

# INPACT™ AND GOALS™ TRADEMARK FILING PACKAGE

## Complete Guide for USPTO Registration

**Prepared for:** Ram Katamaraja, CEO - Colaberry Inc.

**Date:** November 25, 2025

**Purpose:** USPTO Trademark Filing Strategy & Implementation

---

## EXECUTIVE SUMMARY

This package provides comprehensive trademark filing guidance for your two proprietary frameworks:

- **INPACT™** (Instant, Natural, Permitted, Adaptive, Contextual, Transparent)
- **GOALS™** (Governance, Observability, Accessibility, Language, Soundness)

**Recommendation:** File Intent-to-Use (ITU) applications NOW in Classes 41 & 42 **Estimated Cost:**

\$1,400-\$7,400 (depending on DIY vs. attorney) **Timeline:** 8-12 months for smooth applications **Strategic**

**Value:** Protects IP before Q2-Q3 2026 book launch

---

## PART 1: PRELIMINARY TRADEMARK SEARCH RESULTS

### INPACT™ - Search Findings

**Status:** ! MODERATE RISK - Existing commercial use identified

#### Conflicts Identified:

##### 1. Impact Learning ([inpaclearning.com](http://inpaclearning.com))

- Business: Workforce assessment, training facilitation, web-based training
- Industry: Education & Training (Class 41 territory)
- Est. 30+ years in business
- **Risk Level:** MODERATE - Direct overlap in education/training
- **Mitigation:** Your specific use case (AI infrastructure frameworks) differs from general workforce training

##### 2. INPACT Software (Crunchbase listing)

- Business: Restaurant industry operating platform
- Industry: Software/Technology (Class 42 territory)

- Focus: Business intelligence, POS technology
- **Risk Level:** LOW-MODERATE - Different industry vertical
- **Mitigation:** Healthcare focus vs. restaurant focus provides differentiation

### 3. INPACT Grant (Indiana University School of Medicine)

- Context: Medical education curriculum program
- **Risk Level:** LOW - Educational use, not commercial trademark

#### **Overall INPACT™ Assessment:**

- **Likelihood of Approval:** 60-70% without modifications
  - **Recommended Strategy:** File with detailed description emphasizing "AI agent infrastructure" and "data architecture readiness frameworks"
  - **Potential Challenges:** May receive Office Action requiring clarification to distinguish from Inpact Learning
  - **Backup Options:** Consider "INPACT Framework" or "AI-INPACT" if needed
- 

#### **GOALS™ - Search Findings**

**Status:**  HIGH RISK - Common word with existing trademark

#### **Conflicts Identified:**

1. **"YOUR GOALS. OUR EXPERTISE."** - REGISTERED TRADEMARK
  - Owner: TPR Education IP Holdings, LLC
  - Registration Number: 5237392
  - Serial Number: 86238864
  - Classes: 41 (Education) & 42 (Software)
  - Goods/Services: Educational software, test prep materials, training services
  - **Risk Level:** MODERATE - Similar territory but different phrase structure
  - **Mitigation:** "GOALS" alone may be distinguished from phrase mark

2. **Generic/Descriptive Usage:**

- "SMART GOALS" framework (widely used in education - not trademarked)
- "GOALS Framework" appears in multiple educational contexts
- **Risk Level:** HIGH - Generic use could weaken trademark claim

- **Challenge:** USPTO may view "GOALS" as descriptive of goal-setting services

### **Overall GOALS™ Assessment:**

- **Likelihood of Approval:** 40-50% as standalone mark
  - **Recommended Strategy:**
    - File as "GOALS Framework" or "AI-GOALS" for better distinctiveness
    - Emphasize specific application to "operational excellence in AI infrastructure"
    - Provide evidence of secondary meaning through book publication and platform use
  - **Alternative Approaches:**
    - Stylized logo mark incorporating "GOALS" design
    - Consider "GOALS Framework™" throughout book to build brand recognition
- 

### **Search Methodology Used:**

1. USPTO database search (indirect - via web search due to access limitations)
2. Commercial use search across education and software sectors
3. Common law trademark search
4. Industry-specific framework naming conventions
5. Domain name availability check (pending)

### **Key Findings Summary:**

Mark	Existing Conflicts	Risk Level	Recommended Action
INPACT™	2 commercial uses	MODERATE	File with detailed description
GOALS™	1 registered TM + generic use	HIGH	Consider modification or stylization

---

## **PART 2: GOODS & SERVICES DESCRIPTIONS**

### **For INPACT™ Trademark Application**

#### **Class 41 (Education and Entertainment Services)**

##### **Primary Description:**

Educational services, namely, providing training, workshops, seminars, and online courses in the fields of artificial intelligence agent deployment, data infrastructure readiness, and enterprise data architecture; Providing online non-downloadable educational materials in the nature of articles, guides, and assessment tools in the field of AI agent infrastructure; Conducting educational conferences and certification programs in the field of agent-ready data systems; Educational services, namely, developing and providing training materials for enterprise AI readiness assessment.

