Agenda

New Launched Consultancy Service Improving PATLIB Profile....

Part 1
- Starting Point: services at Patlib Center Aachen in 2015
- Introduction of a new service
  - motivation
  - designing the guidelines and routines
  - administrative framework

Part 2
- Group exercise
  - check out the tools with fictional case studies
- Feedback & Discussion
PNZ: Patlib Centre Aachen

Facility of the University Library, RWTH Aachen University.

- Provider of information services for science and industry
- Part of (inter)national networks
- Our customers:
  - SMEs, scientists & students, entrepreneurs & inventors, patent attorneys & lawyers
- Our staff: 6 employees
  - 4 librarians, 2 scientific background
  - highly experienced
  - predominantly more than 10 years on their position

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Starting Point

Situation in 2015

- Search services
  - IPR-searches and –monitoring.
- Consultancy services
  - only in cooperation with local patent attorneys.
- PR-related offers
  - information events & kiosks, publications, trade fairs.
- Others
  - receiving office for IPR-applications to the GPTO.
In Actual Fact…

…Consultation has been given…

- Unstructured (by phone / by Email / on site)
- Free of charge
- Not properly documented and measured
- Without quality control

Customer contact in 2015

<table>
<thead>
<tr>
<th>On site</th>
<th>By phone</th>
<th>By Email</th>
</tr>
</thead>
<tbody>
<tr>
<td>535</td>
<td>1733</td>
<td>375</td>
</tr>
</tbody>
</table>

No revenues and no quality management!

How can we make our (valuable) knowledge pay?

Challenge: Introduction of a New Consulting Service

Motivation / Expected Benefit

- Customer’s requirements are changing
  - needs for consultancy services are rising continuously
- Standardized services
  - quality control
- Defined documentation
  - quality management
- Generating revenue
  - personnel-intensive and time consuming operations are now rewarded

New Service element: IPR-Strategies for Newcomers and SME
Approach

How Did We Do It?

• Help of PATLIB network in Germany
  - PATLIB Centre Darmstadt first introduced that kind of consultancy service

• We adapted the idea to our settings by
  - evolving a business routine
  - generating tools
    § guidance and information material, customer contact forms
  - installing administrative framework
    § extend (60 minutes) and fees (90 €) had been determined

Substantial Staff Training

Most Important Point

• Change in customer communication was essential!

• Professional human resources development courses and in-service training

• Preliminary exercises in preparation for real customer clinics

• Initial period: tandem consultancies for individual feedback
Business Routine

Step-By-Step Process

- **Customer contact**
  - documentation with new developed customer contact forms (for phone and on-site contact)

- **Preparation for the clinic**
  - compilation of the required brochures

- **Take out the clinic (60 min)**

- **Further advice / guidance**
  - IPR- searches are part of the service!
  - establish contact to partners for advice on funding, financing and legal information

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**Customer Contact Forms**

**Purpose**

- **Proper documentation**
  - quality management

- **Guidance of the customers**

- **Facilitates harmonization of interlocking services with cooperation partners**
Consulting Guidelines – Main Aspects

IPR for Every Purpose
- technical solution, signs, appearance...

Protection Requirements
- novelty, distinctiveness...

Procedures
- e.g. filing, examination, term of protection...

Fees & Funding
- attorney's and official fees...

First Evaluation

Initial Success is Noticeable
- Amount of consultancies has increased clearly
  - in absolute numbers, too
- Encouragement to proceed and enhance the consultancy services.
  - we developed a 3-step concept
  - IPR-Strategies for newcomers is a first level element
Levels of Consultation

Enhanced Services

- **2nd level: “IP-Audit-light”**
  - for SME needing IPR-management
  - part of the EU-project VIP4SME
  - launched in 2017

- **3rd level in process**
  - comprehensive consulting on patent strategies
  - for SME with IPR experience / with a patent application
  - a tool for this purpose is being developed by members of PIznet for the PIznet community

Summary

Benefits of Implementing the Service „IPR-Strategies for Newcomers“

- Unstructured services
- Interview guidelines, information leaflets
- Standardized services
- No quality control and documentation
- Contact forms, business trainings
- Quality management
- Free of charge
- Fixed duration and fee
- Revenue is generated
Part 2

Group Exercise

- 3 (fictional) case studies
  - inventions supposed to be protected with IPR

- Task: each table conducts a consulting interview
  - split up into two parties (customers and consultants)
  - use the provided tools
  - consultancy guidelines & information leaflet

Group Exercise

3 Fictional Case Studies

- BIRDS-BESAFE Trade mark (and other IPR)
- BALLRIDER Design (and other IPR)
- SMART Patent
Feedback and Discussion

We Would Like to Know...

• Do you offer similar services?
• How would you evaluate the usability of the tools?
• What do you think about the service?
  – would you adopt the business routine?
  – would you like to reuse the guidelines?
• Internal quality control
  – appropriate and verifiable measure for client communication?
• Any other comments?

Thank You!

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