation
- Exception handling workflows
- Routing for review and approvals

Predictive & Strategic Transformation

12+ months

Enable smarter decision-making

- Forecasting cost and workload
- Risk scoring across portfolios
- Portfolio optimization
- Strategic decision support

CASE STUDY

Scaling AI in Practice: Lessons from Anaqua's Own Journey

"At Anaqua, we began by meeting with key operational teams, including Sales, Marketing, Client Success, HR, and Operations, spending time with each group's leaders to understand their processes and identify opportunities to improve efficiency through automation.

We were particularly looking for lower-value work that we could automate, with human oversight, freeing up more of people's time to do more higher-value work. We identified several use cases and started there. That was stage one – the more efficient 'business as usual'.

However, the second stage was the most interesting. By talking to cross operational groups, we could identify inefficient handoffs that could be improved – such as two departments having to process the same information in different systems. This is where an agentic AI solution is transformational. We envision multitudes of agents talking to each other, doing those handoffs.

For example, when the Sales team hands off a new client to the Finance team, we might have an agent responsible for automatically entering the correct information into a new system. This is where the transformational stage comes in. It delivers increased revenues and/or reduced costs.

This staged approach — **from efficiency gains to cross-team transformation** — is one that IP teams could also consider adopting into their own context."

Erik Bailey

Chief Information Officer, Anaqua

SECTION 5

Scaling AI: Key Considerations

Focus on impact, not ambition

Identify where AI can deliver the greatest business value. Build a clear library of use cases and understand the impact each can have on efficiency, risk, or decision-making.

Look beyond silos

The most transformational opportunities often sit between teams. Pay close attention to how departments interact, share information, and hand work off to one another.

Scale with confidence

Start small and expand gradually as confidence grows. Add new use cases when they become relevant and proven.

Invest in responsible use

Train users to work confidently and responsibly with AI, so they get the most from the tools while maintaining trust and control.

Keep humans in the loop

Continuously monitor quality and outcomes. IP professionals should always validate AI outputs to ensure plausibility, accuracy, and credibility.

SECTION 6

The Future of AI-Enabled IP Management

The potential is demonstrable; the technology is ready; the tools are accessible; the only questions are where and when to begin.

There is no ideal blueprint for success or pace of adoption. This will vary from company to company, depending on current processes, data readiness, risk management and cost of change. However, there are key principles outlined in this e-book that can help companies ensure the best chance of success.



AI adoption needs to solve real issues

What are the key business challenges? Is AI a suitable technology to address these? Where can we make quick and significant strides?



Start at a comfortable pace

Take the time to understand the potential and embrace it in a safe and secure way. This helps IP professionals see the potential and empowers them in their role.



Scale effectively

By demonstrating early success, organizations are more likely to believe the AI journey is worthwhile. When scaling, consider how AI can not only make teams more effective but support cross team processes.

AI is disruption not destruction

Handled effectively, AI will empower IP teams to deliver more with less, not replace them. The roles will change but embracing this reality enables IP professionals to thrive.

Don't neglect security and governance

Consider the importance of these issues upfront to protect assets and ensure safe and effective deployments.

Choose partnerships carefully

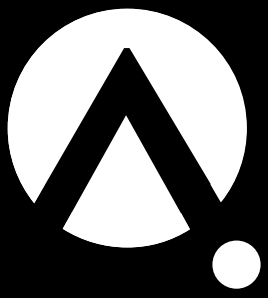
When evaluating partners on the AI journey consider their experience in your industry as well as their AI expertise. Seek reassurance over data protection and governance.

Finally, the role of the IP professional does not diminish in an AI-enabled IP team – it grows. Not only is it critical to keep humans in the loop - to ensure AI output is credible and plausible - but the replacement of administrative activities by AI can also help enable IP experts to evolve into a new and critical role: one that provides insight from IP data into creating and retaining the right portfolio to support the business.

The AI-empowered IP professionals of the future will be bringing better, more effective and more profitable innovation to market quicker. They will be advising on the investment required to achieve growth through innovation, and they will be even more central to the success of innovative business or law firm.

Read this blog by Justin Crotty, Anaqua's CEO, to learn more about key questions to ask when choosing an AI partner for IP and how Anaqua can help:

Built To Lead In The AI-Native Era Of IP



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