#### **Alternative Wording (if primary rejected):**

Training services in the field of AI infrastructure optimization; Educational workshops for data architects and technology officers regarding agent deployment frameworks; Providing online educational resources regarding enterprise AI readiness and data architecture modernization.

### **Class 42 (Computer and Scientific Services)**

#### **Primary Description:**

Software as a service (SAAS) services featuring software for assessing data infrastructure readiness for artificial intelligence agent deployment; Providing temporary use of online non-downloadable software for evaluating enterprise data architecture against AI agent requirements; Technology consultation services in the field of enterprise data infrastructure modernization for AI agent deployment; Computer software consulting services in the field of data architecture readiness assessment; Providing online non-downloadable software for scoring and tracking enterprise data infrastructure maturity for AI applications; Platform as a service (PAAS) featuring computer software platforms for assessing organizational readiness for deploying artificial intelligence agents.

#### **Alternative Wording (if primary rejected):**

Consulting services in the field of data infrastructure for AI deployment; Software-as-a-service (SAAS) services featuring AI readiness assessment tools; Technology advisory services related to enterprise data architecture for artificial intelligence applications.

**For GOALS™ Trademark Application****Class 41 (Education and Entertainment Services)****Primary Description:**

Educational services, namely, providing training, workshops, seminars, and online courses in the fields of operational excellence for AI infrastructure, data governance for artificial intelligence systems, and enterprise AI operations management; Providing online non-downloadable educational materials in the nature of operational frameworks, scorecards, and assessment tools for measuring AI infrastructure quality; Conducting educational conferences and certification programs in the field of AI operational discipline; Educational services, namely, developing and providing training materials for measuring and improving operational excellence in AI-ready data systems.

**Alternative Wording (if primary rejected):**

Training services in the field of AI operations management; Educational workshops for data operations teams regarding operational excellence frameworks for AI systems; Providing online educational resources regarding AI infrastructure operational best practices.

**Class 42 (Computer and Scientific Services)****Primary Description:**

Software as a service (SAAS) services featuring software for measuring and tracking operational excellence in AI infrastructure; Providing temporary use of online non-downloadable software for evaluating data governance, observability, accessibility, language processing, and system soundness in AI environments; Technology consultation services in the field of operational discipline for AI-ready data infrastructure; Computer software consulting services in the field of operational excellence frameworks for artificial intelligence deployment; Providing online non-downloadable software for scoring operational maturity across governance, observability, accessibility, language, and soundness dimensions; Platform as a service (PaaS) featuring computer software platforms for continuous monitoring of AI infrastructure operational health.

**Alternative Wording (if primary rejected):**

Consulting services in the field of operational excellence for AI systems;  
Software-as-a-service (SAAS) services featuring operational discipline  
assessment tools for artificial intelligence infrastructure; Technology  
advisory services related to AI operations management and governance.

---

### Key Drafting Principles Applied:

1. **Specificity:** Emphasized "AI agent deployment" and "data infrastructure" to distinguish from general education/software
  2. **Trademark Office Language:** Used USPTO-preferred terminology like "namely," "in the field of," and "services featuring"
  3. **Breadth with Limits:** Comprehensive enough to protect business model but specific enough to avoid rejection
  4. **Current + Future:** Covers both existing book/training and planned AIXcelerator platform
  5. **Distinctiveness:** Language emphasizes unique application to avoid generic/descriptive rejection
- 

## PART 3: RECOMMENDED TRADEMARK ATTORNEYS

### Top-Tier Firms (Full-Service, Premium)

#### 1. Kilpatrick Townsend & Stockton LLP ★ TOP RECOMMENDATION

- **Ranking:** #1 for most U.S. attorneys in 2025 World Trademark Review 1000
- **Recognition:** Gold-level rankings, 35 individually ranked attorneys
- **Expertise:** Technology sector specialist, strong in software/SaaS trademarks
- **Geographic:** 18 U.S. offices, 22 worldwide (including Atlanta, NC, DC)
- **Why Perfect for You:**
  - Recognized leaders in tech trademark strategy
  - Experience with education + technology marks (Class 41 + 42)
  - Can handle book publication + platform development IP needs
- **Estimated Cost:** \$2,000-\$3,500 per mark (including filing fees)
- **Contact:** [www.ktslaw.com](http://www.ktslaw.com) | Atlanta office recommended

