

What actually happens when you switch IP systems, and why it usually goes wrong.

Why migration fear keeps IP teams on a legacy IPMS

Most in house patent counsel are not staying on their legacy IP management system because they love it. They stay because the idea of moving off it scares them more than the system itself annoys them. The objection is almost never price. It is migration. Almost everyone has heard a version of the same story: a six month project, a vendor that went quiet halfway through, a portfolio that came out the other side with gaps nobody caught until a deadline slipped. If that is the fear holding a team in place, it helps to say the scary parts out loud. The failure modes are real but they are also avoidable.

The first thing to break in an IP management software migration: your data

Start with the part that breaks first, which is the data itself. A legacy export is rarely as clean as the sales conversation implied. Fields that look standard in one system are stored differently in another, custom fields nobody documented show up with cryptic labels, and the status history that tells you where each matter actually stands does not always survive the trip intact. When that history gets flattened or reordered, a team loses the one thing it most needs to trust. Reconciliation is the unglamorous work of mapping every field to its correct home and confirming the dates and statuses still mean what they meant before. Skip it and the problem does not surface until a deadline is upon you. None of this is exotic. It is just tedious, which is precisely why it gets rushed, and rushing it is where the first real losses happen.

How patent family relationships, statuses, and workflows break

The failure that frightens people most, and rightly so, is the one that hits patent family relationships. A portfolio is not a flat list. It is a web of parents, children, continuations, divisionals, and priority claims, and the value often lives in those links as much as in the individual filings. A naive export and import can move every record across and still quietly sever the connections between them, so a continuation lands in the new system with no visible tie to the application it came from. The records are all technically present, which is exactly why this is so dangerous. Nothing looks missing until someone goes looking for a relationship that is no longer there. By then the new system is the system of record, and rebuilding a family tree by hand across hundreds of matters is its own multi week project. The same quiet damage shows up in two other places. Case statuses are the first. Whether a matter is pending, active, or expired has to land exactly right, because a status that imports wrong can hide a live deadline or raise an alarm on a case that is already closed. Workflows are the second. A real docket is not just data, it is the logic that fires when something needs to

happen, the notification that goes out when you decide to file outside the US, the trail of correspondence with outside counsel that tells you who owes what and when. Move the records without that logic and you have a database, not a docket, and the team is back to tracking the work in their heads.

How to know your migrated patent data is correct

Which raises the question almost nobody asks early enough. Once the data is in the new system, how does a team actually know it is correct? It is easy to look at a populated screen and assume the migration worked. A clean looking record is not the same as an accurate one. The only real answer is to validate the migrated data against an authoritative source rather than trusting that the export and import did their jobs. For US filings that means checking the migrated records against the USPTO, and for non-US filings against Espacenet and other authoritative patent sources, so a status, a date, or a relationship can be confirmed against the registry instead of taken on faith. Without that step a team is trusting a black box, and the failure will not surface until the data is load bearing.

Why switching IP systems does not have to take six months

The timeline is the other place teams get a distorted picture, because of the myth that these projects simply take six months because moving data is hard. Moving data is not what takes the time. What takes the time is everything around it. The back and forth to get a usable export out of the old vendor, the rounds of manual cleanup when fields do not map, the spot checking done by hand because no one validated against a source, and the long pause before anyone is confident enough to cut over. A migration stretches into a multi month project when the reconciliation and the checking are improvised after the fact instead of built into the process. The duration is a symptom. The cause is a method that leaves correctness until the end. Fix the method and the calendar shrinks on its own. A team that knows the data is right at each stage does not need the long, nervous pause before cutover, because the confidence was built along the way rather than borrowed at the end.

What an IP management software migration looks like done right

Here is what a migration looks like when it is run properly. A migration should be run by people who do this for a living, in an order that puts correctness first rather than last. The data comes off the legacy system, gets reconciled so the fields and histories map correctly, gets validated against the USPTO so the check is against the registry and not against the export, and only then does the team cut over. Families stay intact because the relationships are treated as data worth preserving, not as a side effect of the import, and the records are confirmed correct before anyone commits to them, not after. Correctness is checked while there is still time to fix it, not discovered after the old system is gone.

How ArcPrime runs your IPMS migration for you, free

Those failure modes are the reason switching feels dangerous. They are also the reason ArcPrime built its migration the way it did. The data reconciliation, the family relationship integrity, the USPTO validation, the careful cutover: on ArcPrime, these are not your job to get right. They are the job ArcPrime's own engineers do for you, as a free, fully white glove migration. The portfolio is moved off the legacy system, the data is reconciled, every record is validated against the USPTO and Espacenet, and the family relationships are confirmed to hold before cutover, so the data is correct before anyone depends on it. Your team does not do the heavy lifting, and there is no migration fee. Because the reconciliation and validation are built into the process rather than left as a scramble at the end, a lean team is usually live in weeks, not the months a legacy migration takes. Switching is never truly painless, but the parts that go wrong, the ones that freeze teams in place, are exactly the parts you do not have to fear when the move is to ArcPrime.

If a legacy IPMS is slowing your team down and the only thing keeping you on it is the fear of the move, that fear is worth a second look. The hard parts above are the parts ArcPrime handles for you, free, with engineers doing the work and the data validated against the USPTO before you commit to anything. See how it works. [Book a walkthrough of your personalized migration plan.](#)