Improving the Quality of IP Services with AI

— IPX's Journey So Far and Our Approach Going Forward —

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[Key Points]

- From July 1, 2026, IPX is moving to a practice structure that makes full use of AI
- We use only enterprise versions of AI with training opted out; your information is never used for training
- We use AI that runs on a carefully designed, robust harness
- Our aim is not only to make existing work more efficient, but to raise quality and speed even further
- Responsibility for final deliverables rests with people (IPX)

1. Introduction

As of July 1, 2026, IPX Patent Partners ("IPX," "we," or "us") will move the AI-enabled practice structure that we have developed and tested in-house into full operation, including patent application work. We have prepared this document to explain our AI governance openly and honestly as we make this transition, and to give our clients peace of mind.

In introducing AI into our work, we chose to communicate our AI governance clearly to our clients. This is because we place importance on (1) our relationship of trust with our clients above all else, (2) making sure we can learn our clients' wishes regarding the use of AI in advance, and, most importantly, (3) never leaving any ambiguity about who is responsible for the quality of our work product.

2. IPX So Far: A Firm That Has Invested in Automation

Before explaining how we use AI, we would like to briefly introduce the approach IPX has taken as a firm to date.

2.1 Developing Our Own Word Macros Since Our Founding

We have automated the repetitive tasks involved in drafting specifications—such as format checks, formatting, preparing examples of supporting descriptions, and generating and updating the restated claims and abstracts—using a suite of Word macros we developed ourselves. This has been an ongoing effort since our founding and forms the core of our in-house know-how. Across our proprietary technologies, including the Word macros, we hold approximately 30 patents.

2.2 A Management Policy That Spares No Investment in Eliminating Repetitive Work

Patent firms usually spend a great deal of manpower and cost on repetitive work. To reduce these costs and thoroughly minimize human error, we have invested heavily in training, workflows, and

systems. As a result, our staff can now devote more time to “what only people can do”—grasping the essence of an invention, assessing patentability, and designing the scope of rights. This is the foundation that has supported our quality and speed.

2.3 A Culture of Sharing Results Across the Entire Firm

Since long before AI arrived, IPX has had a deeply rooted culture in which the features and practical know-how we develop are shared with all staff rather than kept with a few individuals, and everyone works together to build systems that allow anyone to produce output that meets or exceeds IPX’s quality standards. We have also clearly defined the scope of tool use and our operating rules (governance), shared them with everyone, and reviewed them regularly.

We have now added AI, a new tool, to our consistent policy of “using IT to raise quality and speed” and “setting rules for that purpose, and continuously sharing and improving tools and know-how across the organization.”

> **[IPX’s Consistent Policy]**
> We develop systems that go beyond “mere efficiency” to “achieve both quality and speed.” The same applies to AI; our policy remains unchanged.

3. How We Came to Use AI, and Where We Stand Today

3.1 Careful Use of AI with Unpublished Information in Mind

We have carefully controlled the use of AI for pre-filing matters that involve unpublished information, and limited our use of AI to purposes that did not require access to unpublished information, such as documenting general matters and searching, summarizing, and organizing prior art.

3.2 Ongoing Research and Validation Toward Full Adoption of AI

As a firm that has continually invested in IT, we began researching how to integrate generative AI into our practice soon after it emerged. In this research, we took the utmost care to maintain confidentiality: rather than using pre-filing matters entrusted to us by clients, we mainly used post-filing matters and applications filed in IPX’s own name to compare and verify quality and efficiency with and without AI. For prosecution work (responses to office actions and the like), we have built up validation through actual matters.

Through this research, we have independently developed “skills” that enable AI to accurately reproduce our practice procedures; “agents” that combine multiple skills to carry out work autonomously; a “harness” that provides a solid footing for these agents; and AI “access permissions” to our in-house systems that reflect each individual’s authority. We have also researched “context”—what information, and how much of it, should be given to AI to produce effective output. In addition, to prevent contamination of information via memory, we developed “memory management,” which separates work areas for each client and completely partitions memory by client. Even if someone were to try to store one client’s information in memory relating to another client, the AI issues a warning, making human error less likely. We also keep MCP integrations to a minimum.

All of these are proprietary intangible assets that deeply reflect our knowledge and experience; none of them are commercially available.

3.3 Tuning “General-Purpose AI” Rather Than Using “Specialized AI”

In recent years, AI services specialized for intellectual property have appeared. However, while specialized AI is easy to introduce, it is difficult to customize to individual circumstances, and nearly every aspect of its configuration—including the AI models running behind it—depends on the vendor.

