

# The Power of Storytelling: Bridging the IP Data Communication Gap

Dr. Silvan Berg, LexisNexis Intellectual Property Solutions  
Michael Wahlen, Boston Consulting Group  
Rachit Sharma, Boston Consulting Group



# Agenda

- Introduction to Storytelling
- Elements of a Compelling Story
- Visualizing Patent Data: Best Practices and Case Studies
- Q&A Session

**Share with us in the chat what you would like to learn in this webinar!**



# Today's presenters



**Michael Wahlen**  
**Expert Project Leader**  
Center for Growth & Innovation Analytics,  
Boston Consulting Group  
Boston, USA

- Project Leader based out of Boston, with expertise in using data-driven approaches to find new growth opportunities
- Supported over 100 clients across all industries, focusing on healthcare, industrial goods, and PIPE (Principal Investors & Private Equity)
- Core Member of BCG's Corporate Finance and Strategy Practice, specializing in building tools and apps for BCG's strategy practice
- Earned a PhD from MIT, publishing academic papers in *Management Science* and *The American Journal of Sociology*



**Rachit Sharma**  
**Knowledge Expert**  
Center for Growth & Innovation Analytics  
Corporate Finance & Strategy  
Boston Consulting Group  
Chicago, USA

- Knowledge Expert focusing on data driven identification of growth opportunities using wide array of innovation data sources. Specializes in structuring growth and innovation strategy in climate transition
- Well versed in IP landscaping/commercialization, citation networks analysis, innovation scouting, adjacent growth opportunity.
- Supported over worked on 250+ client projects across O&G, Industrial goods, Technology and PIPE.
- Earned MBA from Booth School of Business, Bachelors in Engineering from Delhi University



**Silvan Berg**  
**Head of Customer Success EMEA**  
LexisNexis Intellectual Property Solutions  
Bonn, Germany

- Lead Customer Success Team in EMEA at LexisNexis Intellectual Property Solutions
- Manager at management consulting boutique specializing on large-scale IT transformations in the banking and insurance industry.
- Startup-founder in patent language using natural language processing models to gain insights into the technological classifications of patents.
- Earned PhD from University of Bonn in in Technology and Innovation Management – research on patent data driven approaches for technology and organizational forecasting.

**DEFINITION**



**IMPORTANCE**



# Introduction: What is storytelling?

**Storytelling is the interactive art of using words and actions to reveal the elements and images of a story while encouraging the listener's imagination.<sup>1</sup>**

## What makes a 'stories' distinctive?



**Imagination:** Storytelling is not a lecture; it is designed to spur the listeners imagination



**Interactivity:** The information being given is constructed around the audience's needs and desires



**Narrative:** Though storytelling differs across cultures, stories are defined by the thread that weaves the components together into a whole

## How does a 'story' differ from a 'plot'?

*Though often used interchangeably, "plot" is the 'how' of the story – the sequence of events – while a 'story' encompasses much more*



**Context:** Plots emphasize a cause-and-effect relationship, while a story provides context around those events



**Characters:** Stories rely on characters to give the events meaning, while a plot focuses on the actions of the characters



**Meaning:** Plots focus on the sequence of events, but stories provide the context, characters, and themes that give the events meaning

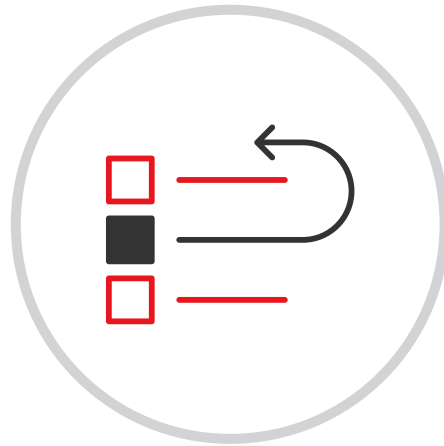
*...Two passengers start a romance on an ill-fated ship that ultimately sinks...*

# Why is storytelling important?



## Clarifies our thoughts

"The first draft is just you telling yourself the story"  
- Terry Pratchett



## Organizes the discussion

"Storytelling is the most powerful way to put ideas into the world today"  
- Robert McKee



## Enables audiences to remember

"The human species thinks in metaphors and learns through stories"  
- Mary Catherine Bateson

**VISUALISING**

**PATENT DATA**



# Tell me a Story I want to be Part of!

## Know Your Objective and Your Audience

- Time: Understand the time constraints for your presentation (part of a SteerCo vs. focused session).
- Level of Knowledge: Gauge the audience's familiarity with the topic.
- Relevance: Ensure the content is pertinent to their interests and needs.

There are many archetypes of storytelling, but these three have been most useful in business...

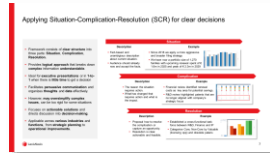
### Archetype

### Focus

### Details

A

#### Situation Complication Resolution

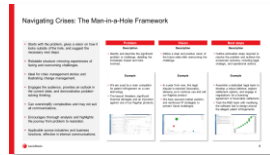


A story to get a clear decision

- **Situation:** Set the stage by describing the initial scenario.
- **Complication:** Introduce the problem or conflict.
- **Resolution:** Present the resolution or outcome.

B

#### The Man-in-a-Hole (adjusted)



A story in crisis / change management

- **Fall:** We encounters a significant setback.
- **Vision:** Clear and positive vision of the future.
- **Next steps:** Actionable steps required to resolve the problem.