### Key Attorneys:

- Ted Davis (Partner) - National leader in enforcement & litigation, prosecution

- Lisa Pearson (Partner) - National leader in enforcement & litigation
- 

## 2. Cantor Colburn LLP

- **Ranking:** Top 10 Trademark Law Firm 2024 (North America - North East)
  - **Expertise:** One of busiest trademark practices in U.S., ranked top for registrations
  - **Client Base:** Entrepreneurial start-ups to Fortune 100 multinationals
  - **Why Good for You:**
    - Strong record with emerging technology companies
    - Experience with complex Class 42 applications
    - Excellent for start-up to scale-up protection
  - **Estimated Cost:** \$2,500-\$4,000 per mark
  - **Contact:** [www.cantorcolburn.com](http://www.cantorcolburn.com)
- 

## 3. Duane Morris LLP

- **Recognition:** 2024 IP Practice Group of the Year (Law360)
  - **Scale:** Manages nearly 20,000 trademarks in 200+ jurisdictions
  - **Client Base:** 1,700+ companies from startups to Fortune 500
  - **Expertise:** Strong in AI-related IP, software, technology
  - **Why Consider:**
    - Experience with AI/ML trademark issues
    - Comprehensive IP strategy (can help with future patent needs)
    - Top 10 firm (North America - North East)
  - **Estimated Cost:** \$2,500-\$4,500 per mark
  - **Contact:** [www.duanemorris.com](http://www.duanemorris.com)
- 

## 4. Mintz IP Law

- **Client Base:** Startups to Fortune 500 (software, technology focus)
- **Network:** Global network across 120+ countries

- **Expertise:** Strategic approach to brand protection, life sciences + tech
  - **Recognition:** 2024 World Trademark Review (WTR) 1000 recognition
  - **Why Consider:**
    - Strong with healthcare + technology convergence
    - Experience scaling from startup to \$400M revenue clients
    - Strategic licensing expertise (relevant for future framework licensing)
  - **Estimated Cost:** \$2,000-\$3,500 per mark
  - **Contact:** [www.mintz.com](http://www.mintz.com)
- 

### Mid-Tier Options (Excellent Quality, More Accessible)

#### 5. Gerben IP (Gerben Law Firm)

- **Specialization:** Trademark-focused boutique
  - **Experience:** 8,000+ trademark registrations, 500+ disputes handled
  - **Founder:** Josh Gerben, nationally recognized trademark attorney
  - **Why Consider:**
    - Specialized focus = deep expertise without big firm overhead
    - Excellent track record with Class 42 (technology services)
    - More accessible pricing than top-tier firms
    - Strong communication and client service reputation
  - **Estimated Cost:** \$1,500-\$2,500 per mark
  - **Contact:** [www.gerbenlaw.com](http://www.gerbenlaw.com) | (703) 349-3280
  - **Best For:** If you want specialized expertise at lower cost
- 

### Budget-Friendly Options (Competent, Cost-Effective)

#### 6. LegalZoom Trademark Services

- **Model:** Online + attorney review hybrid
- **Cost:** \$199-\$499 + USPTO fees
- **Pros:** Most affordable, decent for straightforward applications
- **Cons:** Less strategic guidance, template-driven

- **Best For:** If budget is primary concern and marks are strong

## 7. Trademark Engine

- **Model:** Flat-fee online filing with attorney support
  - **Cost:** \$99-\$199 + USPTO fees
  - **Pros:** Very affordable, faster than DIY
  - **Cons:** Limited custom strategy, best for simple marks
  - **Best For:** Secondary protection or less critical marks
- 

## RECOMMENDED APPROACH FOR YOUR SITUATION:

### Strategy 1: Premium Protection (RECOMMENDED)

- **Firm:** Kilpatrick Townsend & Stockton
- **Why:** Your frameworks are core IP for book + platform + consulting business
- **Investment:** \$4,000-\$7,000 total (both marks, both classes)
- **Value:** Strategic counsel on both marks, Office Action response included, long-term relationship

### Strategy 2: Specialized Boutique

- **Firm:** Gerben IP
- **Why:** Specialized expertise at 40-50% cost savings vs. top tier
- **Investment:** \$3,000-\$5,000 total (both marks, both classes)
- **Value:** Focused attention, strong Class 42 experience, excellent communication

### Strategy 3: Hybrid Approach

- **INPACT™:** Premium firm (higher risk, more strategic value)
  - **GOALS™:** Mid-tier or boutique (secondary framework)
  - **Investment:** \$3,000-\$5,500 total
  - **Value:** Allocates budget to highest-risk/highest-value mark
- 

## Questions to Ask During Consultations:

1. **Experience:** "How many Class 41 and 42 trademark applications have you filed for framework-based businesses?"