We therefore chose, as the foundation of our AI governance, general-purpose AI that provides access to the most advanced models available to ordinary businesses, rather than specialized AI for the IP industry. On that basis, drawing on the IT skills and automation know-how we have cultivated since our founding, we thoroughly tuned general-purpose AI to fit our practice and built an “IPX-dedicated AI environment.”

General-purpose AI evolves rapidly and has the great advantage of providing access to the world’s most advanced frontier models. By building on such high-performance AI models and combining them with our AI governance, we have achieved a system optimized for our practice that commercial specialized AI cannot replicate.

3.4 Systematizing IP Practice in “Layers”

We have systematized our methods for drafting specifications, handling prosecution, and other work into multiple “layers.” The layer structure consists of (1) Layer 1, based on common rules that all staff must follow; (2) Layer 2, based on practice procedures standardized by client, technical field, or a similar unit; and (3) Layer 3, based on the individual refinements each patent attorney has accumulated.

Layer 1 provides a common foundation that prevents variation in quality; Layer 2 applies customized settings by client, field, or a similar unit; and Layer 3 allows each patent attorney’s refinements and preferences to be reflected. Layer 1 is strictly managed by administrators and cannot be changed by staff on their own. Layers 2 and 3, on the other hand, can be updated flexibly by designated people through regular exchanges of information with those in charge.

3.5 Sharing Configuration Files and More Across the Firm

We have built a system through which configuration files and skills carefully set up by administrators, as well as skills that individual members have developed and improved themselves, can be shared easily with all staff through intuitive operations, without using tools such as GitHub. Think of it as an “in-house marketplace” for configuration files, skills, and the like.

As a result, anyone’s know-how or improvements are immediately shared as practical skills across the entire organization, and they can be handed over between staff as needed. This system of “sharing results with everyone” follows the culture we had even before AI.

These are the reasons we concluded that “the conditions are in place to enter the phase of full-scale AI adoption.”

4. IPX Going Forward: Our New Structure for the AI Era

Based on the results of our research to date, from July 1, 2026, we will use AI in our practice under the following structure.

Internal Structure

1. Use AI agents built on a robust harness that takes data access permissions into account for all work, including patent application work
2. Recognizing that dependence on a specific model is a risk, maintain an environment in which multiple AI models besides our main model can be used
3. Taking geopolitical factors into account, build local LLMs in parallel
4. Clearly disclose our AI policy to clients
5. Our patent attorneys naturally bear responsibility for final deliverables

Our AI governance is built and operated as follows.

AI Governance

1. Strict control of behavior through configuration files carefully set by administrators
2. Restriction of AI access to in-house systems, separated by user
3. In-house sharing of skills and more
4. Memory management that prevents contamination of information
5. MCP integrations kept to the minimum necessary
6. A robust harness that includes all of the above
7. One-on-one meetings with every staff member on AI adoption, plus frequent AI training and information-sharing sessions

Generative AI excels at producing documents in line with a direction or path it is given (so to speak, “filling in” work). On the other hand, we believe that identifying the key points of an invention, deciding the approach to claims and drawings, envisioning how the invention will be used, and similar tasks still require the professional skills and experience of patent attorneys.

Therefore, unless a client specifically requests otherwise, a patent attorney first establishes the framework and approach of the specification, including the approach to the claims and drawings, and then entrusts AI with drafting the embodiments in line with that approach. The patent attorney in charge then scrutinizes and checks the AI-generated draft and completes the final work product. We never deliver AI-generated output as is. As before, patent attorneys bear responsibility for final quality.

We will also further systematize and accumulate, as skills, the IP practice know-how we have built up. Making full use of these, we intend to provide our clients with IP services of even higher quality than before, reflecting knowledge unique to IPX.

5. AI Models We Use and Their Safety

5.1 Your Information Is Not Used for Training

All AI used by IPX is the corporate (enterprise) version. Under these contracts, the use of data for training is automatically opted out from the time of contract, and opting in is not possible. As a result, client information sent to AI is never used to train AI models.

We also expressly prohibit the use of free or individually contracted AI for work (i.e., a ban on “shadow AI”). Shadow AI often arises when people cannot use AI at work, or when the AI they are allowed to use is not one they find suitable. At IPX, we provide an environment with such a wide range of AI models that there is no need to resort to shadow AI. This structurally eliminates and reduces the risk of client information leaking through unexpected channels.