C

#### Hero's journey



A story to tell on business success

- **Departure:** The hero is called to leave their ordinary world.
- **Initiation:** They face trials and gain allies and wisdom.
- **Return:** The hero returns transformed, with newfound insights or solutions

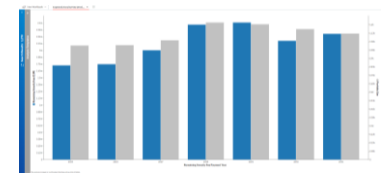


# Applying Situation-Complication-Resolution (SCR) to get clear decisions

- Framework consists of **clear structure** into three parts: **Situation, Complication, Resolution.**
- Provides **logical approach** that breaks down **complex** information **understandable.**
- Ideal for **executive presentations** when there is **little time** to get a decision.
- Focuses on **actionable solutions** and organizes **thoughts** and **data** effectively.
- However, framework **may oversimplify complex issues**, can be **too rigid** for some situations (if we don't have facts).

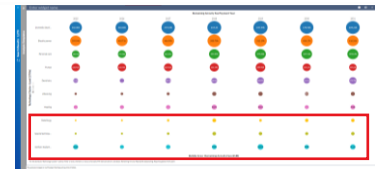
## Situation

- Fact-based and unambiguous description.
- Audience should know and accept facts.
- Since 2018 we apply a more aggressive and broader filing strategy.
- We have a portfolio of 1,270 families with renewal spent of € 1.6m in 2025.



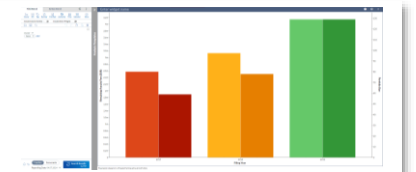
## Complication

- The reason the situation requires action.
- What has changed and what is the impact.
- Financial review identified renewal costs as key area for savings.
- R&D review highlighted patents that are no longer in strategic focus.



## Resolution

- Proposal how to resolve the complication.
- Resolution is clear, actionable and feasible.
- Established a cross-functional task force between R&D, Finance and IP
- Categorise into Core, Non-Core but Valuable and obsolete patents

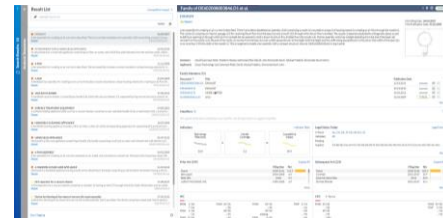


# Utilize the Man-in-a-Hole Framework (adjusted) to communicate in crises

- Starts with the **problem**, gives a **vision** and suggest necessary **next steps**.
- Ideal for **crisis management** and illustrating **change management**.
- Encourages **thorough analysis** and shifts away the focus from the **problem** to the **resolution**.
- However, may **not suit all communications** (esp. external communication) and may require **alliances** that **trust your vision**.

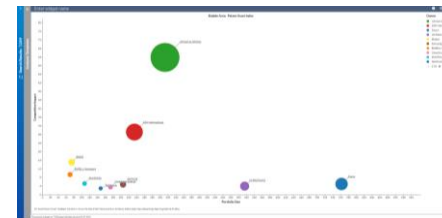
## Problem

- Identify and describe the significant problem or challenge, detailing the immediate impact and risks involved.
- We are sued by a main competitor for patent infringement on a core technology.
- The lawsuit threatens significant financial damages and an injunction against one of our flagship products.



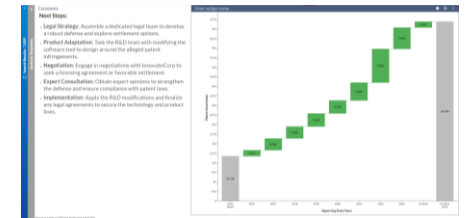
## Vision

- Define a clear and positive vision of the future state after overcoming the challenge.
- In a year from now, this legal dispute is resolved favourably, allowing us to continue use and sell our flagship product.
- We have secured market position, and reinforced IP strategies to prevent future challenges.



## Next steps

- Outline actionable steps required to resolve the problem and achieve the envisioned.
- Assemble a team to develop to explore settlement options or engage in negotiations for a licensing agreement.
- Task the R&D team with modifying the technology around the alleged patent infringements.



# Leveraging the Hero's Journey Framework for Business Success

- Framework includes three main stages: **Departure**, **Initiation**, and **Return**
- Creating engaging and **relatable narratives**, enhancing **customer connection**.
- However, can be **vague** and need to carefully **avoid positioning oneself as hero** (team, business).
- Best utilized in **marketing strategies, success stories** and **recruiting** stories.

## Departure

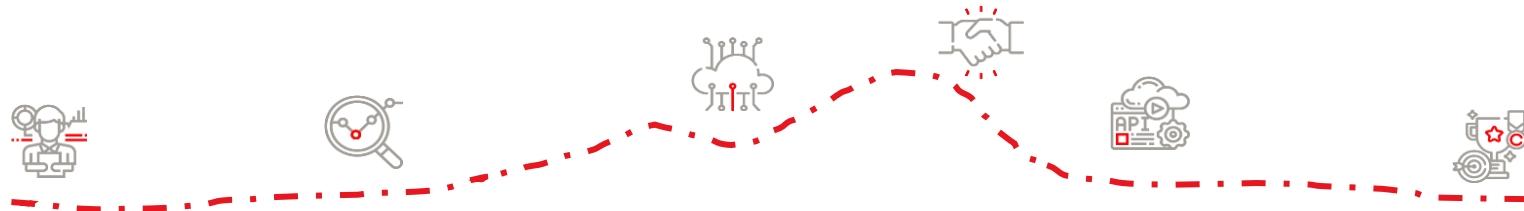
Hero's journey starts after initial hesitation, aided by a mentor.

## Initiation

Hero faces challenges, overcomes obstacles, and gains valuable insights.

## Return

The hero returns with newfound knowledge or a valuable asset.



