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Beyond AI: Building an AI-Enabled Operating Model for Corporate IP Teams



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Executive Summary

AI adoption in intellectual property has moved rapidly from experimentation to everyday practice. According to Clarivate's 2025 survey*, adoption among IP professionals increased from 57% in 2023 to 85% in 2025. AI now supports activities across patent searching, drafting, prosecution, portfolio analysis, competitive intelligence, and IP operations.

For corporate IP leaders, the question is no longer simply where AI can be applied. It is how to redesign IP operations around the capacity, insight, and economics AI makes possible.

AI is also changing the economics of IP services. Activities that were historically too expensive or time-consuming, including portfolio-wide reviews, licensing opportunity identification, continuation analysis, infringement monitoring, and portfolio optimisation, are becoming commercially viable. At the same time, corporate IP teams are being asked to manage larger portfolios, generate broader business intelligence, and support more strategic decisions without proportional increases in headcount or budgets.

These changes are creating a new operating reality. In our work with corporate IP functions, Elevate sees the next stage of AI adoption less as a technology challenge than an operating model challenge. The question is how organisations redesign the allocation of work, technology environment, use of specialist expertise, and governance so that AI-enabled capacity translates into trusted business outcomes.

Our view is that an AI-enabled IP operating model requires organisations to address four interconnected design decisions:

- determining what AI performs, what people perform, and where handoffs occur
- matching technologies, data sources, and workflows to specific IP activities
- defining where specialist judgement is required, who validates outputs, who makes decisions, and who remains accountable
- establishing how quality, confidentiality, consistency, accountability, and outcomes are controlled and measured

This paper examines how these four decisions can help corporate IP teams move from adopting AI tools to redesigning IP operations around what AI now makes economically and operationally possible.

**Note: Clarivate Survey on The Evolution of AI in IP: Adoption, Impact and Readiness. Published November 18, 2025. Link here.*

AI Is Changing the Economics of IP Work

Artificial intelligence is increasingly embedded in everyday intellectual property operations. Across corporate IP departments, law firms, alternative legal service providers (ALSPs), software vendors, and patent offices, AI is moving beyond experimentation to support an expanding range of IP workflows. As AI adoption has accelerated, its impact is extending beyond individual productivity gains to reshape how IP services are delivered, how professionals create value, and what activities can be performed economically at scale.

Two structural changes are reshaping intellectual property services.

From Point Solutions to Connected IP Workflows

The first generation of AI adoption in IP focused primarily on patent searching, information retrieval, and drafting assistance. Today, AI applications span a much broader range of activities, including invention disclosure, patentability assessment, semantic prior-art searching, patent drafting, prosecution support, portfolio management, trademark operations, licensing opportunity identification, competitive intelligence, technology scouting, portfolio optimisation, and business reporting.

More importantly, AI is connecting activities across the IP lifecycle into integrated workflows, rather than simply automating individual tasks. Insights generated during searching or portfolio analysis can inform downstream prosecution, licensing, competitive monitoring, and portfolio decisions.*

The strategic opportunity is therefore shifting from making individual tasks faster to connecting IP activities so that insights generated in one part of the lifecycle can inform decisions elsewhere. For corporate IP teams, the value lies not simply in faster execution, but in greater visibility across the portfolio and a stronger connection between IP activity and business priorities.

When Previously Uneconomic Work Becomes Viable

Perhaps the most significant impact of AI is economic rather than technical. Historically, many portfolio-wide activities were performed selectively because the cost of manual analysis often outweighed the expected value. Portfolio pruning, licensing opportunity identification, continuation and continuation-in-part (CIP) analysis, infringement monitoring, technology scouting, competitive intelligence, and portfolio optimisation frequently required substantial time, specialist resources, and investment.

By reducing the time and effort required for large-scale analysis, AI is making a broader range of IP activities economically viable at scale and on a more continuous basis. Organisations can monitor portfolios more proactively, identify commercialisation opportunities earlier, monitor competitive developments, and generate richer business intelligence than was previously practical.

**Note: World Intellectual Property Organization on 'Report on Patent Analytics' - Link here.*

This changes an important operating assumption. As the cost of analysis falls, IP leaders can extend review beyond the highest-priority assets or periodic exercises to broader portfolios, more frequent monitoring, and opportunities that previously did not justify the resources required to investigate them.

