The Honest Guide to Patent Portfolio Management

Spreadsheet, legacy IPMS, or ArcPrime: a straight comparison for IP teams

Most teams don't need fancy software until they suddenly do. If you're a solo in house patent counsel, or a founder watching the patents while you also run a company, the honest answer is that a spreadsheet might be exactly right for you today. It might also be the thing quietly putting your portfolio at risk.

This is a straight comparison of three ways to manage a patent portfolio: a spreadsheet, whether a plain Excel file or a shared Google Sheet, a legacy IP management system like Anaqua, IPfolio, or Questel, and ArcPrime. We've tried to be fair to the others, because the worst outcome for everyone is buying software you don't need yet, or clinging to a spreadsheet long after it stopped protecting you.

We'll cover when a spreadsheet still works for you and where it breaks, the signals that you've outgrown it, what a legacy IP management system gets right and what it costs you, and where ArcPrime fits. Along the way you'll find a short audit you can score yourself on, a comparison table, and a set of questions you can take to any vendor to learn how they'll handle the things that actually trip up a switch: moving your data, keeping your patent families intact, and what it all really costs. If you finish reading and decide you don't need to change anything, that's a fine outcome too.

When a spreadsheet is genuinely fine

Managing patents in a spreadsheet gets a bad reputation it doesn't always deserve. For a lot of small teams, a clean Excel file is the right tool, and there's no shame in it.

If your portfolio is small, say a handful of cases up to maybe a few dozen, and one person owns all of it, a spreadsheet can work for a long time. You can see everything on one screen. You know every case by heart. The deadlines you care about fit in a column, and you check that column often enough that nothing slips. When the data lives in one head and the volume is low, the overhead of real software buys you very little.

A spreadsheet is also cheap, immediate, and yours. No procurement, no onboarding, no vendor. You can reshape it on a Tuesday afternoon because your portfolio is small enough to hold in memory. For a founder who filed a few provisionals and wants one place to note filing dates and law firm contacts, that's often all the system the moment requires. Before you scale up, try a quiet test of your own. Picture your portfolio without looking at the file, and ask whether you can name every case and its next deadline from memory. If you can, a spreadsheet still fits you well. If even one made you pause, your spreadsheet may be near its limit.

Who genuinely fits here: one person, a small set of cases, few hard deadlines, and a portfolio quiet enough that you're not lying awake about any of it. Where it quietly fails is the moment the volume passes what one memory can hold, which tends to happen gradually and without an announcement. The real cost of a spreadsheet isn't money. It's the risk that lives in the gap between what you think is covered and what actually is.

Stay here if your portfolio is small, single owner, and low on hard deadlines, and the tracking still feels effortless. Move on if you've started checking the same dates more than once because you don't quite trust the file.

> **If this sounds like you: You glance at the sheet, recognize every row, and close it without a second thought. For where you are right now, the spreadsheet is doing its job, and there's nothing to fix. Feel comfortable staying with it until it can no longer keep up.**

The honest signal to watch for usually isn't a feature you're missing. It tends to be the first night you lie awake unsure whether a deadline is covered.

Most teams reach for the same next step when one file stops being enough: they share it. Moving from a private file to a shared Google Sheet is the natural progression, and for a while it's a genuine upgrade over a spreadsheet emailed back and forth. The strength is right there in the name. It's shared. Several people can look at the same Google Sheets patent tracker at once, edits show up live, and you stop wondering whether you're working from the latest version. For a small team that just needs everyone seeing the same list, that's real value, and it's free. So a shared Sheet works for the same reason a private one does, just with more eyes on it: the job is shared visibility into a flat list. A few people, a manageable set of cases, a column for the next deadline. If that's the whole problem, a Sheet solves it well. Be honest about where it breaks down, though. Think back to the last time two people edited the tracker in the same week. Did you end up confident the result was right, or did you quietly go back and check their cells against what you remembered?

A shared Sheet breaks in the same four places every time: patent family relationships, renewal tracking, board reporting, and the audit trail.

Patent family relationships

A portfolio isn't a flat list. It's a set of families: a priority application, its continuations and divisionals, foreign counterparts, all tied together. A spreadsheet row can't hold that shape. People fake it with color coding and naming conventions, and it works until the person who invented the convention goes on vacation. The relationships that actually drive strategy are exactly what a Sheet can't represent.

