

OCEAN TOMO

# INTERIM CHIEF INTELLECTUAL PROPERTY OFFICER (CIPO)



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In today's knowledge economy, **intangible assets represent 90% of the S&P 500's total market value.** This fundamental shift from tangible to intangible asset dominance demands executive-level attention to intellectual property (IP) strategy and management. Yet many organizations lack the specialized leadership required to unlock the full potential of their IP portfolios.

An interim CIPO bridges this critical gap, bringing business-oriented perspective and strategic oversight that extends far beyond traditional legal protection.

## Strategic IP Leadership

Our interim Chief Intellectual Property Officer (CIPO) professionals are trusted advisors who leverage decades of strategic and operational expertise to serve as full- or part-time executive leadership, providing decisive intellectual property management during critical transitions, organizational change, and periods requiring specialized IP expertise. We deliver stability, strategic vision, and actionable solutions to complex IP challenges while building enterprise value through business-asset focused management of your most critical company assets.

### RESPONSIBILITIES & STRATEGIC CONTRIBUTIONS







An interim CIPO operates at the intersection of intellectual property, technology, and business strategy, providing comprehensive oversight across multiple dimensions:

- Strategic Planning & Portfolio Management
- Monetization & Value Creation
- Risk Management
- Business Integration & Strategic Advisory

### WHEN TO ENGAGE AN INTERIM CIPO

Interim executives offer rapid access to senior-level expertise without requiring a full-time commitment. They provide an independent and objective perspective to help organizations address immediate challenges while laying the groundwork for long-term success.

## ENGAGEMENT SCENARIOS

SCENARIO	CHALLENGE	INTERIM CIPO SOLUTION
 Leadership Gap	Sudden executive departure creates vacuum in IP strategy and operations	Immediate placement maintains business continuity, stabilizes team, and ensures strategic initiatives continue
 M&A Transaction	Complex acquisition/divestiture requires comprehensive IP due diligence and integration	Lead IP assessment, identify risks/opportunities, and develop integration/divestiture strategy to maximize deal value
 Portfolio Optimization	Underutilized IP assets fail to generate strategic or financial returns	Conduct comprehensive audit, identify monetization opportunities, implement licensing or divestiture strategies
 Litigation Management	Major patent infringement dispute threatens business operations	Develop litigation strategy, coordinate with legal counsel, and manage risk while protecting business interests
 Strategy Development	Lack of alignment between IP activities and business objectives	Create integrated IP strategy supporting corporate goals, competitive positioning, and innovation priorities
 Scaling Operations	Rapid growth outpaces existing IP management capabilities	Build scalable IP processes, establish governance frameworks, and develop team capabilities

## Key Attributes of Our Interim CIPOs

### PROFESSIONAL EXPERTISE

- **Business Strategists:** Experienced executives who integrate IP into corporate strategy and execution, not just legal experts
- **Cross-Functional Leaders:** Ability to bridge legal, technical, and commercial domains with diverse stakeholder groups
- **Industry Veterans:** Decades of hands-on experience in IP strategy, portfolio management, licensing, litigation, IP lending, and corporate transactions
- **Proven Track Record:** Demonstrated success driving IP monetization, enhancing enterprise value, and navigating complex organizational challenges

### PERSONAL QUALITIES

- **Entrepreneurial Instincts:** Identify opportunities to create value from intellectual assets
- **Results-Oriented Leadership:** Focus on delivering measurable outcomes within defined timeframes



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## CONTACT

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As the former Chief Intellectual Property Officer of a food-tech company based in Raleigh, NC, John was a key member of the executive management team, brought on with the strategic goal of preparing the company for a near-term transaction. In this role, he oversaw all aspects of the company's intellectual property activities, including IP strategy and commercialization, portfolio management and development, IP disputes and litigation, IP transactions and licensing, education and awareness, and valuation and monetization.

With over 25 years of experience, John has built a distinguished career advising public and private companies, universities, law firms, Venture Capital and Private Equity firms, and government agencies across sectors, including technology, media, telecom (TMT); healthcare; food and agriculture; industrials; and energy.



