

INPACT™ AND GOALS™ TRADEMARK FILING PACKAGE

Complete Guide for USPTO Registration

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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 (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
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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 GOALSTM 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
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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
GOALSTM	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 GOALSTM 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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