Renewal and maintenance fee tracking

Maintenance fees and foreign annuities arrive on schedules that don't care about your calendar. A Sheet will hold a date, but it won't warn you, it won't escalate, and it won't tell you which renewals are even worth paying. Missed deadline risk is the quiet danger here, and a Sheet does nothing to lower it.

Board and GC reporting

When your GC or board asks what the portfolio looks like, a tab of raw rows isn't an answer. You end up rebuilding a summary by hand every time the question comes up, and as you hold more and more patent data in your head, things start to slip through the cracks.

Audit trail

Anyone with edit access can change a cell. A Sheet does keep a version history, but it is buried in a menu and built for documents, not for proving a patent date was tracked the way a real docket needs. For something as consequential as a patent docket, that is a serious gap. The day you need to prove a date was tracked, a docket grade record isn't there. If a renewal lapsed next month, how would you find out, and when? If the honest answer is whenever someone happened to open the right tab, that may be a sign you're outgrowing it.

Who genuinely fits a shared Sheet: a couple of people who mostly need to see the same list, with a portfolio still small enough that the four gaps above stay theoretical. Where it quietly fails is the day one of those gaps stops being theoretical, usually a missed renewal or a board question you can't answer fast. The real cost is the same as a plain spreadsheet's, plus a false sense of safety, because sharing feels like a system even though it isn't one.

Stay here if shared visibility into a flat list is the whole job and you're not yet hitting any of the problems we just reviewed. Move on if families, renewals, reporting, or audit trail have started to matter and the Sheet keeps coming up short.

> **If this sounds like you:** You've started adding tabs, color codes, and a legend nobody else fully understands. When a sharing tool needs that much scaffolding to hold a docket, it's telling you what it can't do on its own.

None of this means a Google Sheet is bad. A Sheet is a sharing tool, and patents eventually need a docketing system.

When you've outgrown it

You don't usually decide you've outgrown a spreadsheet. You notice it. The signals are consistent, and if more than one sounds familiar, you're already past the spreadsheet stage.

The first is missed deadline anxiety. You double check the same dates over and over, and you still don't feel sure. That feeling is information. It means the volume has passed what one person plus a spreadsheet can reliably hold. It helps to put a number to it. How many times this quarter did you reopen the tracker just to make sure a deadline was really covered, not to do work but only to reassure yourself? Count honestly. The number is a measurement of trust, and trust is the thing a good system gives back to you.

The second is that nobody can get a portfolio view. The GC asks how many active assets you have in a given area, or what's up for renewal next quarter, and the honest answer is that you'll have to go build it. A question that should take a minute takes an afternoon.

The third is renewals made by inertia. You're paying maintenance fees because the date came up, not because anyone decided the patent still earns its keep. Over a few years that's real money spent protecting things you'd have let go if anyone had asked the question. Do the sums. Of the maintenance fees you paid in the last year, how many were a real decision and how many were just the calendar telling you to pay? If you can't sort them, you're likely paying to keep assets you'd have happily let go.

The fourth is time. You're spending hours on manual tracking, copying dates, reconciling versions, rebuilding the same summary. That's time not spent on the actual judgment calls only you can make.

> **If this sounds like you:** You're rebuilding the same board report by hand every quarter. The work is real and you're doing it well. The spreadsheet has simply stopped carrying its share, and that's the thing that changed, not you.

Ask who else can answer what's in our portfolio when you're on vacation. If the honest answer is no one, you don't yet have a system, only a portfolio that lives in one person's memory, which is a single point of failure. Outgrowing a spreadsheet isn't a failure. It's a sign the portfolio got valuable enough to deserve better. The question becomes what better looks like, and that's where the next two options come in.

Legacy IPMS: powerful, but

Legacy IP management systems exist for good reasons. Anaqua, IPfolio, Questel, CPA, MaxVal, and the rest solve the problems a spreadsheet can't. They model patent families properly. They track renewals and maintenance fees with real deadline logic. They keep an audit trail. For a large IP department running thousands of assets, that structure is the point, and it earns its place.

To be fair about who a legacy IPMS genuinely fits: A large department, a docketing team to run it, thousands of assets, and the budget and patience for a long setup. If that's you, these systems are mature and capable, and the structure is worth it.