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- **Effective Communicators:** Build consensus across organizational levels and serve as trusted advisors to C-suite, Board, and investors
- **Adaptability:** Thrive in high-pressure, short-term roles requiring rapid onboarding and immediate impact

## FLEXIBLE ENGAGEMENT MODELS

We tailor our interim CIPO services to your specific needs:

- **Full-Time Interim Leadership:** Complete executive responsibility for a defined period (typically 3-18 months), covering transitions, transformations, transactions, or strategic initiatives
- **Fractional/Part-Time CIPO:** Flexible arrangements providing strategic oversight and executive guidance on a part-time basis (1-3 days per week), ideal for organizations not requiring full-time IP executive presence
- **Project-Based Consulting:** Targeted engagements addressing specific challenges such as portfolio audits, strategy development, due diligence support, monetization planning, or capability building
- **Interim-to-Permanent Option:** Opportunity to transition successful interim placements to permanent roles when appropriate

## MEASURABLE BUSINESS IMPACT

Organizations engaging interim IP leadership experience tangible benefits:

- **Speed of Deployment:** Placement typically within days ensures minimal operational disruption
- **Immediate Impact:** Clear objectives and experienced leadership deliver results from day one
- **Operational Efficiency:** Optimize IP processes, manage outside counsel costs, and improve vendor performance
- **Strategic Clarity:** Align IP efforts with business objectives, capitalize on opportunities, and empower internal and external teams

## WHY CHOOSE INTERIM CIPO SERVICES

- **Decades of Strategic & Operating Experience:** Our professionals bring proven expertise across diverse industries, company stages, and IP challenges
- **Business-Focused Perspective:** We view IP as a strategic business asset, not merely a legal function, driving alignment with corporate objectives
- **Objectivity & Fresh Thinking:** External perspective uncovers hidden opportunities and challenges entrenched thinking
- **Stabilizing Force:** Build consensus among stakeholders while directing strategic initiatives during periods of uncertainty
- **Flexible & Scalable:** Adaptable engagement models and pricing structures meet your specific needs without long-term commitments

## TRANSFORM YOUR IP FROM COST CENTER TO STRATEGIC ASSET

In an economy where intangible assets drive the majority of enterprise value, effective intellectual property leadership is not optional—it's a strategic imperative. Our interim CIPOs provide the expertise, objectivity, and decisive leadership required to unlock the full potential of your IP portfolio while navigating complex transitions and challenges.



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## About Ocean Tomo, a Part of J.S. Held

Ocean Tomo provides expert opinion, management consulting, advisory, and patent analysis and reverse engineering services focused on matters involving intellectual property (IP) and other intangible assets. Practice offerings address economic damage calculations and testimony; business licensing strategy and contract interpretation; patent-focused business intelligence; portfolio development strategy; litigation support; trade secret reasonable measures; asset and business valuation; strategy and risk management consulting; merger and acquisition advisory; debt and equity private placement; and IP brokerage.

Ocean Tomo experts are routinely qualified in US District Courts, US Bankruptcy Courts, US Tax Court, US Court of Federal Claims, state courts, the US Patent and Trademark Office Patent Trial and Appeal Board, international courts, and arbitration tribunals on questions relating to IP economics. The firm's professionals have provided expert opinions on IP valuation, reasonable royalty, lost profits, price erosion, commercial success, corrective advertising, creditor allocations, Hatch-Waxman Act market exclusivity, business licensing terms, including RAND obligations, venture financing, and equities of a potential injunction. The firm's experience extends to general business valuation and commercial disputes, domestic and foreign, as well as policy issues affecting international technology transfer and economic matters before the International Trade Commission.

Intangible assets comprise 90 percent of business value but are also subject to significant impairment due to enterprise and regulatory compliance risk. Our services are built upon more than three decades of experience assessing IP in the most rigorous of venues. Our financial, market, scientific, and technical experts have deep experience with tangible and intangible assets protected by IP. We bring a unique understanding of the contributory value of proprietary innovation to every engagement. This is the cornerstone of our business.

Securities offered through PM Securities, LLC, d/b/a Ocean Tomo Investments, a registered broker-dealer. As a part of J.S. Held, Ocean Tomo works alongside more than 1,500 professionals globally and assists clients—corporations, insurers, law firms, governments, and institutional investors—on complex technical, scientific, and financial matters across all assets and value at risk.

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## About J.S. Held

J.S. Held is a global consulting firm that combines technical, scientific, financial, and strategic expertise to advise clients seeking to realize value and mitigate risk. Our professionals serve as trusted advisors to organizations facing high stakes matters demanding urgent attention, staunch integrity, proven experience, clear-cut analysis, and an understanding of both tangible and intangible assets. The firm provides a comprehensive suite of services, products, and data that enable clients to navigate complex, contentious, and often catastrophic situations.

In 2022, Ocean Tomo joined J.S. Held, continuing the strategic growth of the firm. Leveraging the J.S. Held team of more than 1,500 professionals around the world, our clients now have access to J.S. Held's suite of specialized services including:

- Business Enterprise Valuation
- Compliance & Regulatory Consulting
- Cyber Security & Investigations
- Digital & Data
- ESG & Sustainability Consulting
- Financial Investigations
- Interim Management & Independent Directors
- Labor & Dispute Investigations
- M&A Regulatory Response
- Turnaround & Restructuring

Headquartered in New York, J.S. Held has offices across the United States, Canada, Latin America, Europe, Asia Pacific, the Middle East, and Africa.

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