

# INPACT™ AND GOALS™ TRADEMARK FILING PACKAGE

## Complete Guide for USPTO Registration

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

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## 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

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## 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 Inpact 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.

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**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.

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## **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.

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### **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.

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### **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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