- **Hero:** The IP Analyst is the hero on a quest to enhance an AI monitoring tool.
- **Departure:** The IP Analyst identifies the need for AI driven patent monitoring application and receives support from data science team.
- **Initiation:** The IP Analyst integrates the API, tackles technical issues, and successfully tests the AI monitoring tool.
- **Return:** IP Analyst ensures the improved AI tool runs smoothly, gives trainings and demonstrates its value.

# Principles for data visualizations

## Steps to ensure visualizations add the story without becoming the story



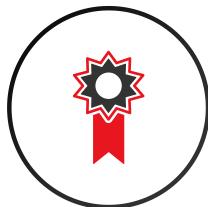
Time spent explaining the visual is time not spent on the story. The simpler, the better!



Be clear on the point of the visualization (e.g., is it meant to show give the audience a sense of the data or convince them of a point?)

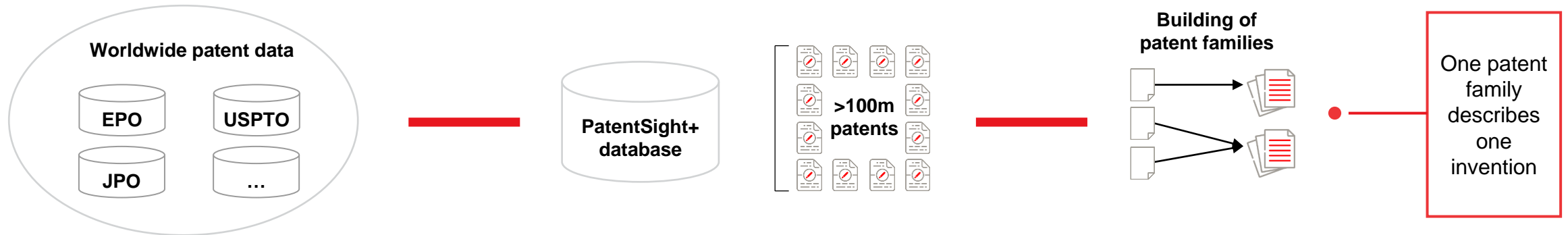


Data does not 'speak for itself.' It needs clear explanations, labels, and context to get its point across

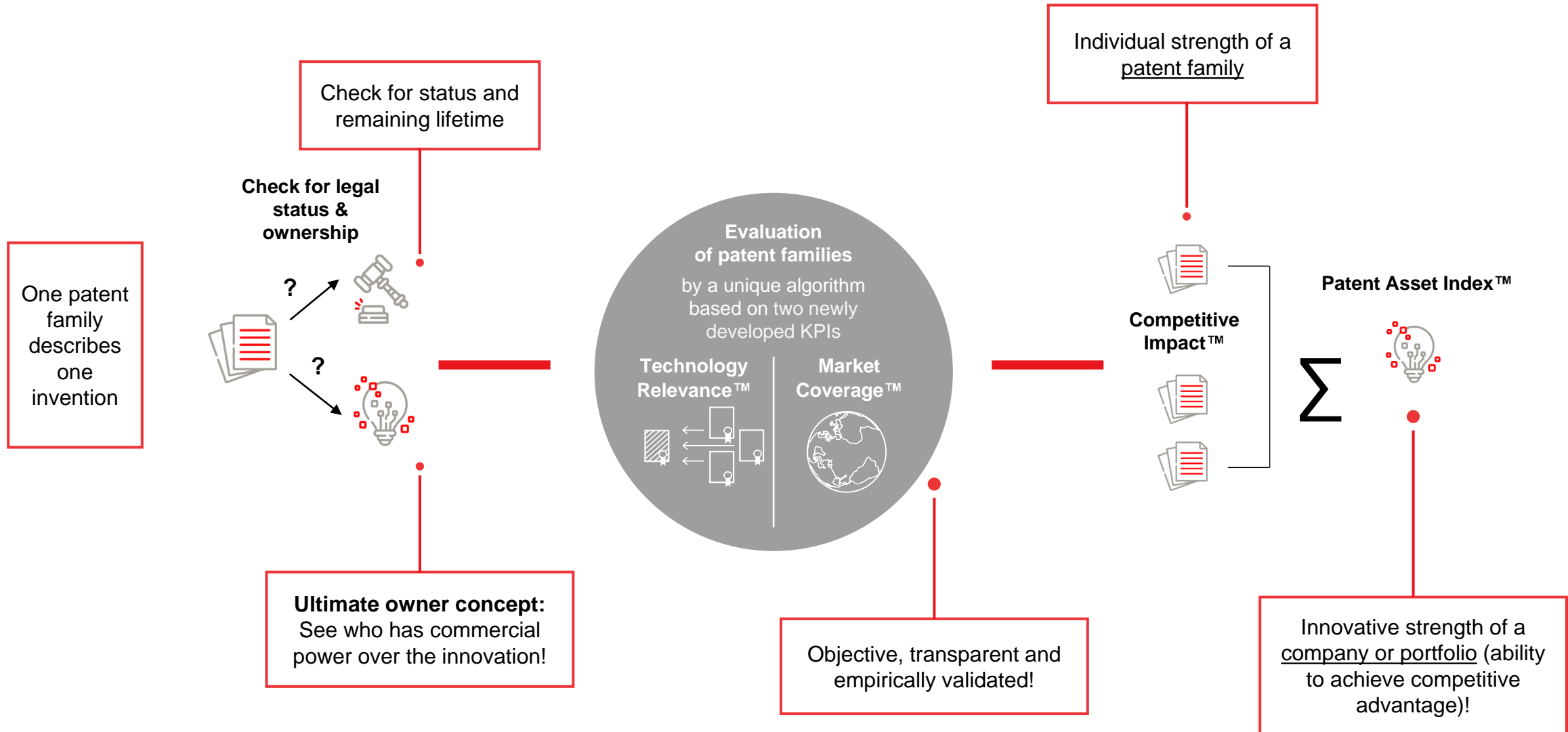


Less is more. In general, audiences prefer fewer, better visualizations to many simplistic or vague visuals