Three Operating-Model Tensions Corporate IP Teams Must Now Solve

While AI has transformed intellectual property services, it has also changed what businesses expect from their in-house IP teams. Rather than simplifying the mandate of the corporate IP function, AI is expanding it.

Three structural shifts are redefining how corporate IP departments operate.

More Capacity Creates More Demand

AI-enabled productivity does not necessarily translate into lower workloads. As activities become faster and more economical, organisations can reasonably expect IP teams to support a broader range of work. Teams may be asked to analyse larger portfolios, respond more quickly to invention disclosures, provide richer portfolio reporting, deliver more continuous competitive intelligence, uncover licensing opportunities, and offer evidence-based recommendations without a proportional expansion of headcount.

Greater efficiency therefore raises expectations as well as capacity. The operating-model question is not simply how to process more work, but where additional capacity should be deployed to create the greatest business value.

Faster Analysis Increases the Value of Judgement

As information retrieval, comparison, summarisation, and first-pass analysis accelerate, expert capacity can shift towards the points where technical, legal, and commercial judgement have the greatest effect on outcomes.*

This includes evaluating search results, determining filing and prosecution strategies, assessing portfolio value, prioritising licensing opportunities, interpreting competitive developments, and connecting IP insights to broader business objectives.

This shift also changes the capabilities required within the IP function. Technical and legal expertise remain essential, but so does the ability to interpret AI-generated information, challenge outputs, assess commercial context, and make decisions under uncertainty.

**Note: Thomson Reuters Institute 'Future of Professionals Report 2026: When the AI Strategy Doesn't Reach the Desk'. Link here.*

In our view, this changes how organisations should think about human involvement in AI-enabled workflows. The objective is not to place a human reviewer behind every AI-generated output. It is to identify the decision points where specialist judgement materially changes the outcome and concentrate expert involvement there.

More Technology Creates an Orchestration Challenge

Corporate IP teams are operating across a broader technology ecosystem rather than relying on a single AI application. This may include foundation models, specialist IP AI applications, commercial patent databases, docketing systems, workflow automation platforms, internal knowledge repositories, outside counsel, and multiple service providers.

The challenge is therefore not simply selecting the 'best' AI tool. It is determining which combina tion of technology, data, expertise, and controls is appropriate for each workflow, and how those elements work together across the IP function.
Technology orchestration therefore becomes an operating-model capability, not simply a procurement decision.

These tensions cannot be resolved simply by adding AI to existing processes. They require deliberate operating-model choices about where work sits, which technologies support it, where specialist judgement enters the process, and how outcomes are governed.



Designing an AI-Enabled IP Operating Model

An AI-enabled IP operating model defines how work, technology, expertise, decision rights, and governance interact to deliver IP outcomes. The model is not defined by the AI tools an organisation deploys. It is defined by how those tools are incorporated into the way work is performed and decisions are made.

Work Allocation

The first design decision is determining which activities technology performs, which require human expertise, and where the handoffs occur. AI may screen or categorise large datasets, identify patterns, generate first-pass analysis, or surface candidate opportunities. Specialists can then focus on exceptions, validation, and decisions where technical, legal, or commercial judgement materially affects the outcome.

The appropriate allocation will vary by workflow and risk. A high-volume portfolio-screening exercise, for example, may permit extensive AI-led analysis before specialist review, while decisions affecting claim strategy, prosecution, licensing, or enforcement may require expert involvement much earlier.

Technology Orchestration

No single technology is optimal for every IP activity. Different workflows may require different combinations of foundation models, specialist IP applications, commercial patent databases, internal knowledge sources, docketing systems, and workflow automation.

An effective operating model therefore defines which technology and data sources support each workflow, how information moves between them, and where controls or human review are required. The objective is not to standardise every activity around a single platform, but to give each workflow the combination of technology, data, expertise, and controls it requires.

Expertise and Decision Rights

AI-enabled workflows require explicit decision rights. Organisations need to define who validates AI-generated outputs, which decisions require specialist involvement, when an issue should be escalated, and who remains accountable for the final outcome.

