SDI ScienceDocs Inc.
Research • Funding • AI Strategy • Est. 2004

IP Landscape Snapshot

A practical worksheet for quickly summarizing intellectual property ownership, patent activity, freedom-to-operate questions, licensing status, and commercialization implications.

Purpose

Use this snapshot to organize early intellectual property information before deeper legal review, patent landscaping, licensing discussions, SBIR/STTR planning, investor diligence, university spinout formation, or strategic partnership conversations. This tool is not a legal opinion; it is a structured planning worksheet to identify what is known, what is uncertain, and what must be clarified next.

1. Technology / Opportunity Snapshot

Technology / Invention Name		**Prepared By**	
Organization / Lab / Company		**Date**	
Primary Application		**Development Stage**	☐ Concept ☐ Prototype ☐ Pilot ☐ Product
Commercialization Pathway	☐ License ☐ Spinout ☐ Product ☐ Service ☐ Partnership	**Target Market**	
Current IP Status	☐ Unknown ☐ Disclosure filed ☐ Provisional ☐ Non-provisional ☐ Issued patent ☐ Trade secret	**Ownership Context**	☐ University ☐ Company ☐ Joint ☐ Contractor ☐ Unknown
Known Inventors / Contributors		**Primary Contact**	
Snapshot Objective	☐ Internal planning ☐ TTO discussion ☐ Grant proposal ☐ Investor diligence ☐ Partner outreach	**Urgency**	☐ Low ☐ Medium ☐ High

2. IP Asset Inventory

Asset / Invention	Type	Owner(s)	Status / Filing No.	Key Dates	Jurisdiction	Notes
	☐ Patent ☐ Data ☐ Software ☐ Know-how ☐ Trademark					
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	☐ Patent ☐ Data ☐ Software ☐ Know-how ☐ Trademark					

3. Ownership and Rights Checklist

A. Ownership, Assignment, and Disclosure

Landscape Question / Item	Status	Evidence Source	Notes / Follow-Up
All inventors and meaningful technical contributors have been	☐ Yes ☐ No		

Landscape Question / Item	Status	Evidence Source	Notes / Follow-Up
identified.	☐ Unsure		
Invention disclosure status is known and documented.	☐ Yes ☐ No ☐ Unsure		
Employer, university, contractor, sponsor, collaborator, or grant-related ownership obligations have been reviewed.	☐ Yes ☐ No ☐ Unsure		
Inventor assignment, consulting agreements, visitor agreements, or contractor IP terms have been located.	☐ Yes ☐ No ☐ Unsure		
Any joint ownership, co-development, or background IP issues are documented.	☐ Yes ☐ No ☐ Unsure		
The team knows who has authority to approve licensing, option, spinout, or partnership discussions.	☐ Yes ☐ No ☐ Unsure		

B. Protection Strategy and Patent Activity

Landscape Question / Item	Status	Evidence Source	Notes / Follow-Up
Patent filing status, deadlines, and relevant priority dates are known.	☐ Yes ☐ No ☐ Unsure		
Public disclosures, abstracts, papers, posters, grant summaries, websites, or pitches have been screened for timing risk.	☐ Yes ☐ No ☐ Unsure		
Potential patent claims or protectable features have been summarized in practical business terms.	☐ Yes ☐ No ☐ Unsure		
Non-patent assets such as software, data, models, protocols, trade secrets, or know-how have been considered.	☐ Yes ☐ No ☐ Unsure		
The team understands what protection may be needed before major outreach, publication, fundraising, or partnership activity.	☐ Yes ☐ No ☐ Unsure		

4. Prior Art and Competitive IP Scan

Patent / Publication / Company	Owner / Assignee	Core Claim or Approach	Relevance to Our Technology	Risk Level	Follow-Up Needed
				☐ Low ☐ Med ☐ High	
				☐ Low ☐ Med ☐ High	
				☐ Low ☐ Med ☐ High	
				☐ Low ☐ Med ☐ High	
				☐ Low ☐ Med ☐ High	
				☐ Low ☐ Med ☐ High	

5. Freedom-to-Operate and Blocking Questions

C. FTO Screening Questions

Landscape Question / Item	Status	Evidence Source	Notes / Follow-Up
The team has identified products, companies, patents, or research groups that appear closest to the proposed use case.	☐ Yes ☐ No ☐ Unsure		
There are no obvious blocking patents or exclusive licenses known at this stage, or they have been flagged for review.	☐ Yes ☐ No ☐ Unsure		
Critical components, algorithms,	☐ Yes		

Landscape Question / Item	Status	Evidence Source	Notes / Follow-Up
materials, data sources, reagents, devices, or platform dependencies are documented.	☐ No ☐ Unsure		
Open-source software, third-party datasets, research tools, or licensed materials have been screened for usage restrictions.	☐ Yes ☐ No ☐ Unsure		
There is a preliminary plan for design-around, licensing, partnership, or legal review if risk is identified.	☐ Yes ☐ No ☐ Unsure		

6. Licensing and Commercialization Implications

Commercialization Issue	Current Understanding	Business Impact	Risk Level	Next Action
Licensing availability / exclusivity			☐ Low ☐ Med ☐ High	
Field-of-use restrictions			☐ Low ☐ Med ☐ High	
Royalty, option, or milestone expectations			☐ Low ☐ Med ☐ High	
Background IP needed			☐ Low ☐ Med ☐ High	
Partner or investor diligence concern			☐ Low ☐ Med ☐ High	

7. IP Position Summary

Area	Current Rating	Why This Rating?	Evidence / Missing Information
Ownership clarity	☐ Weak ☐ Moderate ☐ Strong		
Protection strength	☐ Weak ☐ Moderate ☐ Strong		
Competitive IP risk	☐ Low ☐ Medium ☐ High		
Commercialization readiness	☐ Early ☐ Developing ☐ Strong		

8. Key Assumptions and Unresolved Questions

Assumption / Question	Why It Matters	Evidence Needed	Owner	Target Date

9. 30-Day IP Follow-Up Plan

Priority	Action Item	Expected Output	Owner	Due Date
1				
2				
3				
4				
5				

10. Snapshot Decision

Recommended Next Step	☐ Proceed with commercialization planning ☐ Request TTO review ☐ Seek legal/IP review ☐ Conduct deeper patent landscape ☐ Pause until ownership is clarified
Primary IP Strength	
Primary IP Risk	
Most Important Follow-Up	
Decision Owner / Date	

ScienceDocs Support

Need help applying this tool? ScienceDocs supports commercialization, change management, AI adoption, grant strategy, technology transition, SBIR/STTR planning, and operational optimization. For IP-specific legal opinions, teams should consult qualified intellectual property counsel.