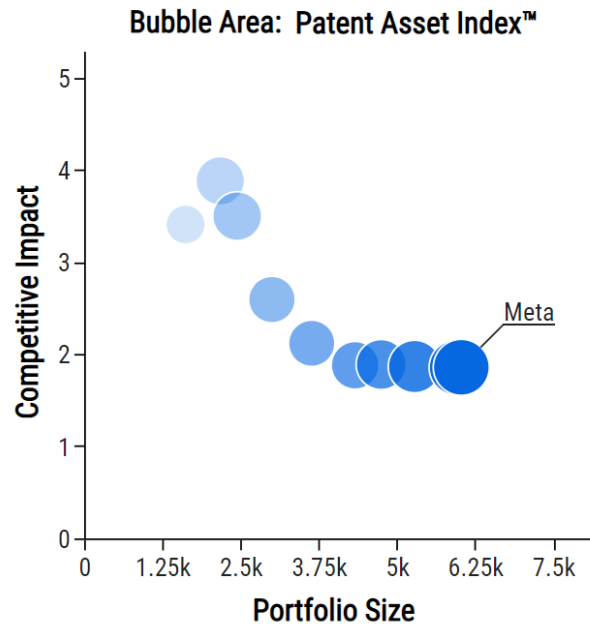
# Our data cleaning approach



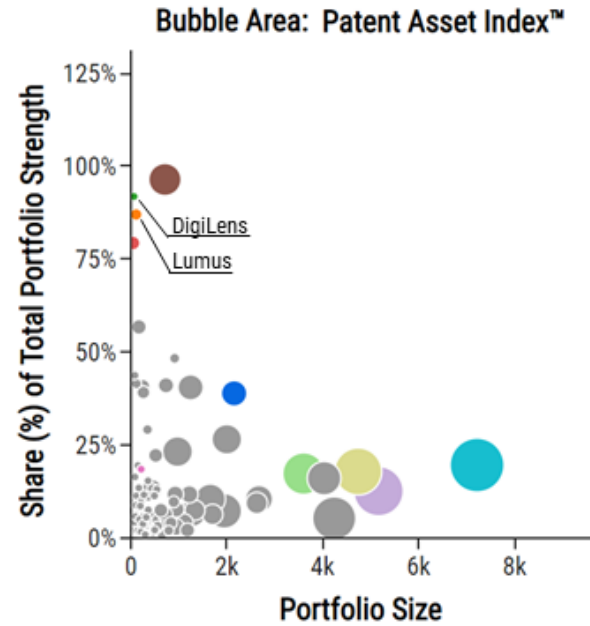
# Our quality assessment approach



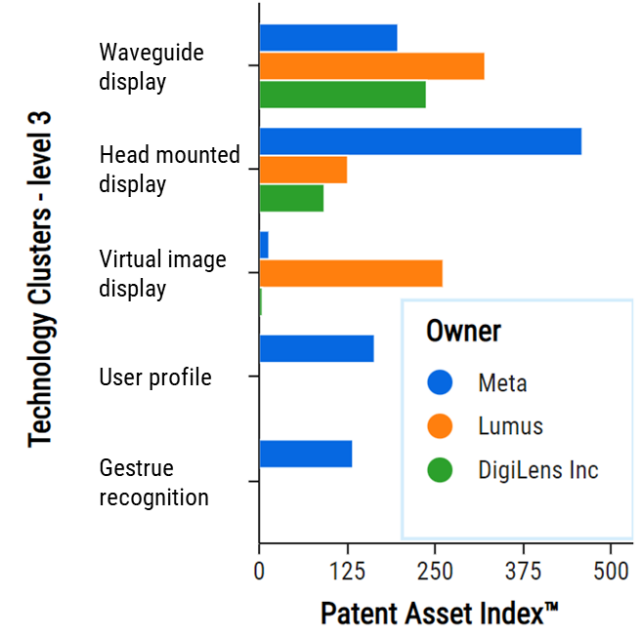
# Presenting your insights



- Proven best in class **harmonized ownership** information
- True **trend analysis** with Reporting Date



- **Identify acquisition targets** with small high-quality portfolios
- Determine both quality, and **company focus** in specific technology fields

