



IMPLEMENTING REPEATABLE PROCESSES TO SUSTAIN INNOVATION

Zone 1. Case History
Ben Taylor, Wells Fargo



BEN TAYLOR

**Executive Director
Patent Program Strategy
*Wells Fargo***

Lead invention strategy and AI transformation

- Program design and development
- AI workflow and capability deployment
- data analytics, insights & measurement
- stakeholder and LOB engagement
- inventor community enablement & growth
- governance, reporting & program outcomes

20+ years in IP strategy, including 10+ years advising global clients on analytics, insights, and invention

Worked across diverse industries including tech, FMCG, food / beverage, financial services, and manufacturing

○ ○ ○ **SESSION OVERVIEW**



The Story

How Wells Fargo's Patent Group used AI as a catalyst to transform repeatable IP management processes

25 minutes

The Activity

Mini audit: map one of your processes through three lenses and identify your leverage points

10 - 15 minutes

Q&A

How Wells Fargo's Patent Group used AI as a catalyst to transform repeatable innovation processes

5 minutes



TARGET OUTCOMES



- Reframe repeatable processes for an AI-driven innovation environment.
- Spot where repeatability truly belongs using a workflow and process audit.
- Decide what should stick, separating durable value from experimentation.
- Leave with one actionable use case you can pursue further.



PATENT PROGRAMS RUN ON REPEATABLE PROCESSES.

- Our program has historically operated in 3-year cycles
- Each cycle adapts to shifts in tech, the organization, and consumer trends
- Core processes have remained stable, though not static, for years
- Our focus was always refinement, not reinvention.

A well-run patent program helps the firm commercialize, protect, and sustain its innovations; how well we execute directly determines the value we create for the enterprise





PROGRAM ARCHITECTURE



Operations

Strategy

Engage

Harvest

Review

File

Manage

PROCESS

- Relationship Mgmt.
- IP Executive Program
- Awards, recognition, & events
- Comms. & newsletter
- Reporting & metrics

- Facilitated invention sessions
- Inventor submissions
- Patent Counsel interviews

- Technical review
- Legal review (prior art, patentability)
- Business review (confirm alignment and use case)

- Prep and prosecution

- Risk management
- Partnerships
- Negotiations

TECH

- Patent Portal

- IDF submission platform

- Tools utilized by Outside Counsel and USPTO

PEOPLE

- Patent Counsel
- Strategy Consultants
- Ops team
- Inventors

- Patent Counsel
- Strategy Consultants
- Inventors

- Patent Counsel
- Outside Counsel

- Outside Counsel
- USPTO

- Patent Counsel

Inventor Community

○ ○ ○ THEN AI SHOWED UP

We were presented with an opportunity to think about our processes in a new way, potentially rebuilding our workflows from the group up.



○ ○ ○ THE WORKFLOW AUDIT



We mapped our workflow end-to-end, including handoffs and dependencies, using three “lenses”, then prioritized AI investment points.

Enhance

What core work can AI help us do significantly better?

Shift

Where can AI change who does the work — internally or with partners?