2. **Strategy:** "Given the existing 'Impact Learning' use, what's your strategy to distinguish our mark?"
  3. **GOALS Challenge:** "How would you approach the descriptiveness concern with 'GOALS'?"
  4. **Timeline:** "What's realistic for approval given Q2-Q3 2026 book launch?"
  5. **Office Actions:** "What percentage of your applications receive Office Actions? Are responses included in your fee?"
  6. **Maintenance:** "What ongoing services do you provide post-registration?"
  7. **Portfolio Strategy:** "Should we consider additional protection like stylized logos or taglines?"
  8. **International:** "What's your advice on international protection given our U.S. market focus?"
- 

## PART 4: COMPLETE USPTO FILING CHECKLIST

### PRE-FILING PHASE (Week 1-2)

#### Legal Entity & Ownership Setup

##### Confirm Legal Owner

- Corporation name: Colaberry Inc.
- State of incorporation: \_\_\_\_\_
- EIN: \_\_\_\_\_
- Business address: \_\_\_\_\_

##### Verify Corporate Good Standing

- Order certificate of good standing from state
- Ensure all corporate filings are current
- Confirm business address is up-to-date

##### Gather Ownership Documentation

- Articles of incorporation
- Operating agreement or bylaws
- Proof of business registration
- W-9 form for IRS verification

#### Evidence of Use / Intent-to-Use Decision

##### Current Use Evidence (if filing 1(a) - Use in Commerce)

- Screenshots of frameworks in use on Colaberry website
- Training materials featuring marks

- Marketing materials with marks
- Dates of first use in commerce
- Dates of first use anywhere

**Intent-to-Use Basis (RECOMMENDED for you - 1(b))**

- Document business plan showing planned use
- Book publication timeline (Q2-Q3 2026)
- Platform development roadmap
- Training program development plan
- Note: Will need to file Statement of Use (SOU) before registration

### **Comprehensive Search & Clearance**

**Professional Trademark Search (\$300-\$800)**

- Order from Thomson CompuMark, Corsearch, or similar
- Full USPTO database search
- State trademark databases
- Common law use search
- Domain name availability
- Social media handle availability

**Search Report Analysis**

- Review all similar marks
- Assess likelihood of confusion
- Document clearance decision
- Consider search firm opinion letter

**Attorney Consultation #1**

- Present search results
- Discuss clearance strategy
- Get opinion on registrability
- Decide on mark modifications if needed

### **Goods & Services Refinement**

**Draft Specific Descriptions**

- Use descriptions from Part 2 of this document
- Customize based on current business activities
- Plan for future business expansion
- Verify USPTO Trademark ID Manual acceptable language

**Class Selection Confirmation**

- Class 41: Education/Training ✓
- Class 42: Software/Consulting ✓
- Consider Class 9 if downloadable software planned
- Consider Class 16 if printed materials planned

**Specimen Preparation**

**For Intent-to-Use (Required Later)**

- Prepare examples of marks in use for Statement of Use
- Website screenshots showing marks with services
- Training materials header with mark
- Marketing materials advertising services
- Must show mark + description of services offered

---

**FILING PHASE (Week 3-4)**

**Application Preparation**

**Create USPTO.gov Account**

- Register at uspto.gov
- Set up TEAS (Trademark Electronic Application System) access
- Save login credentials securely

**Select Filing Option**

TEAS Plus: \$250/class (RECOMMENDED - cheapest, stricter requirements)

TEAS Standard: \$350/class (more flexibility)

Note: Must choose pre-approved wording for TEAS Plus

**Complete Application Form for INPACT™**

- Mark: INPACT
- Mark type: Standard character mark (or design if logo)
- Filing basis: 1(b) Intent-to-Use

- Owner: Colaberry Inc.
- Owner address: \_\_\_\_\_
- Correspondent: Attorney or self
- Goods/Services: Use descriptions from Part 2
- Classification: Class 41 & 42

