

# Background

TurboTax and doing taxes are synonymous. So, too, are small business accounting and QuickBooks. Intuit markets these and other well-known financial products and services to millions of customers worldwide. Intuit's IP strategy reflects its global presence and the need for strength in markets such as North America, Europe, India and Australia. With an aging IP database, Intuit knew it needed a modern IP management system to continue to deliver competitive advantage to the company's business units.



Senior Patent Counsel Arien Farrell joined Intuit in 2004 with a mandate to grow the patent portfolio. He succeeded, expanding the number of granted assets from 10 to over 850 in less than 15 years. While Intuit's IP team used a highly customized version of the company's popular QuickBase web-based database application to successfully manage the growth for years, future limitations became increasingly apparent, according to Farrell.

Name	Intuit
Industry	Financial and accounting software
Brands	Turbotax, QuickBooks, Mint.com
Customer Since	2016
Replaced	Home-grown system built on QuickBase



We really enjoyed it. Our patent QuickBase enabled us to do everything we wanted. It was super flexible, which is very important because the business became accustomed to us recording data and providing reports. But it was built on an older technology stack, so we decided in late-2016 that it was time to migrate to a more modern system.

Intuit's IP leadership prioritized flexibility. Years of familiarity with QuickBase's flexibility and reporting capabilities naturally ordered the wish list for a replacement system, beginning with system configuration. The ability for Farrell's team to run reports without restrictions was also near the top. So too, were "must-have" requirements for a modern technology stack that could evolve over time and security rigor to satisfy the demands of Intuit's corporate IT Security team.

Farrell and his team approached IPfolio and several other IP management system vendors, shared their design specs, and evaluated demos. Internal evaluations followed with a wide variety of stakeholders, including management, legal, technical leadership, internal technologists, security experts, inventor communities, and invention and patent review committees.

“Flexibility for us and fine grain level of control were key. A lot of solutions out there offer lots of modules but little flexibility. We needed something flexible, and IPfolio was the most like QuickBase in that area. We couldn't have a solution that we couldn't modify fairly readily. IPfolio also offered a really great value proposition in terms of cost and very strong support processes.

In addition to lacking flexibility, the other shortlisted solutions also lacked what Farrell calls “engagement.” While “you can do the basic stuff in them,” he thought the user experience as far as the difficulty in adding modules, changing forms or adding fields was extremely poor.

## Implementation

After a six-month process of deciding to migrate from QuickBase and selecting a replacement ended, the implementation phase began.

“We started by familiarizing the IPfolio team with QuickBase, and letting them dig into our processes, workflows and customization choices. We met regularly to deliver feedback on what we liked, disliked and the tweaks and changes we wanted. Because we're really picky, it probably took another six months to finalize exactly what we wanted before going live.

Towards the end of this implementation phase, in-person and remote user training sessions provided attorneys, paralegals engineers, and other future IPfolio account holders with the knowledge and awareness to be efficient from Day One.

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“My team logs in daily, of course. We're getting hundreds of disclosures every month so our inventors are clearly happy. Our twice-monthly reviewer meetings generate lots of traffic around those dates. And the paralegals at our outside counsel firms probably use it least five or six times a week. Overall, our IPfolio account is seeing lots of Intuit-based visitors.

A year after going live, Intuit's patenting and trademark operations are running smoothly on IPfolio. Farrell says his IP team “lives in it.” Inventors frequently log in to submit disclosure forms that are then reviewed by the reviewer community. Every outside law firm has IPfolio access to manage their dockets. A growing number of company executives have viewer accounts to monitor progress and status on demand.



## Results

While traffic is one success metric, Farrell can point to other areas where IPfolio has delivered, beginning with a significant speed difference.

“IPfolio is a lot faster than QuickBase since it is built on new technology. In addition to this speed benefit, another mentioned by my team is the interface; they really like it. Beyond these UX improvements, I think the biggest individual benefit is the ability to gather data on our different work projects and tasks, identify opportunities to improve, and then track our individual progress. That’s big.

IPfolio’s modernity also enabled Intuit to add a completely new module that QuickBase previously lacked. Internally dubbed the “Brainstorm Front-End Module,” it enables the IP team to capture interactions with the business, and inventory initiatives and in-progress projects.

“As we talk to the business, we capture initiatives, the people involved and the things they’re working on. We capture different projects and identify potentially patentable subject matter. With all this information, we can create an IDF in a moment. Interactions with everyone are now far more efficient and measurable. Because they’re tracked, we can report into

leadership on activity such as who is submitting an IDS, and which IDSes end up as filed patent applications.

While Farrell believes that some companies prefer rigidity to flexibility and want a restricted out-of-the-box solution, the freedom to tweak and tune variables, parameters and workflows has been huge to Intuit’s IP program. He cites IPfolio’s development on Salesforce as a reason why his IPfolio implementation was immediately successful and will likely continue to be as Intuit’s IP strategy and processes necessarily evolve in coming years.

“For me, the flexibility, reliability, and ability to really get into the reporting weeds are huge. With the the data I can access myself without any help or an email to IPfolio’s support desk, I can really measure our team and the company’s performance on protecting its IP. The depth of insight is hard to match.