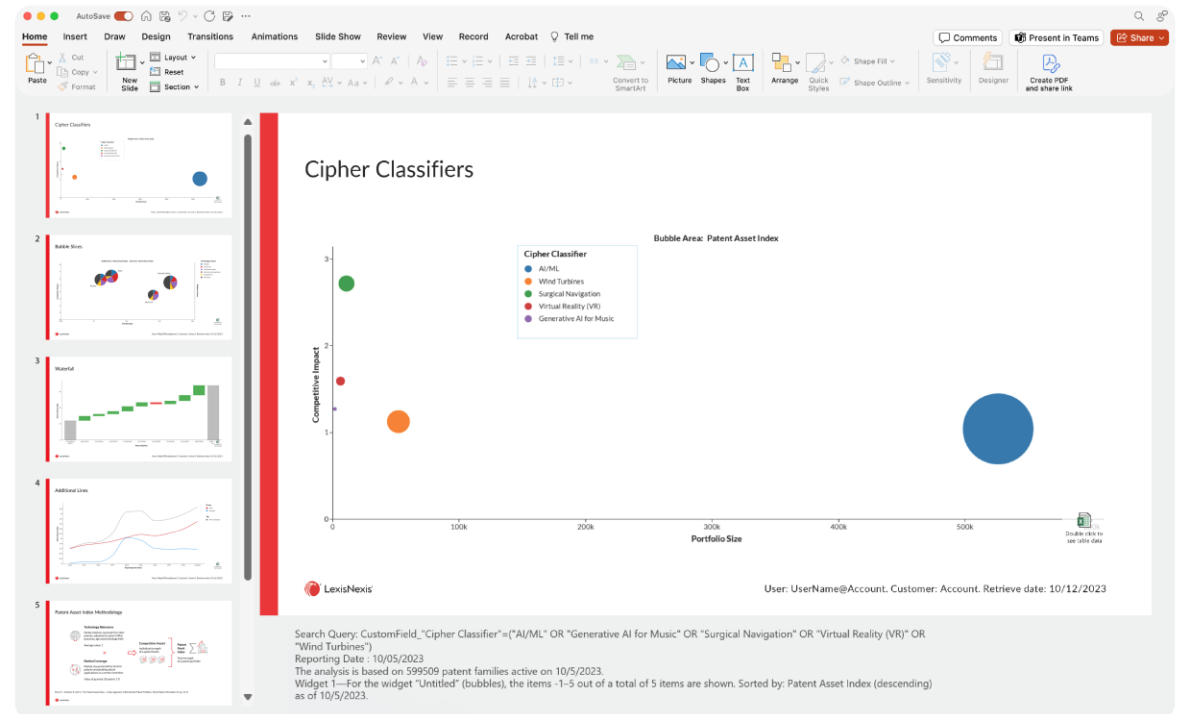
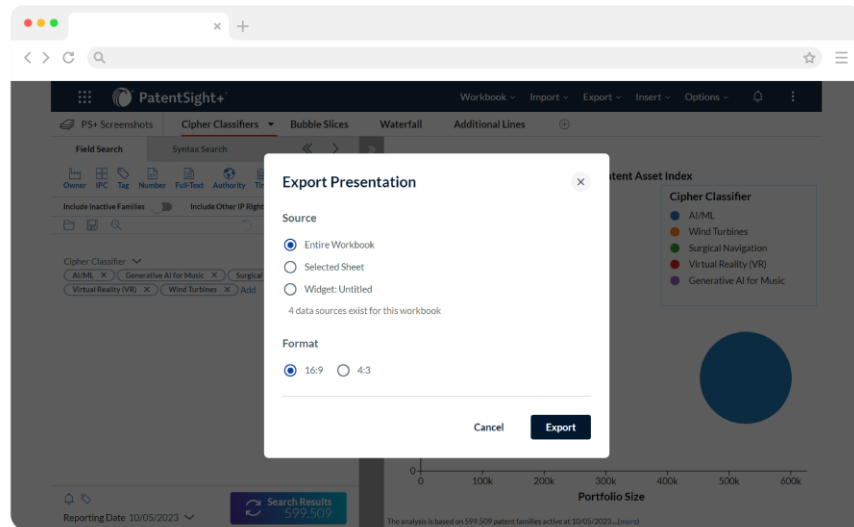


- **AI-defined Technology Clusters** allow quick breakdown of technologies into their components
- **Compare strengths and weaknesses** of acquisition targets with acquirer

# Enhance IP Storytelling with Additional Visualization Options

## Export Presentation function

Share findings with colleagues and stakeholders by exporting static images of the charts and data from your workbooks into PowerPoint presentations with ease.

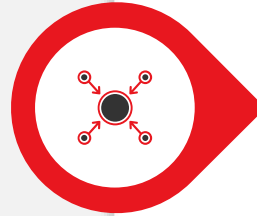




# CLIENT EXAMPLE

**Background**  
IPs are expensive assets and often under-utilized, enabling us to find growth opportunities

IP analytics can help uncover and exploit hidden value in clients' IP



**Within core** - extracting maximum value from existing technology (e.g., expand coverage to extract more premium)



**Relevant adjacent areas** – IPs may have valuable applications away from core idea, often unknown to the company. These IPs can be leveraged to set-up of new products and businesses

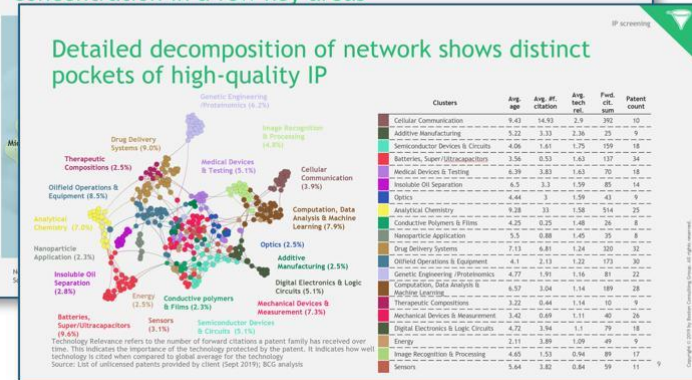
Leveraging Innovation tools, we can identify the right partners to create new business & revenue streams

# BACKGROUND We use a three-step process to identify commercial opportunities from IP

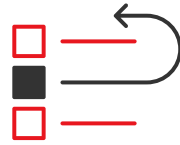


## IP Screening

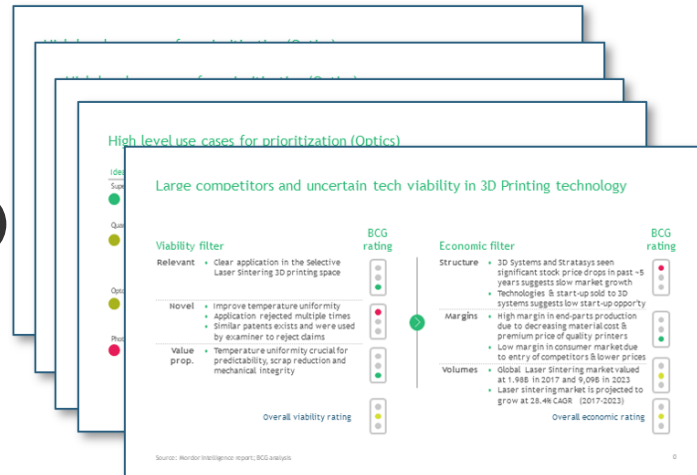
Client has diverse portfolio of technology with concentration in a few key areas