**Complete Application Form for GOALS™**

- Mark: GOALS (or GOALS Framework)
- Mark type: Standard character mark (or design if logo)
- Filing basis: 1(b) Intent-to-Use
- Owner: Colaberry Inc.
- Owner address: \_\_\_\_\_
- Correspondent: Attorney or self
- Goods/Services: Use descriptions from Part 2
- Classification: Class 41 & 42

### **Payment Preparation**

**Calculate Total Fees**

- INPACT™ - Class 41: \$250
- INPACT™ - Class 42: \$250
- GOALS™ - Class 41: \$250
- GOALS™ - Class 42: \$250
- **Total USPTO Fees:** \$1,000 (TEAS Plus)

**Payment Method Setup**

- Credit card authorization
- Deposit account setup (if attorney filing)
- Backup payment method

### **Final Review Before Submission**

**Accuracy Check**

- Owner name exactly matches corporate records
- Owner address is current and deliverable

- Email address is monitored regularly
- Goods/services descriptions are accurate
- Class selections are correct

**Attorney Review** (if using attorney)

- Full application review
- Specimen review (if 1(a))
- Strategy confirmation
- Office Action response plan

**File Applications**

- Submit INPACT™ application
  - Submit GOALS™ application
  - Save confirmation pages
  - Note serial numbers
  - Save filing receipts
- 

## **POST-FILING PHASE (Months 1-3)**

### **Immediate Actions (Week 1 after filing)**

**Record Filing Information**

- Serial number(s): \_\_\_\_\_
- Filing date(s): \_\_\_\_\_
- Confirmation number(s): \_\_\_\_\_
- Store all receipts and confirmations

**Set Calendar Reminders**

- 3-4 months: Check for examining attorney assignment
- 6 months: Check application status
- Statement of Use deadline tracking (if ITU)

**Monitor Email**

- Check email listed on application daily
- Mark uspto.gov emails as "not spam"
- Create folder for trademark correspondence

## **Trademark Status Monitoring**

### **Weekly Status Checks (Months 1-3)**

- Check TSDR (Trademark Status & Document Retrieval)
- URL: tsdr.uspto.gov
- Enter serial number
- Look for status changes

### **Document All USPTO Actions**

- Office action received: Date \_\_\_\_\_
  - Publication date: \_\_\_\_\_
  - Opposition period start: \_\_\_\_\_
  - Opposition period end: \_\_\_\_\_
- 

## **EXAMINATION PHASE (Months 3-6)**

### **Examining Attorney Assignment**

#### **Initial Review Period**

- Wait for examining attorney assignment (typically 3-4 months)
- Review examining attorney's name in TSDR
- Research attorney's typical Office Action patterns (optional)

### **Office Action Response (if received)**

#### **Analyze Office Action**

- Identify all refusals
- Note response deadline (typically 6 months, but earlier action is better)
- Categorize issues:
  - Likelihood of confusion with existing mark
  - Descriptiveness / genericness
  - Identification of goods/services issues
  - Specimen issues (if 1(a))
  - Other technical issues

#### **Develop Response Strategy**

- Consult attorney if not already retained
- Gather evidence of distinctiveness

- Prepare arguments for refusal
- Consider amendments to goods/services

**Common INPACT™ Office Action Scenarios:**

- **Scenario 1:** Likelihood of confusion with "Impact Learning"
  - Response: Argue different industries, different services
  - Provide evidence: Healthcare/AI focus vs. general training
  - Consider: Amend description to emphasize AI/data focus
- **Scenario 2:** Specimen rejection (if 1(a))
  - Response: Provide better specimen showing mark in commerce
  - Ensure: Mark + services clearly visible
- **Scenario 3:** Goods/services too broad
  - Response: Narrow description to actual business
  - Clarify: Specific AI infrastructure focus

**Common GOALS™ Office Action Scenarios:**

- **Scenario 1:** Descriptiveness refusal (HIGH LIKELIHOOD)
  - Response: Argue acquired distinctiveness through use
  - Evidence: Book publication, training programs, platform usage
  - Alternative: Add disclaimer for descriptive portions
- **Scenario 2:** Likelihood of confusion with "YOUR GOALS. OUR EXPERTISE."
  - Response: Argue different commercial impression
  - Note: Different phrase structure, different context
- **Scenario 3:** Genericness refusal
  - Response: Show specific application to AI operations
  - Evidence: Technical usage distinct from generic "goals"

**Prepare Response Documents**

- Response to Office Action form
- Arguments and legal authorities
- Evidence (declarations, specimens, usage examples)
- Proposed amendments to application

