

# BURNSIDE BREAKFAST SERIES TOP 10 TIPS TO PROTECT YOUR IP

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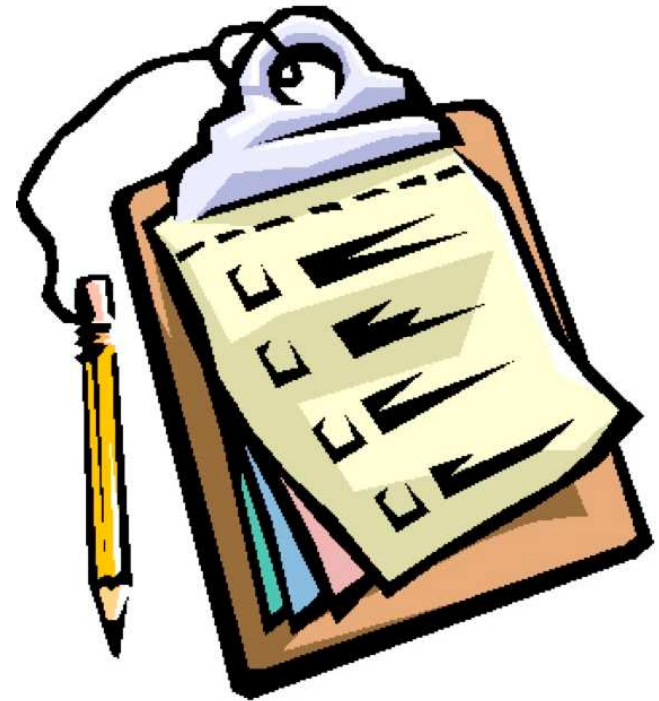


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# THE IP TOP TEN

- Basic Information
- Management Policies
- Document Rules
- Electronic Rules
- Third Party Guidelines



# 1. Recognize IP

- Trade-marks – distinctive word or design
- Copyrights – original expression of ideas
- Patents – new inventions or improvements
- Trade Secrets – secret IP rights
- Visit CIPO website



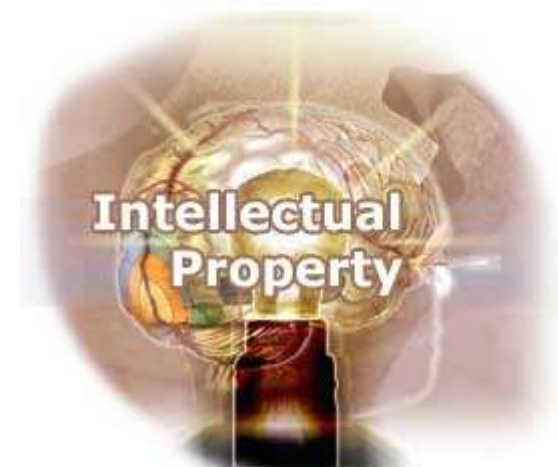
## 2. Read About IP

- Trade-marks Act
- Copyright Act
- Patent Act
- Visit CIPO website



### 3. Manage IP

- IP Protection Policy
- IP Officer or IP Committee
- IP Protocols – e.g. security rules
- IP Templates – e.g. non-disclosure agreement
- IP Training for Employees



## 4. Secure IP

- Restricted Access to IP – No Visitors
- Secure Storage of IP – Locks
- Authorized Personnel Only
- No Removal of IP from Premises
- No Photos or Cell Phones



## 5. Control IP

- Storage – IP docs stored securely & separately
- Distribution – IP docs are “need to know” only
- Labels – IP docs marked “confidential”
- Copies – IP docs in very limited copies
- Disposal – IP docs to be shredded



## 6. Computer-Safe IP

- DO
  - use password protection & encryption
  - log off and lock computer screens
  - change passwords regularly
  
- DON'T
  - use portable drives or devices for IP
  - leave IP materials unattended
  - share passwords





## 7. Email-Safe IP

- DO
  - stamp internal emails as “confidential”
  - avoid long email threads with “buried” data
  - take care to not disclose IP content
  
- DON'T
  - use “bcc” to distribute IP information
  - forward messages containing IP
  - transmit IP documents electronically



## 8. Marketing-Safe IP

- Get pre-approval for sales material and online content to prevent disclosure of IP
- Avoid discussing IP at trade shows and public events
- Get pre-approval for participation in surveys
- Consult IP or legal advisors before going “live”



## 9. Visitor-Proof IP

- Follow a Visitor Checklist:
  - Must sign a non-disclosure agreement
  - Must be supervised at all times
  - Must sign a Visitor Log Book
  - Must wear a Visitor Badge
  - No access to Secure Areas
  - No large groups
  - No photos
  - No phones



# 10. Third-Party Proof IP

- General Rules:
  - Recognize need to disclose IP to SOME third parties
  - Put approvals in place BEFORE disclosure
  - Inherently risky so always BEWARE
  - Sign Non-Disclosure AGREEMENT



# Questions