Expand

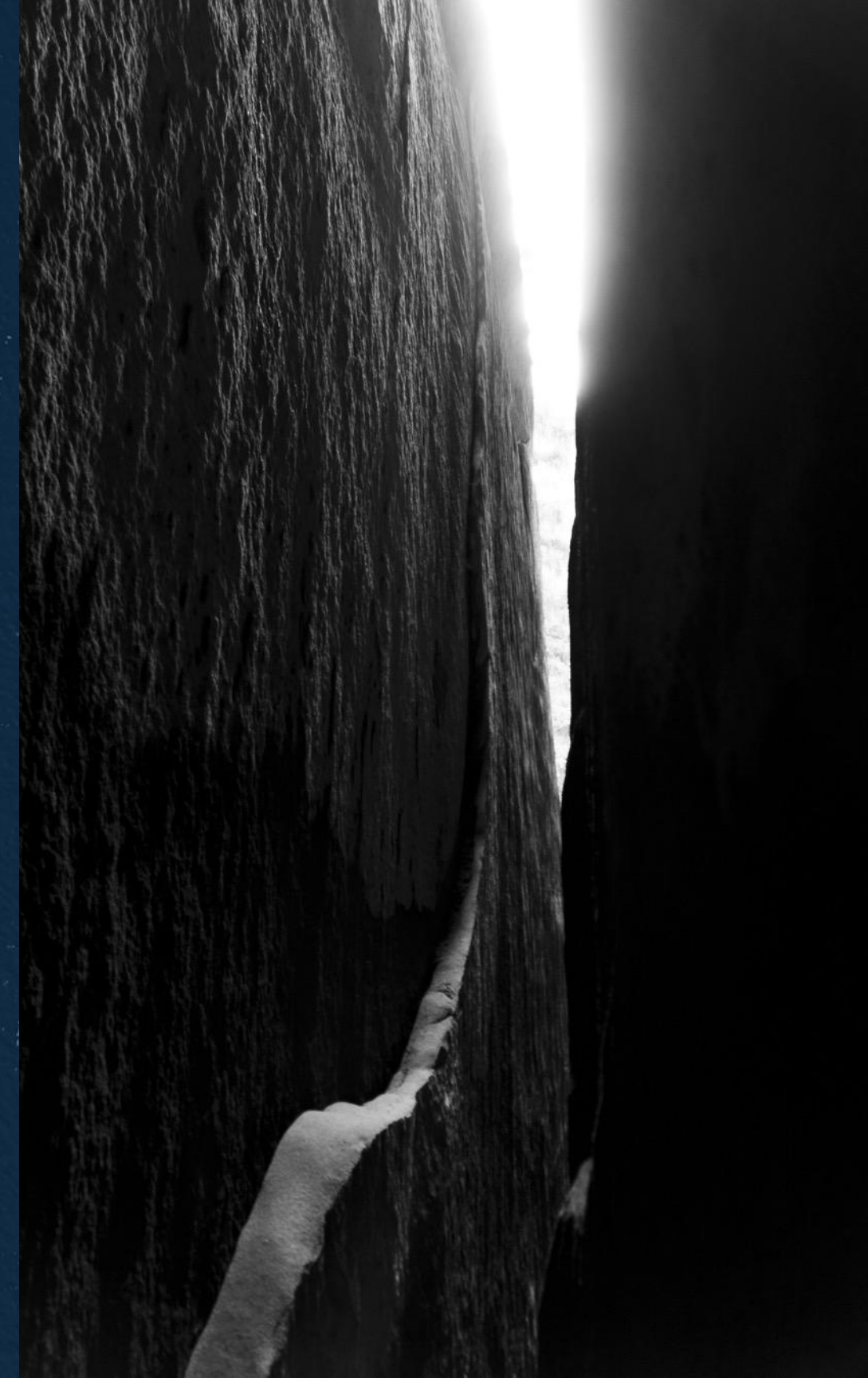
What entirely new capabilities can we now deploy that weren't feasible before?

Guiding Principles

- Leverage our enterprise AI tools and platforms as the primary option
- Use purpose-built (vendor) tools where there is a gap in quality / efficiency
- Work with partners to ensure alignment and incentives across redefined processes and workflows

○○ ○ WHAT THE AUDIT REVEALED

- Opportunity isn't evenly distributed
- Where we spend the most, we influence the least
- The real opportunity is at the edges
- We already run lean - the goal is more with the same
- New capabilities can blur the line between IP development and innovation
- AI could close gaps that we have been trying to address