**File Response**

- Submit via TEAS Response

- Within deadline (6 months from Office Action date)
- Save confirmation
- Monitor for examiner's response (typically 2-3 months)

## **Approval for Publication**

### **Receive Approval Notice**

- Review Notice of Publication
  - Verify all information is correct
  - Note publication date
- 

## **PUBLICATION & OPPOSITION PHASE (Months 6-8)**

### **Official Gazette Publication**

#### **Publication in Official Gazette**

- Date published: \_\_\_\_\_
- 30-day opposition period begins
- Mark available for public opposition

#### **Monitor for Opposition**

- Check TSDR weekly during 30-day period
- Watch for notices of opposition
- If opposition filed: Retain experienced trademark litigator

#### **Prepare for Potential Opposition**

- Document all evidence of use
- Gather evidence of no confusion
- Research opposer if opposition filed

## **If Intent-to-Use (1(b)) - Statement of Use Required**

#### **Track Statement of Use Deadline**

- Deadline: 6 months after Notice of Allowance
- Set reminders at 4, 5, and 5.5 months

#### **Prepare for Statement of Use**

- Begin using marks in commerce
- Create specimens showing use

- Document date of first use
- Fee: \$100 per class (\$400 total for both marks)

**Extension Requests (if needed)**

- Can request up to 5 extensions (36 months total)
  - Each extension: \$125-\$225 per class
  - Must show good faith intent to use
- 

## **REGISTRATION PHASE (Months 8-12)**

### **Notice of Allowance (ITU) or Registration (1(a))**

**Receive Notice**

- For ITU: Notice of Allowance (must then file SOU)
- For 1(a): Certificate of Registration

### **Statement of Use Filing (ITU only)**

**Prepare SOU Submission**

- Specimen showing mark in use for each class
- Date of first use in commerce for each class
- Date of first use anywhere for each class
- Verification statement (signed by applicant)
- Fee: \$100 per class

**Acceptable Specimens:**

- Website screenshots showing mark + services
- Marketing materials advertising services
- Training program materials
- Software interface showing mark
- Must show mark as used to identify services

**File Statement of Use**

- Submit via TEAS SOU
- Within deadline
- Include all required specimens
- Pay fees (\$100/class)

## **Final Examination of SOU**

### **Wait for Approval**

- USPTO reviews specimens (2-3 months)
- May issue Office Action if specimens insufficient
- Respond to any Office Actions

## **Registration Certificate**

### **Receive Certificate**

- Download PDF from USPTO
  - Print and store original
  - Update all materials to ® symbol
  - Registration number: \_\_\_\_\_
  - Registration date: \_\_\_\_\_
- 

## **POST-REGISTRATION MAINTENANCE**

### **Immediate Post-Registration (Month 1)**

#### **Update Company Materials**

- Change ™ to ® on all materials
- Update website
- Update marketing materials
- Update training materials
- Update book manuscript

#### **Record Registration**

- Store certificate in secure location
- Add to insurance policy (if applicable)
- Note in corporate records
- Update IP portfolio documentation

#### **Set Maintenance Reminders**

- Year 5-6: Section 8 & 15 filings
- Year 9-10: Renewal
- Every 10 years thereafter: Renewals

## **Section 8 Declaration (Years 5-6)**

### **Prepare Section 8**

- Required: Between years 5-6 after registration
- Purpose: Declare continued use of mark
- Specimens: One specimen per class showing current use
- Fee: ~\$225 per class
- Deadline reminder: Set for 4.5 years after registration

### **Section 15 Declaration (Optional but RECOMMENDED)**

- Filed with Section 8 (same time window)
- Declares incontestable status
- Fee: ~\$200
- Benefits: Stronger legal protection

## **Renewal (Years 9-10 and every 10 years)**

### **First Renewal**

- Required: Between years 9-10 after registration
- Specimens: Current use specimens
- Fee: ~\$300-\$400 per class
- Deadline reminder: Set for 8.5 years after registration

### **Subsequent Renewals**

- Every 10 years after registration
- Same requirements as first renewal
- Maintain vigilance on deadlines

## **Ongoing Protection**

### **Monitor for Infringement**

- Set up Google Alerts for mark names
- Monitor USPTO for confusingly similar filings
- Review competitor marketing materials
- Document any potential infringement

### **Enforcement Actions**

- Send cease & desist letters when appropriate

- Consider litigation for serious infringement
- Document all enforcement actions

**License Management**

- Record licenses with USPTO if sublicensing
  - Maintain quality control over licensed use
  - Review license agreements annually
- 

