



Crowdsourcing your IP research

An informational eBook for those who regularly perform patent and IP related searches



The RWS crowdsourced model ensures the best results in the fastest time.

Clients work with RWS to create the requirements of the “study”, which is a generalized term for your search. The study also includes questions to determine whether individual RWS Researchers from our community are qualified (no conflicts of interest, etc.) to participate in the study. Eligible researchers then find and submit art (also called “references”), ranging from non-cited patents and non-patent literature to physical evidence and more.

Researchers from the RWS Community choose to participate because they are motivated by the “study reward.” The study reward is awarded only to the winning researcher who first provides the art that best matches the requirements of the study. Furthermore, the constraints of the study format incentivize the researchers to submit only the highest quality art and to do so as quickly as possible. Over the years, this model, and variations of it, have been applied to a wide variety of IP search use cases, which this document will cover.

The RWS Community

In crowdsourcing, a “crowd” is the large group of people who function individually, but contribute collectively, in finding information required of a study. They are problem solvers willing to invest their time because their education, experience or access to information give them an advantage in the search for a solution. The RWS Community works on study after study in their areas of expertise, producing measurable results over time, and that is why we refer to our specific crowd as a “community” of researchers.



The RWS Crowd

Industry	Community	Study Experts
Life Sciences and Pharma	19,312	208
Computer Technology	8,860	175
Electrical Engineering	7,148	207
Medicine and Dentistry	6,870	154
Chemistry	6,207	132
Biochemistry	6,156	104
Telecommunications	5,885	137
Computer Science	5,743	125
Physics	3,466	90
Computer Engineering	3,885	111
Electronics	3,338	116
Materials and Mining	2,606	84
Nanotechnology	2,386	74
Chemical Engineering	1,676	73

With RWS, we know who our researchers are. Each researcher provides to us detailed demographic data on interests, areas of expertise, education, work history, location, languages spoken and more. Researchers who volunteer this information and perform at the highest levels can qualify for private studies with greater opportunities for reward and sometimes guaranteed payment. We know who regularly participates, the quality of the work they perform and which types of studies they excel at, all of which allows us to place them on client projects to generate the best results.

With over 40,000 registered RWS Researchers, trends across the whole community tend to emerge. More than 40% of the Crowd hold post-graduate degrees. We track over 50 technology classes that individuals in our Crowd have experience in researching. For private studies, Crowd members can be selected by country, languages, technology class or specific work-related experience.



RWS Study Experts

A subset of the larger RWS Community are collectively known as “Study Experts”. RWS Study Experts are comprised of both subject matter experts (experts in their given field of practice/discipline) and research experts (experts particularly skilled in the art of research). Study Experts are qualified primarily by their performance on RWS studies, but also their work history, education and publications. The qualification of a researcher as a Study Expert is an honored distinction amongst our community given Study Experts qualify for more opportunities to earn rewards, including smaller, private and more focused studies, offering a greater opportunity for earnings. Study Experts are motivated to maintain high performance standards to remain as participants within the Study Expert program.



40,000+ RWS researchers



Researchers from more than 170 countries



83% of researchers hold bachelor's degrees



43% of researchers hold either master's or doctorate level degrees



760,000+ researcher submissions (all-time)

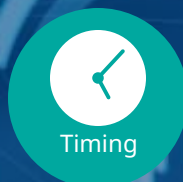
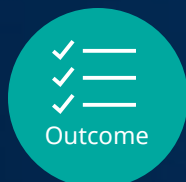


\$10 Million in rewards paid to researchers (all-time)

Our standard crowdsourced search models

Each of our crowdsourced search models positions our community of researchers to best serve your individual search needs.

Key deciding factors



CrowdSearch

Our most extensive and powerful search, employing the full resources of the RWS Community.

CrowdSearch studies offer the full power and diversity of the Crowd with direction from our professional Study Management team. CrowdSearch studies typically run 3-8 weeks and any Community Researcher may self-select to participate, including individuals from our pool of Study Experts, with reference checking performed on every study by our in-house analysts. For lower-risk matters, we offer smaller, private, 3-week studies featuring 10 handpicked researchers from our Study Expert subset of the Crowd who participate by invitation only.



Defend & Enforce

- › Litigation
- › Pre-litigation
- › Oppositions
- › Due diligence



Monetize

- › Enforce licenses
- › Survey & scouting
- › Licensing
- › Market gap analysis

ExpertSearch

Targeted recruitment of only the best performing researchers, tailored to your matter.

