

How ServiceNow used the Now Platform[®] to digitally transform its patent application process

Invention Disclosure Form app accelerates patent submission and increases program participation

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Part 1: Transforming the ServiceNow patent process

Introduction

Innovation drives every successful technology company, especially ServiceNow, which Forbes magazine named the most innovative company in the world in 2018. One of the ways we support innovation at ServiceNow is the Invention Disclosure Form (IDF) application, which automates our patent process and makes it easy for inventors to submit their ideas. Built on the Now Platform®, the IDF app features:

- An intuitive interface and streamlined online submission form
- The ability to attach documents, images and other files to the form to clarify the idea
- Automated notifications that provide updates to inventors and the patent team
- The ability to view and analyze all company invention submissions

This use case will review the challenges that led to the creation of the IDF app, how we developed it, the benefits we realized, and key takeaways for those wanting to build a similar app with the Now Platform. We will also give an overview of how the IDF app works.

Challenges

Our previous patent process fell short in multiple ways:

- **Manual, unstructured workflows** – Managing the process with spreadsheets, email, and phone calls was inefficient, time-consuming, and error-prone. Because the process involved outside counsel, the inefficiency was also costly.
- **Information gathering** – The submission form was overly complex and challenging for inventors to complete. The frequent back-and-forth between inventors and the patent team to gather the necessary details was frustrating for both parties and a disincentive for inventors to participate.
- **Knowledge gap** – There was a knowledge gap between the inventor and the patent team, which needed to be bridged for the patent team to make an informed assessment of the idea.
- **User experience** – The excessive administrative effort and time commitment was burdensome for everyone involved.

Creating the Invention Disclosure Form app

The patent team recognized that to improve efficiencies and increase program participation, the entire process needed to be transformed.

- **Research and plan** – The team first met with all stakeholder groups to identify deficiencies in the current process and get buy-in.
- **Redesign the form** – The patent team streamlined the form from 15 mandatory fields to only two, and added the ability to attach supporting documents, images, flow charts, and other materials to clarify the idea.
- **Build the IDF app** – The patent team worked with IT to create the app using the Now Platform. Manual workflows were automated, including email alerts and updates to inventors and the patent team. With the new app, supporting documentation follows the submission form throughout the entire process, significantly reducing or eliminating the back-and-forth between inventors and Legal.
- **Optimize** – The Now Platform enables the patent team to measure results against goals and make ongoing improvements to the submission form and the app as needed.

Benefits

The Invention Disclosure Form app has delivered both measurable and qualitative benefits to ServiceNow and participating employees:

- **87% increase in patents per year** – Before the IDF app, the patent team processed 80 patents per year. After the IDF app, the team processes an average of 150 patents per year, nearly doubling the team's output. This has enabled us to scale the patent program with the company's rapid growth.
- **60% reduction in time to process patents** – Before the IDF, the patent team spent an average of 10 hours per patent. The team now spends only four—a savings of six hours.
- **900 hours saved per year** – We now process 150 patents per year at a savings of six hours per patent. Since the process involves outside counsel, the cost savings are also sizeable.
- **Enhanced user experience** – Inventors are freed from complex application forms and the frustrating back-and-forth with Legal to explain their idea, allowing them to spend more time innovating. The patent team also benefits, spending less time on administrative tasks, and more time on the patents themselves.

Key takeaways

Companies can use the Now Platform to create digital workflows that transform virtually any business process. For those interested in developing an app to automate their own patent process, we offer these lessons learned from our journey:

- Start by setting clear program goals and getting stakeholder feedback and buy-in. This is critical to ensuring participation.
- Simplify the submission form to include only the essentials. Streamline the process wherever possible, then automate using the Now Platform.
- Measure program results against goals and tune the form and processes as needed.

Part 2: How the IDF app works

Accessing the invention disclosure form

To begin the invention submission process, the submitter logs in to Surf—the company's internal instance of ServiceNow—enters "Invention" in the search bar, and clicks "Create New" to bring up the form, which will be auto-populated with the submitter's name, business unit, and supervisor.

Note: The chevrons at the top show the process flow. The blue line indicates the current phase.

Filling out the form

The submitter fills out the form, including a detailed description of their idea and the names of any co-inventors, and attaches or enters links to images, documents, and videos to clarify the idea. The submitter then either saves the form to complete later or submits it for review by the patent team.

Patent team review

Based on the description and supporting documents, the patent team determines whether to proceed with an application:

- If “No,” a team member clicks “Do Not Proceed,” and the submitter is notified via email.
- If more information is needed, the team member clicks “Clarification Required,” and the submitter is notified by email.
- If “Yes,” the team member clicks on “Proceed With Application” to take further action.

The patent team selects the outside counsel from the drop-down menu and enters the date. An email is sent to the outside counsel with the form and related attachments. The patent team can also update without sending, stop the process, or ask the submitter for more information.