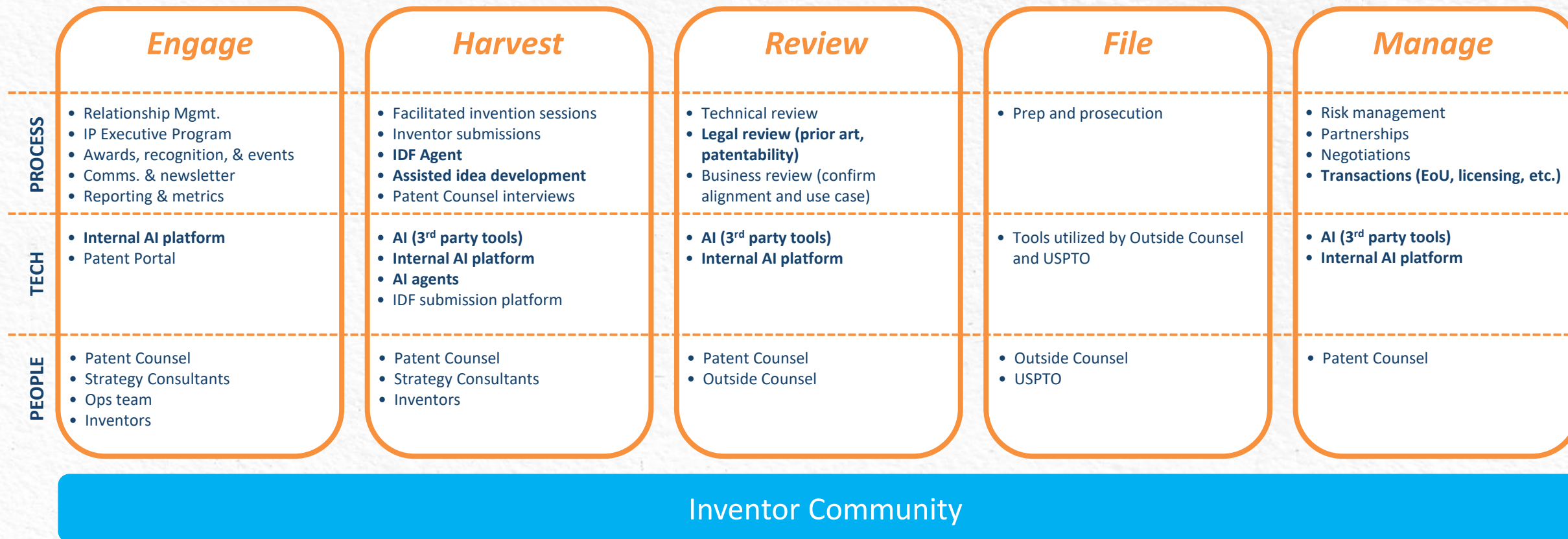




PROGRAM ARCHITECTURE - REDEFINED

Operations

Strategy



○ ○ ○ **ACTIVITY**



Rebuild One Workflow Through an AI Lens

- 1 **Pick your workflow.** Choose one process you own or regularly engage with end-to-end. It doesn't need to be perfect or fully mapped — 6 to 10 steps is plenty to work with.
- 2 **Map it quickly.** List the steps from start to finish. For each, note who does the work, what the input and output are, and where handoffs happen. Speed over precision here.
- 3 **Tag each step.** Label each step with one of three tags: E (Enhance); S (Shift) or X (Expand).
- 4 **Find your leverage point.** Pick the one or two steps where you see the greatest opportunity. For each, write one sentence describing what "better" looks like and one metric that would tell you it's working
- 5 **Group discussion (10 minutes)**

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ACTIVITY WORKSHEET
Mini Audit: Rebuild One Workflow Through an AI Lens

Goal: Identify at least one step in a process you own or engage with that you can influence in a new way — using AI or other available resources.

STEP 1	STEP 2
Pick Your Workflow Choose one process you own or regularly engage with end-to-end. 6–10 steps is plenty — it doesn't need to be perfect or fully mapped.	Spot the Friction For each step, ask: is there friction or opportunity here? Mark it ✓ if yes. Look for steps that are slow, manual, repetitive, or inconsistent. If it feels like a pain point or an untapped opportunity, flag it — those are your leverage candidates.

STEP 3 **Tag Each Flagged Step** *Focus on the steps you marked ✓ in Step 2 — those are your candidates.*

E	S	X
Enhance <i>AI makes this step faster, better, or more consistent</i>	Shift <i>AI shifts work to internal teams or external partners</i>	Expand <i>AI enables something that wasn't previously feasible</i>

STEP 4

Find Your Leverage Point
 From your flagged and tagged steps, pick the one or two with the greatest opportunity. Write one sentence describing what 'better' looks like — and one metric that would tell you it's working.

MY WORKFLOW: _____ NAME: _____

WORKFLOW STEPS (list 6–10)	Opportunity? (✓)	TAG (E / S / X)

LEVERAGE POINT	WHAT 'BETTER' LOOKS LIKE	SUCCESS METRIC

■ **Group Discussion (10 minutes)** — Be prepared to share your leverage point, what 'better' looks like, and how you'd measure it.

Ben Taylor · Executive Director, Patent Program Strategy · Wells Fargo · Frost Innovation Workshop Tour 2026

○ ○ ○ MAKING AI-BASED PROCESSES REPEATABLE

Not every AI-enabled process earns a permanent place in the workflow — we are deliberate about what we standardize, what we evolve, and what we watch.

- The benefits are real
- The environment never stops moving
- We are selective about what we fully re-establish
- Some processes stay in incremental evolution
- We actively monitor for new opportunity



○○ ○ MEASURING WHAT MATTERS

We didn't replace our existing measurement framework — we expanded it to measure new and evolving indicators of success

- Traditional metrics still anchor the program
- We now measure tool adoption
- Quality and quantity of AI-assisted IDFs
- Self-sufficiency of our inventor community
- Product metrics vs. IP metrics





KEY TAKEAWAYS



- Repeatability processes are a competitive advantage
- A structured audit changes the conversation
- Not every AI-enabled process earns a permanent place
- Measure what actually changed



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THANK YOU

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FROST & SULLIVAN