Screen patent families, group into clusters and identify high potential items based on quality and citation



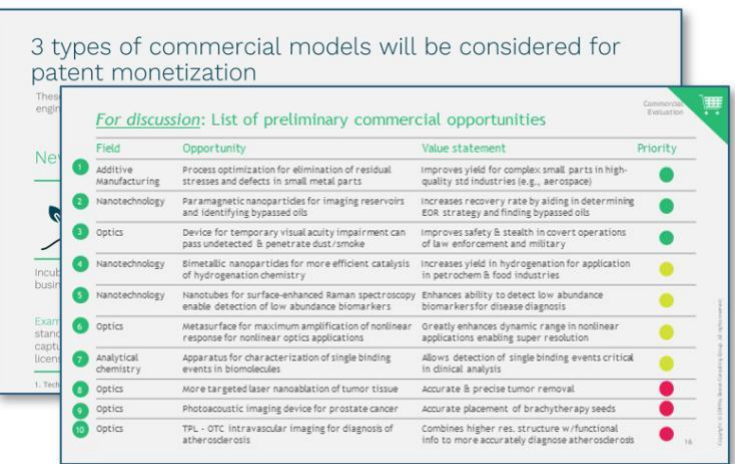
## Opp'ty Prioritization



Develop commercial ideas from high potential items and prioritize 5-10 use cases based on based on tech, economic & internal viability



## Commercial Evaluation



For 1-3 commercial priorities, develop target sectors, commercial model and list of potential buyers

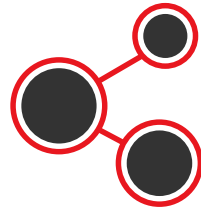
## Context

An automotive major wanted to identify adjacent growth opportunities which can help diversify its revenue streams

BCG leveraged patent citation networks as one of the indicators to identify alternate applications for their existing technologies.



Understand patent portfolio: Technology focus, high value pools, etc.



Understand key citing industries and visualize



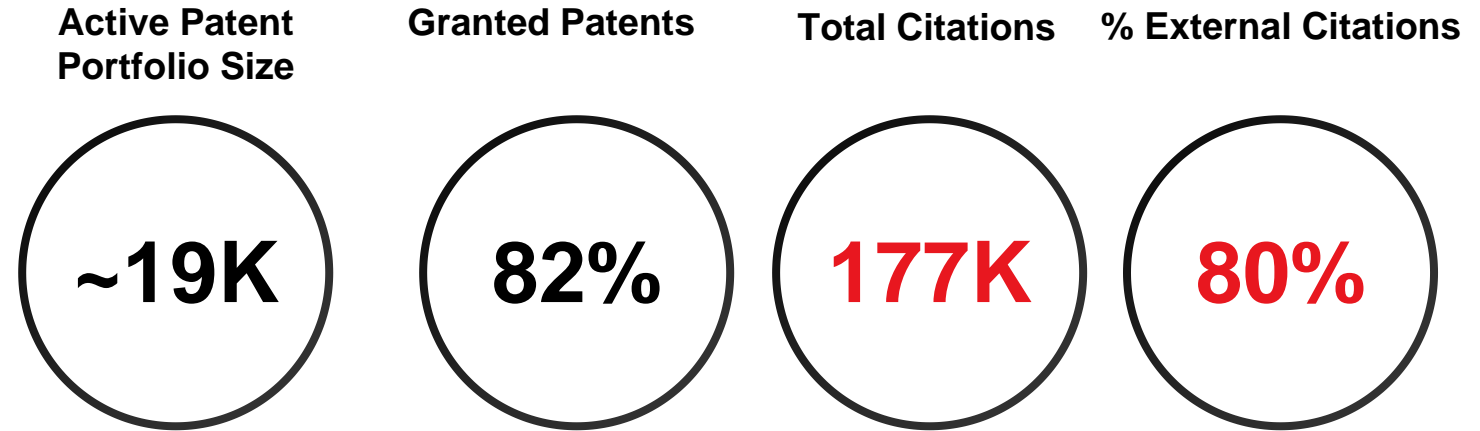
Prioritize areas with high impact and value