## BUDGET TRACKING WORKSHEET

### USPTO Fees (Actual Costs)

Item	Quantity	Unit Cost	Total
TEAS Plus filing (INPACT™)	2 classes	\$250	\$500
TEAS Plus filing (GOALS™)	2 classes	\$250	\$500
Statement of Use (INPACT™)	2 classes	\$100	\$200
Statement of Use (GOALS™)	2 classes	\$100	\$200
<b>Total USPTO Fees</b>			<b>\$1,400</b>

### Attorney Fees (Estimated)

Service	Cost Range
Professional search (2 marks)	\$600-\$1,600
Application preparation & filing (2 marks, 4 classes)	\$1,500-\$4,000
Office Action response (if needed, per mark)	\$800-\$2,500
Statement of Use filing (2 marks)	\$400-\$1,200
<b>Total Attorney Fees Range</b>	<b>\$3,300-\$9,300</b>

### Total Investment

Scenario	USPTO	Attorney	Total
DIY Filing	\$1,400	\$0	\$1,400
With Boutique Attorney	\$1,400	\$3,300-\$5,000	\$4,700-\$6,400
With Premium Firm	\$1,400	\$5,000-\$9,300	\$6,400-\$10,700

---

## CRITICAL DEADLINES TRACKER

### INPACT™

Filing Date: \_\_\_\_\_

- Office Action Deadline (if applicable): \_\_\_\_\_ (6 months from OA date)
- Notice of Allowance Date: \_\_\_\_\_
- Statement of Use Deadline: \_\_\_\_\_ (6 months from NOA)
- Extension Request Deadlines: \_\_\_\_\_, \_\_\_\_\_, \_\_\_\_\_ (if needed)
- Registration Date: \_\_\_\_\_
- Section 8/15 Filing Window: \_\_\_\_\_ to \_\_\_\_\_ (years 5-6)
- First Renewal Window: \_\_\_\_\_ to \_\_\_\_\_ (years 9-10)

## GOALS™

- Filing Date: \_\_\_\_\_
  - Office Action Deadline (if applicable): \_\_\_\_\_ (6 months from OA date)
  - Notice of Allowance Date: \_\_\_\_\_
  - Statement of Use Deadline: \_\_\_\_\_ (6 months from NOA)
  - Extension Request Deadlines: \_\_\_\_\_, \_\_\_\_\_, \_\_\_\_\_ (if needed)
  - Registration Date: \_\_\_\_\_
  - Section 8/15 Filing Window: \_\_\_\_\_ to \_\_\_\_\_ (years 5-6)
  - First Renewal Window: \_\_\_\_\_ to \_\_\_\_\_ (years 9-10)
- 

## RISK MITIGATION STRATEGIES

### For INPACT™

**Risk:** Likelihood of confusion with "Inpact Learning"

- **Mitigation 1:** Emphasize AI/data infrastructure focus in description
- **Mitigation 2:** Provide evidence of different channels/customers
- **Mitigation 3:** Consider coexistence agreement (unlikely but possible)
- **Backup Plan:** Amend to "AI-INPACT" or "INPACT Framework"

**Risk:** Office Action requiring clarification

- **Mitigation:** Have detailed evidence package ready
- **Timeline:** Budget 3-6 additional months
- **Cost:** Budget \$800-\$2,500 for response

### For GOALS™

**Risk:** Descriptiveness refusal (HIGH PROBABILITY)

- **Mitigation 1:** File with detailed acquired distinctiveness evidence
- **Mitigation 2:** Emphasize specific technical application

- **Mitigation 3:** Consider stylized mark or design mark
- **Backup Plan:** Amend to "GOALS Framework" or "AI-GOALS"

**Risk:** Likelihood of confusion with "YOUR GOALS. OUR EXPERTISE."

- **Mitigation:** Argue different commercial impression and service focus
  - **Timeline:** May add 6-9 months to process
  - **Cost:** May require additional attorney time
- 

## **DOCUMENT LIBRARY CHECKLIST**

Store all documents securely (both physical and digital backups):

### **Corporate Documents**

- Articles of Incorporation
- Operating Agreement/Bylaws
- Certificate of Good Standing
- Business licenses
- W-9 Form

### **Search & Clearance**

- Professional search report (INPACT™)
- Professional search report (GOALS™)
- Attorney opinion letters
- Clearance analysis documents

### **USPTO Filings**

- INPACT™ application confirmation
- GOALS™ application confirmation
- All Office Action notices
- All responses filed
- Notice of Allowance
- Certificate of Registration

### **Evidence of Use**

- Specimens used for Statement of Use
- Website archives showing use
- Marketing materials
- Training materials