5.2 The Scope of Information Given to AI Is Determined Carefully Under Internal Standards

As described above, all AI used by IPX is the enterprise version with training opted out, and client information is never used for training. Even so, we carefully determine the scope of information given to AI based on internal standards, according to the confidentiality and nature of each matter. If a client has a specific request (for example, that a particular matter be handled without AI, or that a particular AI be used), we will discuss it individually and respond flexibly.

5.3 We Regularly Review Our Operating Rules and Guidelines

The technology, laws, and social conditions surrounding AI are changing rapidly. We do not treat our operating rules and guidelines on AI use as fixed; we review them regularly and revise them as necessary. When new risks or better operating methods are identified, we promptly reflect them in our structure. If there is a material change to the policy we have presented to our clients, we will notify you again.

5.4 Preparing to Introduce Local LLMs

To respond to measures such as bans on the use of certain AI models due to geopolitical factors, we are preparing to introduce “local LLMs” that complete processing entirely within our in-house environment without going through external servers. We aim to build a structure in which closed models, including frontier models, and local LLMs based on open models are used together and chosen according to the situation.

[IPX’s AI Governance]

Permission settings and authorization rules for AI are managed centrally and cannot be changed individually by members. In addition, the data that AI can access is separated for each individual, and we use AI agents built on a common harness.

6. People and Training

It is not the case that “anyone can achieve the same results with AI.” Using AI output as is and using AI as a tool to raise quality are entirely different things. What ultimately determines the quality of

output is whether one understands AI's limitations and characteristics and can make full use of it in the context of actual practice, and whether one can work together with AI to reach even higher levels.

6.1 Hiring That Emphasizes Expertise and Literacy

For every role—patent attorneys, translators, tracers, searchers, and others—IPX has hired only members whose IT literacy meets a certain standard. Even before we began using AI, our organization was built on the premise that our staff have a high level of IT literacy.

6.2 Frequent Information Sharing

At least once a week, all staff share the latest AI use cases and failures, as well as newly developed skills. We also have a system for constantly keeping up with the latest information on AI—model advances, new features, new risks, and more—and promptly sharing it with the members who need it. We have also built a system that uses AI to automatically add the latest AI news to a database.

Developments in AI move extremely fast, and it is not unusual for "best practices from a few weeks ago to already be out of date." The latest information we obtain is reflected in our internal operating rules and skills as it arrives, so that as an organization we always maintain the most current and optimal ways of using AI.

6.3 Support Program for Personal AI Research

We also have a program to support staff who pursue AI research outside their work. The AI environment used for personal research is clearly separated from the AI environment used for patent application work, and the framework for personal research is never used for patent application work.

7. Delivering Further Value

7.1 Pursuing Value Made Possible by AI, Not Just Efficiency in Existing Work

The use of AI is making our existing work more efficient; in particular, we have achieved dramatic efficiency gains in back-office work. For our clients, however, we intend to pursue not mere efficiency but new value that can only be realized through collaboration between AI and people.

7.2 AI Is a "Tool" That Extends Patent Attorneys' Expertise

Our use of AI does not replace patent attorneys' expertise; we position it as a tool to further raise the quality of their professional judgment. In other words, building on patent attorneys' existing expertise—understanding inventions, judging patentability, designing the scope of rights, and preparing necessary and sufficient drawings—we aim to further improve quality and speed with AI.

7.3 Greater Value for Our Clients

Through the use of AI, the density of quality checks, the comprehensiveness of searches, and the speed of response will all improve beyond previous levels. "Delivering higher quality, faster"—this is our promise.

[Responsibility for Quality]

Regardless of whether AI is used, IPX Patent Partners bears responsibility for the quality of deliverables. We never deliver AI output as is. Should any quality issue arise, we will take responsibility and address it, just as we always have.

8. Our Commitments to You

Finally, we summarize the content of this document in four points.

① Enterprise AI only	We use only enterprise AI with training opted out to protect your information.
② Delivering further value	Our aim is not cost-cutting through efficiency, but further improving quality and speed.
③ Patent attorneys remain responsible	Patent attorneys always scrutinize and check AI output to ensure final quality.
④ Continuous learning as an organization	Through information-sharing sessions, in-house development of skills and more, and our research support program, all staff will continue to improve how we use AI.

If you have any questions or concerns, or individual requests such as “Please handle this matter without using AI,” please do not hesitate to let us know at any time.

We will continue to strive to provide even higher-quality services. We sincerely appreciate your continued patronage of IPX Patent Partners.

All members of IPX Patent Partners