The level of specialist involvement should reflect the consequence of the decision rather than simply the presence of AI. Routine categorisation may require relatively light review, while filing strategy, claim interpretation, licensing assessment, enforcement, or portfolio valuation may warrant deeper technical, legal, or commercial scrutiny.

Making these responsibilities explicit prevents human oversight from becoming an undefined final checkpoint and instead embeds expertise at the points where it can materially improve the outcome.

Governance and Measurement

AI-enabled IP operations also require controls that extend beyond individual output review. These may include defined quality-assurance protocols, confidentiality and data-handling requirements, review and escalation thresholds, approved workflows and technologies, auditability, and clear accountability.*

Governance should also establish how performance is measured. Depending on the workflow, relevant measures may include turnaround time, cost, accuracy, consistency, specialist-review rates, opportunity conversion, portfolio coverage, or business outcomes.

The objective is not governance for its own sake, but a control environment that allows AI-enabled workflows to scale while maintaining quality, confidentiality, consistency, and accountability.

What the Operating Model Looks Like in Practice

The implications become clearer when these four design decisions are applied to specific IP workflows.

Example 1: Portfolio Optimisation

- AI-enabled activity: Screen a broader portfolio for signals relating to maintenance, pruning, licensing, continuation strategy, or further review.
- Specialist intervention: Review higher-value or ambiguous signals using technical relevance, claim scope, family position, commercial importance, and business strategy.
- Decision and accountability: Determine whether to maintain, allow to lapse, pursue licensing opportunities, investigate further, or escalate, with the responsible IP professional retaining accountability for the recommendation.

Example 2: Licensing Opportunity Identification

- AI-enabled activity: Analyse larger patent and product datasets to identify potential technical overlap and candidate licensing opportunities.
- Specialist intervention: Assess claim context, technical relevance, evidence quality, commercial significance, and the strength of the potential opportunity.
- Decision and accountability: Prioritise opportunities for deeper claim-chart analysis, commercial diligence, or licensing action.

**Note: United States Patent and Trademark Office. Guidance on Use of Artificial Intelligence-Based Tools in Practice Before the United States Patent and Trademark Office. 89 Fed. Reg. 25609. Published April 11, 2024. Link here.*

Putting the Operating Model into Practice: Elevate's Human-In-The-Lead Approach

The four operating-model decisions above require three delivery capabilities, i.e. an adaptable technology environment, specialist expertise at consequential decision points, and disciplined processes and governance. Elevate brings these elements together through its Human-In-The-Lead approach.

Figure 2. Elevate's Human-In-The-Lead IP Delivery Approach

Delivery Layer	Purpose	What It Delivers to Corporate IP Teams
Layer 1: Dynamic AI Stack	Combine the most appropriate AI technologies, commercial IP databases, proprietary tools, and workflow automation for each IP workflow.	**Fit-for-Purpose Technology** • Continuous innovation • Reduced technology evaluation and integration effort
Layer 2: Human SMEs (Subject Matter Expertise)	Experienced patent attorneys, engineers, scientists, trademark professionals, and IP specialists validate AI outputs and apply technical, legal, and commercial judgement.	**Expert-Led Validation and Decision Support** • High-quality recommendations • Greater confidence in critical IP decisions
Layer 3: Processes and Governance	Standardised workflows, review protocols, quality assurance, knowledge management, governance, and workflow automation enable repeatable execution.	**Consistent, Enterprise-Ready Delivery** • Scalable operations • Quality, accountability, and operational control
Integrated Delivery	Technology + Expertise + Operational Discipline	Scalable, trusted AI-enabled IP operations

Layer 1. Dynamic AI Stack

No single AI platform is best suited to every IP workflow. Elevate's dynamic AI stack combines foundation models, specialist IP AI applications, proprietary tools, commercial IP databases, and workflow automation technologies.

Different technologies are deployed where they create the greatest value. Semantic search models may support prior art searching, specialist applications may accelerate drafting or prosecution support, and workflow automation streamlines administrative and portfolio operations.

The objective is straightforward: apply the most appropriate technology to each workflow while continuously incorporating new capabilities as the AI landscape evolves.