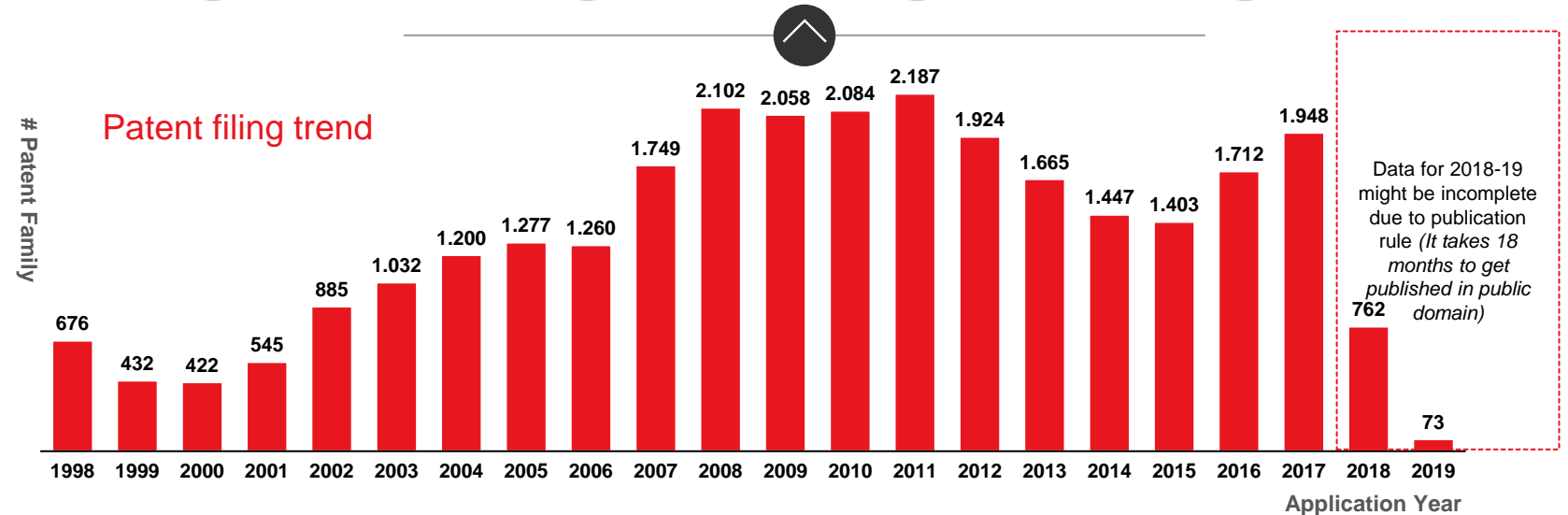
Quickly refine, test, and validate ideas

# Client has a large, growing portfolio serving as a big data source of identifying potential growth ideas

Client's patent portfolio has attracted strong traction from other companies indicating influential innovation & potential for growth opportunities



Consistently growing portfolio indicates client's emphasis on R&D and innovation



Note: Analysis based on ~19K active patent families of client. Patent filing trend also includes inactive patent families. Source: LexisNexis PatentSight, BCG Center for Growth & Innovation Analytics (GIA)

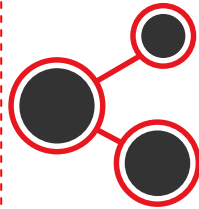
## Context

An automotive major wanted to identify adjacent growth opportunities which can help diversify its revenue streams

BCG leveraged patent citation networks as one of the indicators to identify alternate applications for their existing technologies.



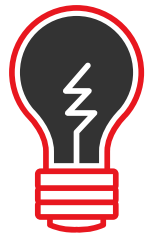
Understand patent portfolio: Technology focus, high value pools, etc.



Understand key citing industries and visualize

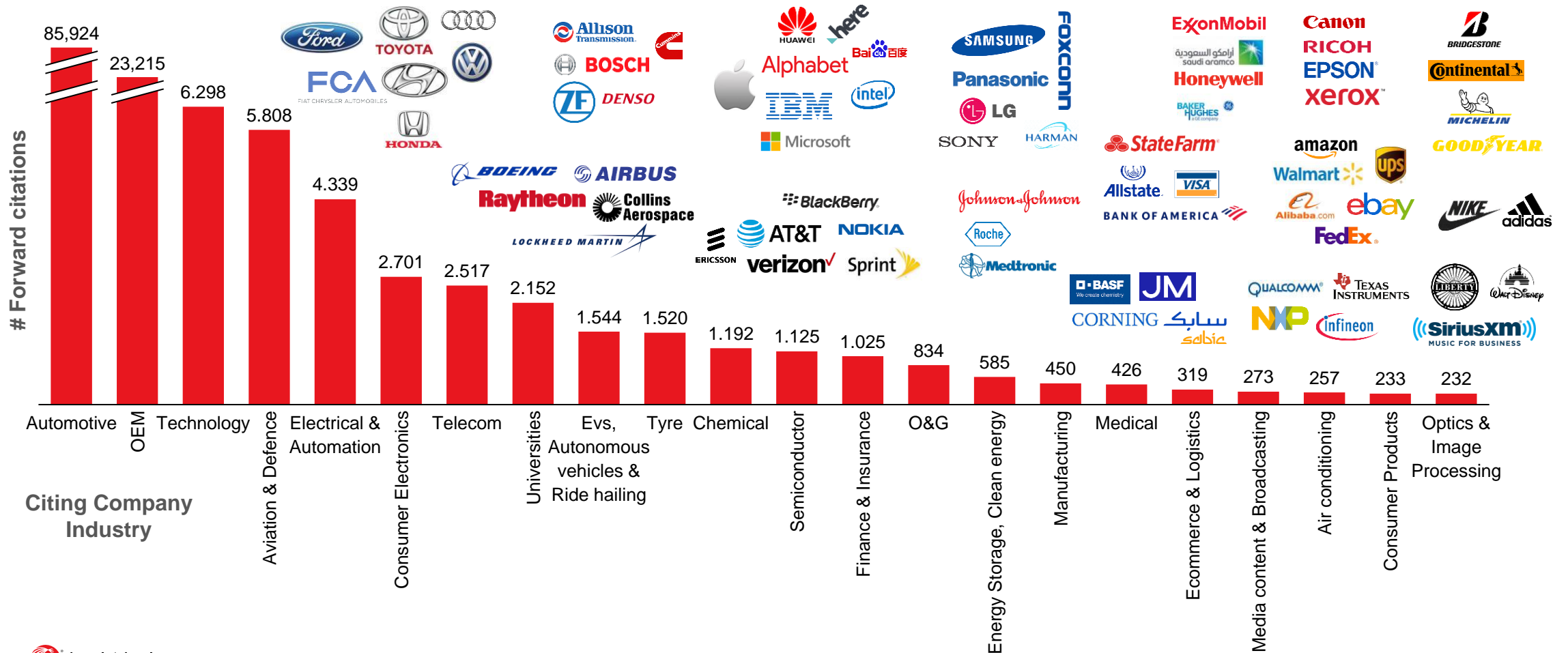


Prioritize areas with high impact and value



Quickly refine, test, and validate ideas

Client's patent portfolio has attracted citations from diverse industries indicating both core and noncore application areas



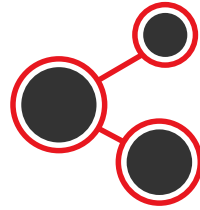
## Context

An automotive major wanted to identify adjacent growth opportunities which can help diversify its revenue streams

BCG leveraged patent citation networks as one of the indicators to identify alternate applications for their existing technologies.