ExpertSearch studies are faster, private and lower-cost searches. ExpertSearch studies are performed by 2-4 handpicked Study Experts, by invitation only, selected for both their proficiency in performing searches and/or for their expertise in a given subject matter area; research and references are also supported by our in-house analysts.



Defend & Enforce

- › Litigation
- › Pre-litigation
- › Due diligence
- › Oppositions
- › Risk assessment
- › Inter partes review
- › Covered business method



Monetize

- › Licensing
- › Patent purchasing

Specialized crowdsourced searches

We also offer specialized crowdsearches that tailor to specific objectives such as monetization or locating physical products or prior art.



FlashSearch

FlashSearches focus on speed and efficiency, getting you well rounded search results in as little as 2 days.

FlashSearch studies are 2-day private studies with 10 hand-selected, invitation only, Study Experts, along with support and references provided by our in-house team.



Defend & Enforce

- › Novelty
- › Due diligence
- › Patentability



Monetize

- › State-of-the-art
- › Fast Landscaping



Evidence of Use (EoU)

Jumpstart or enhance your monetization program with the EoU you need to add value to your portfolio.

EoU is a means of identifying marketplace value, standard essential relevancy and potential infringement by mapping patent claims to products, product literature and/or standards. For monetization programs, our model is to cycle through client patents in batches between 10 and 40 a month. Crowdsourcing your EoU studies is a great way to quickly and effectively evaluate your entire portfolio for marketplace relevance.



Defend & Enforce

- › License enforcement
- › Due diligence



Monetize

- › Identify licensees
- › Portfolio valuation
- › Patent purchasing

Traditional search services

Searches performed by in-house professional research analysts

While the focus of this document is on crowdsourced research services, we also offer a host of world class search services performed by our in-house team of professional research analysts. Regardless of your need, RWS offers the highest quality search services at every price.

- › Validity searches
- › Novelty/patentability searches
- › Patent watch
- › Clearance searches
- › Landscape analysis/ State-of-the-Art
- › Design searches

Our Study Management team and process

How it works



Pre-launch

Our Study Management team works with the client to prepare the search requirements which will be relied upon by the Researchers; this is presented to the client via the Study Preview Page.



Launch

Upon written authorization we launch the study. The Study Manager ensures that recruited researchers are properly recruited and assigned to the study.



Live study

Researchers begin uploading their submissions in real time to our proprietary platform, AOP Connect. If more guidance is required, Researchers can be directed via platform alerts, emails and leads.



Study continues

Clients and our Study Management team review results and meet periodically to refine and adjust the direction of the research based on findings in near real-time, ensuring the researchers are on the right trail and finding useful art.



Review final results

Results are reviewed by our in-house analysts and then a final review is performed by the Study Manager, highlighting and bringing attention to the highest quality submissions. We don't wait until the end of the study to act on findings.



Study is closed

The client has a final meeting with the Study Manager to review the results and select the winning submission. Client has an opportunity to provide feedback.

Our Study Management team works with you throughout the course of your study, from start to finish, guiding you in the creation of the study requirements and qualifying the results as they come in. With years of experience managing crowd-based searches and understanding the talents of the RWS Community and our Study Experts, no team better understands the nuances of formulating and directing a search to get the best results.

Our Study Management team brings over 50 years of IP experience to each study. Their experience in specialty technology areas as well as research and study management is unparalleled in the industry. Our team includes:

- Attorneys and patent attorneys.
- Former USPTO Examiners.
- Advanced degree holders in both engineering and life sciences.
- The ability and experience of applying their skills and scientific understanding to a full scope of technologies.
- The ability to best manage and refine a search working closely with our clients/client attorneys and our community of researchers.

With over 4,800 studies completed, our experience with crowdsourcing IP research is unmatched and unparalleled. Access to our Study Management team is available at any point during the study, ensuring that your objectives are met and your concerns are addressed.





AOP Connect is our proprietary, web-based IP research platform for organizing, storing, reviewing and analyzing your prior art related to IP searches; it is also where you manage your crowdsourced RWS searches. With AOP Connect, you have all of your research in one, easy-to-access, centralized location, with the tools and capabilities to do what you need to do, when you want to do it.

