

INPACT™ AND GOALS™ TRADEMARK FILING PACKAGE

Complete Guide for USPTO Registration

Prepared for: Ram Katamaraja, CEO - Colaberry Inc.

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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 (inpactlearning.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 Impact Learning
 - **Backup Options:** Consider "INPACT Framework" or "AI-INPACT" if needed
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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
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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 | Atlanta office recommended

Key Attorneys:

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

- Lisa Pearson (Partner) - National leader in enforcement & litigation
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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
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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
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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
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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 | (703) 349-3280
 - **Best For:** If you want specialized expertise at lower cost
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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
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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
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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?"
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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: _____
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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 "Inpact 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: _____
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POST-REGISTRATION MAINTENANCE

Immediate Post-Registration (Month 1)

☐ **Update Company Materials**

- Change TM 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
Total USPTO Fees			\$1,400

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
Total Attorney Fees Range	\$3,300-\$9,300

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)
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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
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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 TM 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





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

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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. 🎯