Understand patent portfolio: Technology focus, high value pools, etc.



Understand key citing industries and visualize



Prioritize areas with high impact and value



Quickly refine, test, and validate ideas



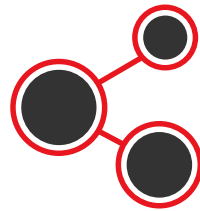
## Context

An automotive major wanted to identify adjacent growth opportunities which can help diversify its revenue streams

BCG leveraged patent citation networks as one of the indicators to identify alternate applications for their existing technologies.



Understand patent portfolio: Technology focus, high value pools, etc.



Understand key citing industries and visualize



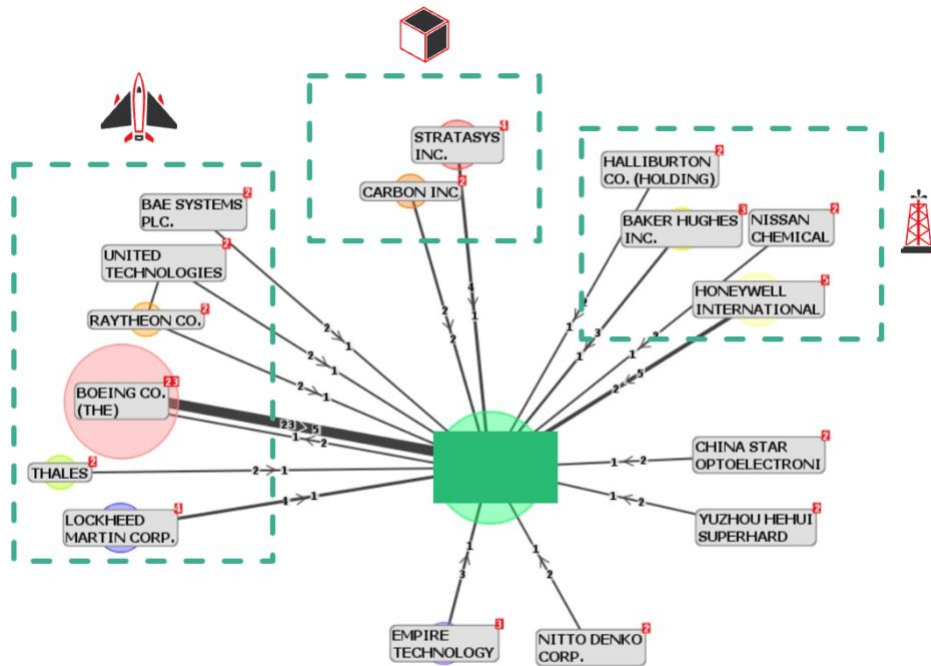
Prioritize areas with high impact and value

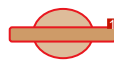


Quickly refine, test, and validate ideas

# Idea: Composite/3D material technology can be a new business to cater aerospace/defense industry

## Cluster: Active materials & Polymers



 Citing Companies  
 Halo size = #Citing patents  
 Red tag = # Citing patents

## Client's high-quality patents in 3D structure materials...

- USXXB1 – Optically oriented 3D microstructures
- USXXB1 – Ceramic microtruss
- USXXB1 – Composite structures with (3D) continuous interpenetrating phases

## ...with citation interests from defense, aerospace & 3D printing players:

- Ventilated Aero-Structures, Aircraft, and Associated Methods (**Boeing**)
- Mechanical attachment for micro-truss actively cooled structural insulation layer (**Boeing**)
- Mechanical attachment for micro-truss actively cooled structural insulation layer (**Boeing**)
- Integrated multi-chamber heat exchanger (**Raytheon**)
- Mechanically reinforced foam insulation panel and methods of making the same (**Boeing**)
- Continuous 3 D fabrication from immiscible liquids (**Carbon 3D**)

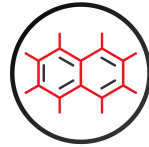
## Key Takeaway

- Spin off the composite/3D material technology to a new business or JV with the aim to address Defense & Aerospace industry.
- Collaborate with 3D printing startups (startups can bring in their expertise in printers) to set up a JV for catering to the 3D material for aerospace/defense.

## Key Findings and Value Creation



**Portfolio Segmentation:** Segmented the portfolio to understand high value pockets



**External industries:** Identified key citing industries and network of companies leveraging similar tech in alternate applications



**Adjacent growth areas:** Identified 20+ growth opportunities where existing technologies can be leveraged. Tech can be used to build new capabilities, partnering with prominent ecosystem players.



**Commercialization Archetypes:** Recommended high level archetypes i.e., licensing, Technology transfer, JV, spin off, etc.

# Personal lessons learned on using Storytelling

1. Reduce complexity and be consistent (use backup / footnotes)
2. Use visuals over text (if possible)
3. Three is (often) the Magic number (if more than uneven numbers)
4. Stick to the most relevant facts (one slide, one message)
5. Highlight concerns and expect critical questions in advance (built alliances)
6. Time management – have always enough time to define next steps
7. Say more often: „I don't know, but let's find out“

**QUESTIONS?**

---

# Thank you

**Dr. Silvan Berg**

*Head of Customer Success EMEA*

Office: +49 228 763711 12

Cell Phone: +49 160 96833603