Review current and past studies and references:

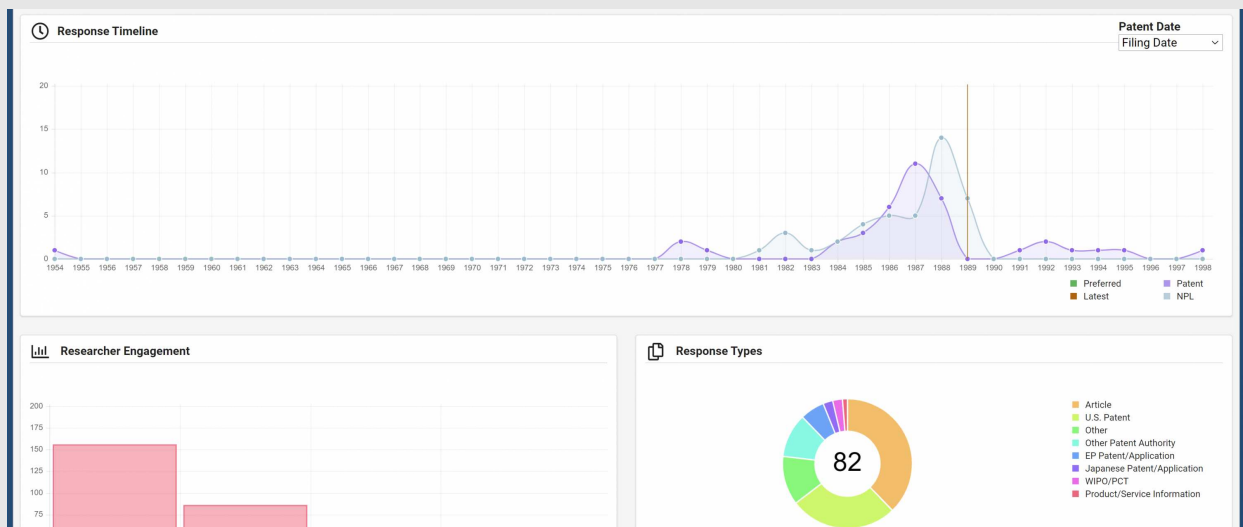
Study ID	RWS ID	Matter #	Title	Patent Number	Research Type	Completion Date
15041	202011-80042	X129897AB	New SWD Demo study - Smart Refrigerator		Freedom-to-Operate	2020-11-13
13910	202004-C0005		Public Service Covid-19 Project - Continuation		State Of The Art	2020-10-23
13769	202003-C0004		Public Service: Covid-19 Treatments and Vaccines		State Of The Art	2020-04-24
12795	201910-C0003		Site Specific Immunosuppressants (Demonstration)	US5540931	Validity	2019-11-18
12266	201907-C0036	2020-034	Cleaning Files in Mobile Terminals (Demonstration)	US10275355	Validity	2019-08-20
12049	fd122019		Flying Saucer (EoI Demo Study)	US3359678	Evidence Of Use	2019-06-07
11426	1611060Test		Smartphone cable and hook		Novelty	2018-03-23
11416	PO2018-1		Fire Resistant Lighting Unit for Light Emitting Diode Lamps		Validity	2018-09-13
8094			This is a test study		Private Crowd	2018-04-05
8060		AOP777	AOP - Enterprise private study		Private Crowd	2018-03-24

Showing 10 of 17 Studies - See All

Initech Study History
Total Studies 10 Total Responses 3823

Our AOP Connect Study Dashboard allows you to access all of your studies with RWS.

View real-time information related to your study:



RWS believes in full transparency for both the research and resources going into your study. Clients can view information on specific studies, including participation and submission data. From the Study Dashboard, you can view recent communications with the Study Management team, including scheduled calls, important notes, documents, study reports and more.



Sort, review, analyze and export your results:

The screenshot shows the AOP Connect interface with a navigation bar at the top. Below the navigation bar, there's a section for 'Study ID: 12049 | RWS ID: Flying Saucer (EoU Demo Study)'. A table lists various responses with columns for Id, Title, Tags, Comments, Reviewed, Featured, and Highlights. The table contains 10 rows of data, including titles like 'Planet Dog Orka Flyer and Zoom Flyer - Frisco Fetch - Kurgu Winga Discs' and 'The Physics of Frisbee'.