Layer 2. Human Subject Matter Expertise

Elevate deploys patent attorneys, patent engineers, scientists, trademark specialists, and IP operations professionals at workflow points to review AI-generated outputs, validate technical accuracy, apply legal and commercial judgement, and develop recommendations that materially affect the outcome.

Human expertise is particularly important where judgement directly influences business outcomes, including search recommendations, claim strategy, prosecution strategy, licensing, valuation, enforcement, portfolio optimisation, and commercialisation decisions.

Layer 3. Processes and Governance

Technology and expertise deliver the greatest value when embedded within disciplined operational processes.

Elevate integrates AI-enabled activities and human review through standardised workflows, review protocols, quality assurance, knowledge management, workflow automation, governance frameworks, and defined accountability.

These processes enable AI-enabled workflows to be deployed consistently across technologies, jurisdictions, delivery teams, and customer engagements while maintaining quality, accountability, confidentiality, and operational control.

What the Model Enables

The value of the model lies not in any individual layer, but in how technology, expertise, and operational discipline work together. Together, these layers translate AI-enabled capabilities into three practical advantages for corporate IP teams.

Greater Scale

Broader portfolio analysis, continuous monitoring, and intelligence activities become viable without requiring proportional increases in internal capacity.

Greater Confidence

Specialist review can be concentrated around the decisions where technical, legal, and commercial judgement matters most, supported by consistent governance and defined accountability.

Greater Strategic Value

By reducing the resources consumed by information gathering and first-pass analysis, IP teams can direct more capacity towards portfolio strategy, licensing, competitive intelligence, commercialisation, and business decision support.

Conclusion

The next phase of AI adoption in corporate IP will not be defined by access to the most capable technology. It will be defined by how effectively organisations redesign IP operations around what that technology makes possible.

That requires deliberate choices about how work is allocated, how technologies and data are orchestrated, where specialist judgement is applied, who retains decision rights, and how quality and accountability are maintained at scale. Done well, AI does more than accelerate individual tasks. It makes broader analysis economically viable, concentrates expert capacity on higher-value decisions, and connects IP operations more closely to business priorities. The question for IP leaders is therefore moving beyond 'Where can we use AI?' to 'How should we organise IP work now that AI has changed what is possible?'

Elevate's Human-In-The-Lead approach puts that principle into practice by combining adaptable technology, specialist IP expertise, and disciplined governance around the work-flows and decisions where each creates the greatest value.



About the Authors



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Tarun is a VP and General Manager at Elevate, leading its IP business to help customers drive growth and gain a competitive advantage by turning innovation into monetisable assets.

His extensive IP expertise and knowledge of AI and machine learning ensure customers gain maximum advantage from a strategic, technology-driven approach to their IP activities.

He joined Elevate with the acquisition of Sagacious IP, an IP research and consulting firm he founded. With over two decades of experience, he has worked closely assisting innovators from startups to Fortune 500 companies and established a strong presence across Asia's IP ecosystem, especially in Japan, Taiwan, Korea, and China.

A six-time IAM Strategy 300 awardee, Tarun regularly writes on innovation management, patent monetisation, and the KPO industry in India. In 2021, Times of India named him to its Times 40 Under 40 list of the country's top innovators, business leaders, and entrepreneurs, and CNBC TV18 subsequently profiled him on its flagship show on entrepreneurship, The Young Turks. In recognition of his early leadership in India's IP services sector, he received a '30 Under 30' award from the alumni association of Birla Institute of Technology and Science, Pilani.



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Shubhendu Dwivedi is a Director at Elevate, where he helps organisations design and execute patent and trademark strategies that protect market entry, guide R&D and product direction, and strengthen licensing and dispute positions. He partners with IP and product leadership on launch-critical clearance, prosecution planning, and portfolio governance, aligning licensing priorities with overall risk management.

With over 15 years of experience in IP strategy and innovation intelligence, Shubhendu previously led the Life Sciences and Chemistry business unit at Sagacious IP, overseeing end-to-end delivery across portfolio, launch, and dispute-support programs. In his previous organisation, he served as a Life Sciences Solution Lead, supporting technology and partner scouting and synthesising patent and scientific evidence to guide enterprise decisions on competitive risk and commercial positioning. He also developed structured EPO opposition frameworks that analyse patterns of cited prior art to strengthen novelty and inventive step arguments.