Book excerpts showing mark use

## Maintenance Records

- Section 8 & 15 filings
  - Renewal filings
  - All fee receipts
  - Correspondence with USPTO
- 

## INTEGRATION WITH BOOK PUBLISHING TIMELINE

**Your Book Timeline:** Q2-Q3 2026 publication

### Strategic Trademark Filing Timeline:

- **NOW (Nov 2025):** File ITU applications
- **Feb-Mar 2026:** Expect Office Actions (if any)
- **Apr-May 2026:** Respond to Office Actions
- **May-Jun 2026:** Approval for publication (optimistic)
- **Jun-Jul 2026:** 30-day opposition period
- **Q2-Q3 2026:** Book publishes (marks established in market)
- **Aug-Sep 2026:** File Statement of Use (shows use through book/platform)
- **Oct-Dec 2026:** Registration certificate received

**KEY BENEFIT:** Filing NOW establishes priority date, allowing you to use <sup>TM</sup> symbol throughout book writing/publication while applications are pending.

---

## CONTACT INFORMATION FOR NEXT STEPS

### USPTO Resources

- Main website: uspto.gov
- TEAS filing system: uspto.gov/trademarks/apply
- Status check: tsdr.uspto.gov
- Trademark Assistance Center: 1-800-786-9199 | [TrademarkAssistanceCenter@uspto.gov](mailto:TrademarkAssistanceCenter@uspto.gov)

### Recommended Next Call

**Kilpatrick Townsend & Stockton LLP**

- Website: ktslaw.com
  - Request: "Initial trademark consultation for two framework marks in Classes 41 & 42"
  - Mention: Technology/education sector, book publication + SaaS platform
  - Prepare: This document + your Colaberry Trademark Codex
- 

## CONCLUSION & RECOMMENDED IMMEDIATE ACTIONS

### This Week:

1.  **Review this document completely**
2.  **Schedule consultations with 2-3 attorneys** (Kilpatrick, Gerben IP, Cantor Colburn)
3.  **Gather corporate documentation** (incorporation papers, certificates)
4.  **Document current use** (website screenshots, training materials) for evidence file

### Next 2 Weeks:

5.  **Select attorney** (or decide on DIY approach)
6.  **Order professional trademark searches** (\$600-\$800 for both marks)
7.  **Refine goods/services descriptions** based on attorney input
8.  **Finalize filing strategy** (both marks simultaneously or phased)

### Within 1 Month:

9.  **File USPTO applications** for both INPACT™ and GOALS™
  10.  **Begin using ™ symbol** in all materials (book manuscript, website, training)
  11.  **Set up trademark monitoring** (Google Alerts, USPTO watching services)
- 

**The cost of not filing:** Risk of someone else filing first, loss of priority date, inability to use ® symbol at book launch, weakened enforcement rights.

**The value of filing now:** Priority date protection, ability to use ™ during book writing, stronger position at publication, foundation for platform/consulting business.

---

## APPENDIX: ADDITIONAL RESOURCES

### Useful USPTO Resources

- **Trademark Manual of Examining Procedure (TMEP):** Official examination guidelines
- **Trademark ID Manual:** Pre-approved goods/services descriptions

- **Basic Facts About Trademarks:** uspto.gov/trademarks/basics
- **Trademark Electronic Search System:** tmsearch.uspto.gov/search/search-information

## Educational Materials

- **USPTO Trademark Basics Boot Camp:** Free webinar series
- **American Intellectual Property Law Association (AIPLA):** aipla.org
- **International Trademark Association (INTA):** inta.org

## Monitoring Services

- **Google Alerts:** Free monitoring for trademark mention
  - **TrademarkNow:** Paid comprehensive monitoring
  - **Corsearch:** Professional watching service
- 

**Document Version:** 1.0

**Last Updated:** November 25, 2025

**Prepared By:** Claude (Anthropic AI)

**For:** Ram Katamaraja, Colaberry Inc.

---

**DISCLAIMER:** This document provides general information and recommendations based on publicly available resources. It is not legal advice. Trademark law is complex and fact-specific. You should consult with a licensed trademark attorney before making filing decisions. The search results presented are based on preliminary web searches and should be verified through comprehensive professional trademark search reports.

---

**NEXT STEP:** Schedule attorney consultations this week. Time is of the essence given your Q2-Q3 2026 publication timeline. Filing now gives you maximum protection and flexibility.

Good luck with your trademark filings! Your frameworks deserve strong legal protection to match their strategic value. 