The screenshot shows the 'InventionDisclosureForm - IDFXXXXXX' interface. At the top, there are navigation tabs: 'Inventor Form', 'Legal Form', and 'Activity Log'. Below this, a blue banner states 'This section will be filled by Patent Counsel team'. The form contains several input fields: 'Outside Counsel' (a dropdown menu), 'Place Of Conception', and 'Date Assigned to Outside Counsel'. The 'Date Assigned to Outside Counsel' field is highlighted with a red box. At the bottom of the form, there are four buttons: 'Update', 'Proceed With Application', 'Do Not Proceed', and 'Clarification Required'. The 'Update' button is also highlighted with a red box.

Outside counsel review and patent filing

After reviewing the submission, outside counsel may contact the inventor(s) to clarify a few points. However, because detailed documentation was included with the form, follow-up is typically minimal.

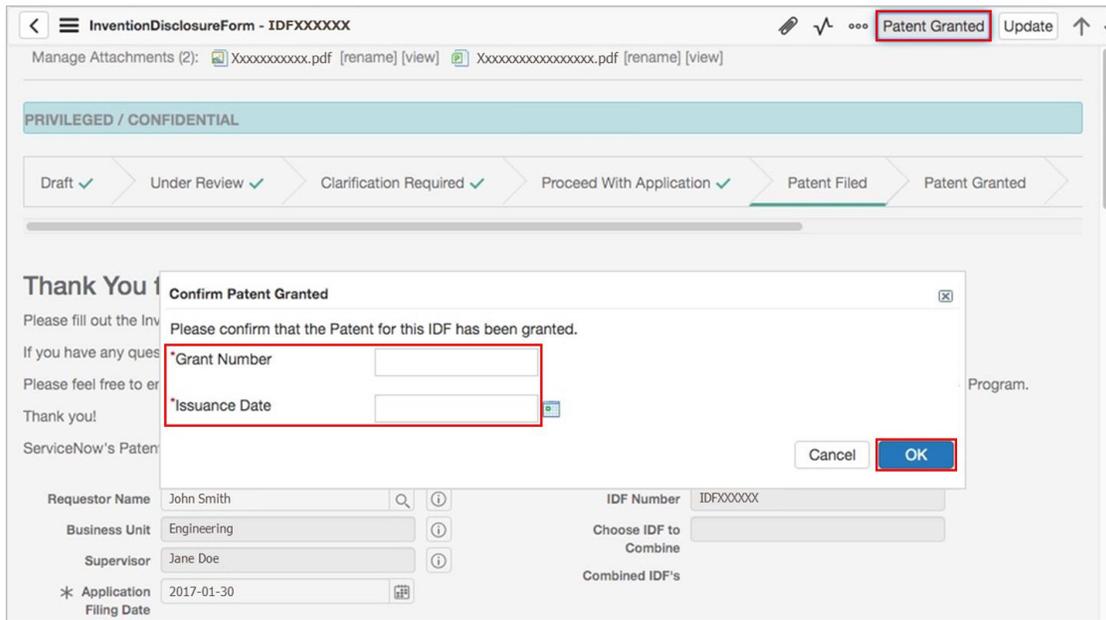
Outside counsel then prepares the patent application and emails a draft to the inventor(s) for review. When the patent application is filed, outside counsel notifies the patent team.

A team member then opens the corresponding invention disclosure form, clicks "Patent Filed," enters the application number and filing date, and clicks "OK."

The screenshot shows the 'InventionDisclosureForm - IDFXXXXXX' interface with the 'Patent Filed' button highlighted in the top navigation bar. Below the navigation bar, there are two PDF attachments listed. A search bar shows 'Exact search match. Click Here to see full search results.' Below this is a 'PRIVILEGED / CONFIDENTIAL' banner. A progress bar shows the current status as 'Patent Filed'. A 'Confirm Patent Filing' dialog box is open, displaying the message 'Please confirm that the Patent for this IDF has been filed.' The dialog box contains two required fields: '*Application Number' and '*Application Filing Date', both highlighted with red boxes. At the bottom of the dialog box, there are 'Cancel' and 'OK' buttons, with the 'OK' button highlighted in red. The background shows a 'Thank You' message and form fields for 'Requestor Name', 'Business Unit' (Engineering), and 'Supervisor' (Jane Doe).

Patent granted

When the patent team is notified that a patent has been granted, a team member opens the corresponding invention disclosure form, clicks "Patent Granted," enters the grant number and issuance date in the pop-up window, and clicks "OK."