The honest part is what they cost you beyond the invoice.

Implementations are long. Standing up a legacy IPMS is often measured in months, with data mapping, configuration, and training before you get value out the other side. That's a lot of runway spent on setup before you see value.

Migration is the thing people quietly dread. Getting years of data out of a spreadsheet, or worse, out of one legacy system and into another, is the fear that keeps teams frozen on tools they've already outgrown. The dread is rational. Migrations have a reputation for being painful. The fear deserves naming plainly. Is part of the reason you haven't switched simply that moving the data feels worse than living with the current pain? If so, you're letting a one time fear set a permanent cost.

And these systems were built for big departments. The workflows, the pricing, the assumption that you have a docketing team. A solo counsel or a founder often ends up paying for scale they don't have and complexity they didn't want. If you've been searching for an Anaqua alternative or an IPfolio alternative because the platform feels too heavy for your team, that instinct is worth trusting.

> **If this sounds like you:** You're being quoted a six figure setup and a multi month timeline to track a portfolio one person manages. A tool priced and built for a department of fifty was never going to fit a lean team, and the mismatch is the quote's problem, not yours.

Every legacy system has the same deepest issue, regardless of brand. They record. They hold your data faithfully and they track your deadlines, but they don't help you decide. They'll tell you a renewal is due. They won't tell you whether the patent is worth renewing. You pay to track, and the research needed to make the decisions is still entirely on you.

Stay here if you're a big department with a docketing team and the structure earns its keep. A legacy IPMS is the right home for a portfolio that mostly needs to be tracked and recorded at scale. Look elsewhere if a system of record isn't all you need. If you want help deciding what to keep and what to prune, not just a place to store the dates. If you're tired of inventions leaking out of Slack, Jira, and email before they're ever captured. If continuations slip past their window because no one flagged them in time. If your board reporting is rebuilt by hand every quarter, and your AI tools can't see your portfolio at all. A legacy system won't close any of those gaps, because it was built to record, not to do the work.

Have you outgrown your current spreadsheet setup? A short honest audit

Here's a quick way to check yourself instead of guessing. Read each statement and score it: 0 if it's not true of you, 1 if it's sometimes true, 2 if it's clearly true. Add up your score at the end. Be honest. Nobody's grading you, and the point is to land on the right answer for your team, even if that answer is to stay exactly where you are.

Statement	Your score (0, 1, 2)
I've missed or nearly missed a deadline because of how we track things.	____
I check the same dates more than once because I don't fully trust the file.	____
When the GC or board asks for a portfolio view, I have to build it by hand.	____
I've paid a maintenance fee because the date came up, not because we decided the asset was worth keeping.	____
Our patent family relationships live in color codes or naming tricks, not in real structure.	____
If a renewal lapsed, I'm not sure how quickly we'd notice.	____
No one else could answer what's in our portfolio if I were out for two weeks.	____
I spend hours each month on manual tracking, copying dates, or reconciling versions.	____
There's no real record of who changed what in our tracker, or when.	____
The portfolio has grown past the point where I can hold every case in my head.	____
I've thought about switching tools but the dread of moving the data stopped me.	____

Now add it up. The total runs from 0 to 22, and here's the honest read on where you land.

> **0 to 5: A spreadsheet or Sheet is genuinely fine for now.** You're not at risk, and you might not need new software yet. Keep an eye on the statements that scored a 1, because those are the ones that creep up. Run this audit again in six months.
>
> **6 to 12: Start planning. You're not in crisis yet, but the cracks are showing, and they tend to widen over time. This is the comfortable window to evaluate options without a missed deadline forcing your hand. Use the vendor questions later in this guide to start looking around.**
>
> **13 and up: You've outgrown your spreadsheet.** The risk is real and the time you're losing is real. The longer you wait, the more your data grows and the harder the eventual move feels. This is the point where the right tool stops being a luxury and starts being protection.

If you scored low, take the win. Honestly, staying put and saving your money is the right call more often than vendors like to admit. If you scored high, the rest of this guide is about what better actually looks like, and how to move without the dread.

Have you outgrown your legacy IPMS? A short honest audit

If you're already on a legacy IP management system, the question isn't whether you have structure, it's whether the structure is still worth what it costs you. Score each statement 0 if it's not true of you, 1 if it's sometimes true, 2 if it's clearly true. Add up your score at the end.