Id	Title	Tags	Comments	Reviewed	Featured	Highlights
717748	Planet Dog Orka Flyer and Zoom Flyer - Frisco Fetch - Kurgu Winga Discs			No (+1)	Yes	1 1.1 1.2 1.3 1.4
717747	The Physics of Frisbee			Yes	No	1 1.1 1.2 1.3 1.4
717743	Biomechanics of throwing a frisbee			Yes	No	1 1.1 1.2 1.3 1.4
717739	Kong Extreme Flyer, Kong Flyer, Kong Puppy Flyer, Kong Cruncheez Flyer	Kong	Sheldon Cooper Maps well 2020-04-16	Yes (+1)	Yes	1 1.1 1.2 1.3 1.4
717687	Aerodynamic performance of flying discs			Yes	No	1 1.1 1.2 1.3 1.4
717684	BIOMECHANICAL ASPECTS OF THROWING A FRISBEE: A REVIEW			Yes	No	1 1.1 1.2 1.3 1.4
717679	Identification of Frisbee aerodynamic coefficients using flight data			Yes	No	1 1.1 1.2 1.3 1.4
717649	The 1968 Remco Catalog			Yes (+1)	Yes	1 1.1 1.2 1.3 1.4
717631	Ultimate			Yes (+1)	Yes	1 1.1 1.2 1.3 1.4

With AOP Connect your responses are easy to view, easy to understand and easy to manage. Our filters allow you to sort your responses by numerous submission types, under both NPL and patent literature and you can even view the most recent submissions made since your last login. You can highlight, annotate, tag and even share information with team members. Your response lists are available for export to Excel and your original responses are available for download.

Full-text search and view your responses:

The screenshot shows the AOP Connect interface with a navigation bar at the top. Below the navigation bar, there's a section for 'Study ID: 12049'. The main content area displays a search result for 'ORKA FLYER' with a price of \$17.99. The result includes a product image of a dog holding a blue frisbee. To the right of the product image, there's a sidebar with 'Tags', 'Comments', and 'Research Requirements'. The 'Research Requirements' section lists two requirements: '1.1 a circular central portion (12) having a center surrounded by a substantially flat circular surface area whose boundary is defined by a predetermined radius;' and '1.2 a rim circumscribing the central portion (14);'.

Response Search and RWS Reader are features that allow you to keyword search across all document submissions and view, analyze and tag your results without ever leaving your browser.



Intelligently managing search risk

Protecting your privacy and any associated risk is paramount. We understand that not every detail of every matter can be shared with the public and we work with you to identify, gate, protect and limit, sensitive information.

Researchers

Researchers are bound by our formal Researcher Agreement. Researchers and clients are also anonymous to one another. Before participating in any study, Researchers must answer a list of pre-qualifying questions to determine whether they have any preexisting conflict of interests based on clients needs and desires.

- For the most sensitive of matters, private invitation-only studies are available where the study is never posted to the general public and the Researchers are recruited.
- Information for public studies can be hidden until a researcher is logged-in and/or qualifies for a study.
- Researcher names are anonymized by screen name and researcher communication with client, if any, is limited to client request.
- Researchers are only allowed to highlight relevant portions of their submissions; they are not permitted to editorialize or make comments.

Discoverability

Our search results are considered work product and are covered by attorney-client privilege; we do not provide legal strategy or advice. Our searches allow you to cast the widest search possible without incurring additional and unnecessary legal risk.

- In the case of crowdsourcing prior art, a party arguing for discovery would have to overcome the fact that there is nothing preventing them from performing research and discovering similar art and thus they would struggle to convince a judge to allow discovery.
- Researchers are not privy to purpose or strategy of the search and such details are limited and not publicized.
- We communicate individually with our Researchers via a private messaging system that cannot be accessed except by approved Researchers and our Study Management team.
- Researcher communications with clients are purposefully limited; Researchers are not permitted to opine or editorialize their submissions.

Security

Every page and file in the AOP Connect application has permissions checked before being served and password strength protocols are enforced for each account. Each step of the way, you may rest assured that your data is secure and protected.

- Network/software security provided through a combination of state-of-the-art hardware and system management practices.
- Documents are protected by Azure data management.
- External penetration testing is performed annually and includes internally developed applications.

Checklist:

Considerations for Crowdsourcing Your IP Research

- ☐ Is this a high-risk matter for either my budget or for my business?
- ☐ Do I need to cast the widest net possible, or do I need expertise?
- ☐ Are my goals related to enforcement and defence, or are they related to monetization and patent valuation?
- ☐ Is my current IP Research provider giving my search the attention it requires?
- ☐ Could I save money by doing a crowdsourced search first over a traditional search?
- ☐ Can my current search provider learn and adjust as the search progresses and discover information to influence the search in real-time?
- ☐ Is my current search/IP Research provider providing me with satisfactory results?
- ☐ Could I benefit from accessing all of my past search results in one place, accessible at any time from any internet access point?



IP Services without compromise.
Cut costs and save resources.
Simplify and streamline.

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