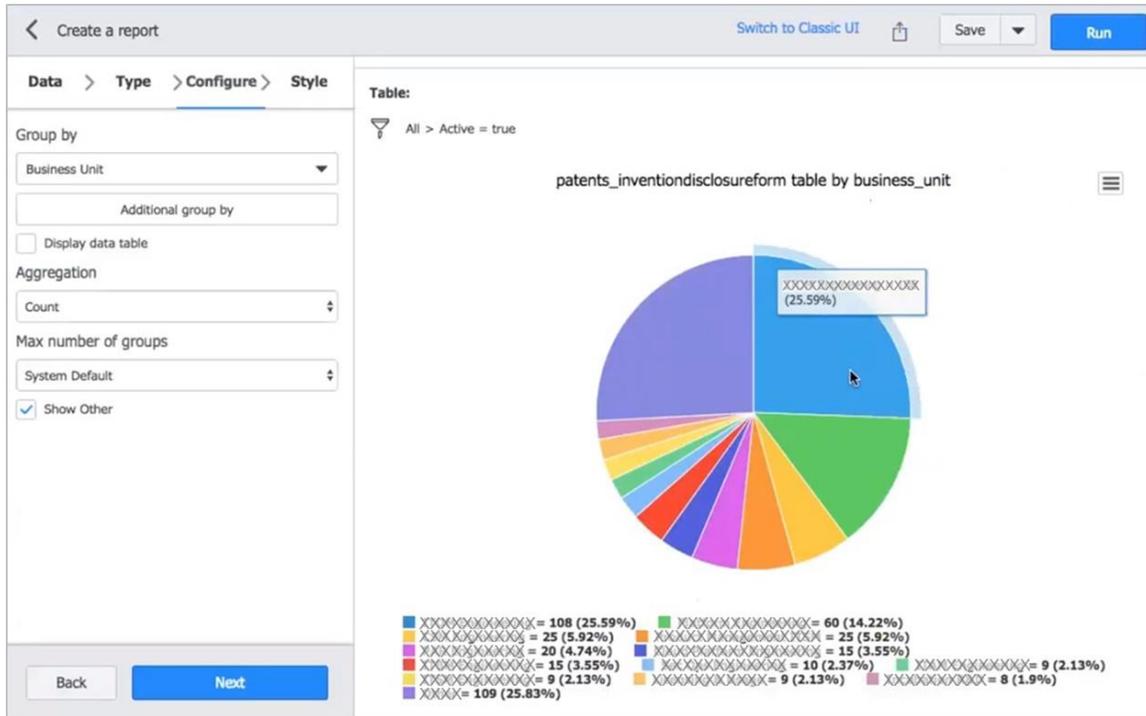
Viewing all invention submissions

Any ServiceNow employee can access the IDF app and view every invention submission in the company. This is intentional to make the patent process as transparent as possible. Clicking on an IDF number will bring up the details of that submission.

The screenshot shows a list view of 'InventionDisclosureForms'. The table has columns for Number, Business Unit, Requestor Name, State, Created, and Created by. A context menu is open over the 'Number' column, showing options like 'Sort (a to z)', 'Sort (z to a)', 'Show Visual Task Board', 'Group By Business Unit', 'Bar Chart', 'Pie Chart', 'Launch Interactive Analysis', 'Configure', 'Export', 'Update Selected', and 'Update All'.

Number	Business Unit	Requestor Name	State	Created	Created by
IDFXXXXXX	XXXXXXXXXXXX	XXXXXXXXXXXX	Combined	2018-09-27 09:53:28	XXXXXXXXXXXX
IDFXXXXXX	XXXXXXXXXXXX	XXXXXXXXXXXX	Under Review	2018-09-27 00:08:16	XXXXXXXXXXXX
IDFXXXXXX	XXXXXXXXXXXX	XXXXXXXXXXXX	Cancelled	2018-09-26 16:56:48	XXXXXXXXXXXX
IDFXXXXXX	XXXXXXXXXXXX	XXXXXXXXXXXX	Proceed With Application	2018-09-26 10:56:14	XXXXXXXXXXXX
IDFXXXXXX	XXXXXXXXXXXX	XXXXXXXXXXXX	Under Review	2018-09-26 05:42:57	XXXXXXXXXXXX
IDFXXXXXX	XXXXXXXXXXXX	XXXXXXXXXXXX	Under Review	2018-09-26 05:42:36	XXXXXXXXXXXX
IDFXXXXXX	XXXXXXXXXXXX	XXXXXXXXXXXX	Proceed With Application	2018-09-26 05:06:12	XXXXXXXXXXXX
IDFXXXXXX	XXXXXXXXXXXX	XXXXXXXXXXXX	Under Review	2018-09-26 04:26:57	XXXXXXXXXXXX
IDFXXXXXX	XXXXXXXXXXXX	XXXXXXXXXXXX	Draft	2018-09-25 17:25:56	XXXXXXXXXXXX
IDFXXXXXX	XXXXXXXXXXXX	XXXXXXXXXXXX	Cancelled	2018-09-25 17:13:15	XXXXXXXXXXXX

The power of the Now Platform enables users to sort and analyze submissions in a variety of ways. For example, this pie chart shows the submissions from each business unit.



About ServiceNow

ServiceNow is changing the way people work. By defining, structuring, and automating work, we are creating a modern service experience for everyone in the enterprise. Our customers have demonstrated that service management isn't just for IT — it is a discipline for every service domain. It's possible now. For more information, visit www.servicenow.com.

Now on Now is about how we use our own ServiceNow solutions to work faster, smarter, and better. With Now on Now, we're achieving true end-to-end digital transformation. To learn more, go to: www.servicenow.com/nowonnow.