Statement	Your score (0, 1, 2)
We pay a high annual cost for what is mostly deadline tracking.	____
Standing the system up took months, and parts of it still aren't configured the way we need.	____
The system tells us a renewal is due, but it doesn't help us decide whether the patent is worth keeping.	____
We still build board and GC reports by hand, even though we pay for a full platform.	____
We're paying for scale, seats, or modules we don't actually use.	____
Getting a straight answer out of the system takes more clicks and training than it should.	____
Our outside counsel spend isn't getting any easier to see or control with this tool.	____
Inventions and disclosures still slip through before they're ever captured in the system.	____
When we want to use AI on our portfolio, the data is locked inside the platform.	____
Switching costs and migration fear are a big reason we're still on it.	____
If we were choosing today, we're not sure we'd pick this system again.	____

Now add it up. The total runs from 0 to 22, and here's the honest read on where you land.

> **0 to 5: Your legacy system is earning its keep.** It's doing the job you bought it for, and there's no urgent reason to move. Keep an eye on the statements that scored a 1.
>
> **6 to 12: It's worth a look around. The system still works, but you're paying for more than you're getting, and the gaps are the kind that widen. This is a comfortable window to compare options before a renewal forces the question.**
>
> **13 and up: You've outgrown your legacy IPMS.** You're paying enterprise cost for a system of record while doing the real thinking yourself. The longer you wait, the more a switch feels daunting, but the gap between what you pay and what you get is only growing.

Whichever audit you took, a high score isn't a verdict, it's a prompt to look at what better would actually look like. That's the rest of this guide.

Where ArcPrime fits

ArcPrime starts from a different premise. It's AI native, built from the start to do the work, not just store it. A legacy system tells you a renewal is due. ArcPrime tells you whether the patent is still worth paying for, and explains why.

That shows up in concrete capabilities. ArcPrime runs AI pruning recommendations across your portfolio, scoring each asset so renewal decisions are made on analysis instead of inertia. It surfaces continuation recommendations from public data, flagging where your filings could be extended before the window closes. It harvests inventions automatically, capturing disclosures from Slack, Jira, GitHub, and inventor email before they leak away. When an office action lands, it helps you respond instead of leaving you to start from a blank page. It gives you one click board reporting, with the portfolio mapped to revenue, instead of a manual rebuild. And through its MCP server, it connects your portfolio straight to Claude, GPT, or Cursor, so your AI tools finally work from your real IP data. Think of the question you couldn't answer fast for your GC last quarter, and imagine it answered in one click, with the reasoning attached. How much of your week would that hand back to you?

On the migration fear, ArcPrime offers free white glove migration off any legacy system, or off your spreadsheet or Google Sheet. Your team doesn't do the heavy lifting. That's the part teams dread most, so we took it off your plate. Going live takes weeks. A legacy implementation usually takes months.

ArcPrime is patent management software for anyone who has outgrown a spreadsheet, from a few people up to a large department running tens of thousands of patents. You get real family handling, real renewal logic, real reporting, and an audit trail. ArcPrime also does the work: it scores your portfolio for keep or prune decisions, harvests inventions before they leak, and gives you an AI execution layer on top of the record instead of just storing it.

Could ArcPrime be the right system for you?

ArcPrime does everything a docketing system should, and then keeps going. It may be a fit if any of these sound like you:

- You want real docketing: patent families handled properly, renewal and maintenance fee deadlines tracked with real logic, and a full audit trail.
- You want a system of record you can trust at any scale, from a few people up to a department running tens of thousands of patents.
- You want help deciding what to keep and what to prune, with AI scoring across the portfolio, not just a list of dates.
- You want continuation opportunities flagged from public data before the filing window closes.
- You're tired of inventions leaking out of Slack, Jira, GitHub, and inventor email before they're ever captured.
- You want board and GC reporting in one click, with the portfolio mapped to revenue.
- You want your AI tools, like Claude, GPT, or Cursor, to work directly from your real IP data through an MCP server.
- You'd rather have your migration handled for you, free, in weeks instead of months.

If several of those land, ArcPrime is worth a look. The vendor questions in the next section will help you put it, and any other option, to the test.

> **If this sounds like you:** You've outgrown the spreadsheet, the legacy quotes feel like overkill for the pure docket management they're providing, and what you really want is help making the keep or prune calls. If that's where you are, you've come to the right place.

Stay open to this if you're past the spreadsheet, want real structure without the enterprise weight, and you'd rather the system help you decide than just record. None of that requires taking our word for it, which is exactly why the next section is about questions you can put to any vendor, including us.

Questions to ask any vendor before you switch

If you do decide to look at software, take these questions to every vendor you talk to, not just to us. They're the questions that separate a real fit from a good demo. A vendor who answers them clearly and specifically is one worth your time. A vendor who gets vague is telling you something. Ask everyone the same things and compare the answers side by side.

How do you migrate my data, and do you validate it against the USPTO?

Migration is where switches go wrong. Ask who does the work, how long it takes, and crucially whether the migrated data gets checked against the USPTO record so errors surface before they cost you. A vendor that leaves migration to you, or skips validation, is handing you the riskiest part of the move.

What happens to my patent family relationships?

Your families are the strategy. Ask, in plain terms, how priority applications, continuations, divisionals, and foreign counterparts are modeled and preserved through the move. If a vendor can't show you a family rendered correctly, assume they'll flatten it into rows.

How long until I'm actually live?

There's a difference between signing and being usable. Ask for a realistic timeline to go live with your real data, not a sales estimate. Weeks and months are very different commitments.

What does it actually cost, all in?

Get the full number: license, implementation, migration, training, support, and anything billed per user or per asset. The sticker price and the real price are often far apart, and the gap is usually setup.

What do you do that my current system can't?

Make the vendor earn the upgrade. Whether you're coming from a spreadsheet or a legacy system, ask what changes day to day. The honest test is whether they handle your patent families properly, run your deadlines on real logic, keep a record you can stand behind, and give you reporting you don't rebuild by hand. If the answer is mostly that they store the same data more neatly, you may not need them yet.

Do you help me make informed decisions?

This is the one most vendors dodge. A system of record holds your data and tracks your dates, and many tools stop there. Ask specifically whether the tool helps you decide what to keep, what to prune, and where to file next, or whether every judgment call is still entirely yours.

Run those six past every option on your shortlist, score the answers, and the right choice tends to make itself.

The honest verdict

If you have a small portfolio and few deadlines, a spreadsheet still works, whether it's a private file or a shared Google Sheet. Once families, renewals, reporting, and audit trail start to matter, you've outgrown it. At that point a legacy IPMS will record all of it well, but it's heavy, slow to stand up, and it still leaves the deciding to you. ArcPrime is the option that gives you the structure and helps you make the calls, with the migration handled for you, whether you're a few people or a full department.

The comparison below lays it out across the things that actually matter.

	Spreadsheet	Legacy IPMS	ArcPrime
Cost	Free, already owned	High, plus implementation	Paid, with free migration included
Setup time	Minutes	Often months	Weeks
Best fit	One owner or a small shared team, few cases	Large department with docketing team	Teams that have outgrown a spreadsheet, from a few people to a full department
Patent family handling	None, faked with rows	Strong, built in	Strong, built in
Renewal tracking	Manual dates only	Real deadline logic	Deadline logic plus keep or prune scoring
Board reporting	Rebuilt by hand	Available, often manual to configure	One click board reporting
Audit trail	Weak, version history only, not docket grade	Full audit trail	Full audit trail
Migration help	Not applicable	Usually on you, often painful	Free white glove migration
Helps you decide vs just records	Records only	Records only	Helps you decide: pruning and continuation recommendations, office action help

If you've outgrown your current system

The fear of moving the data is the most common reason teams stay stuck on a tool they've already outgrown. The fastest way to settle that fear is to see exactly how your data moves. Book a 30 minute demo and we'll show you your own portfolio in ArcPrime, walk through how the pruning and continuation recommendations work on real cases, and show you precisely what the free migration off your spreadsheet, Google Sheet, or legacy system looks like.

Bring the six vendor questions and your audit score. If the honest answer after thirty minutes is that you're better off staying where you are, we'll tell you, and you'll have spent half an hour getting clearer about your own portfolio either way.

[Book your portfolio audit at here.]