PATLIB2018

IP Pre-diagnosis services Lite (IPDL) for Patent Libraries
Cooperation Project between DPMA and PIZnet

Ljubljana, 03.05.2018

Roger Hildebrandt, German Patent and Trade Mark Office (DPMA)
Matthias Knöbel, Technische Universität Dresden / PIZnet network

www.dpma.de
IPDL - Pilot


1 Week
11 PATLIBS
40 IPDL Diagnoses

80% satisfied customers
(thereof 90% new customers)

26 follow-up orders (70%)

IPD vs. IPDL

IPD classic
advanced level

IPDL
beginners level
IPD vs IPDL

**IPD classic**
- Awareness
- Customer satisfaction
- Follow-up orders

**IPDL**
- Awareness
- Customer satisfaction
- Follow-up orders

IPDL - scope

- No project related consulting
- No legal advice
- No business consulting
IPDL - targets

Awareness of companies (customers) with regard to the relevance of IP

Clarify that IP has potential and can be dangerous

Designate dangers + Expose potentials

Attracting new PATLIB customers

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IPDL - preparation

Schedule

1. Event note on the week of action on the Internet pages of the DPMA (from 07.08.2017)
2. Advance information for selected partners of participating PATLIBS
3. "VIP4SME ticket Flyer" with QR-code as a link to the event sites of the DPMA
4. Digital flyer and VIP4SME ticket to the PATLIBS
5. Press release of the DPMA for the week of action on 28.08.2017
6. Start of the advertisement of the action week by the PATLIBS with the available advertising material from 28.08.2017
7. DPMA newsletter 01.09.2017
8. Implementation of the week 11.09.-15.09.2017

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### IPDL - results

#### Analysis

**Documents**

1. Registration form
2. List of participants including PIZ staff
3. Interview - Questionnaire form “IP Audit Light”
4. Evaluation with “Auditor Report”
5. Feedback form

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### IPDL - results

#### Registration form

1. Size of the company?
2. Since when on the market?
3. Spin-off of the University?
4. Already IP protection?
5. Already participating in VIP4SME event?

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IPDL - results

Analysis
Documents

1. Registration form
2. List of participants including PIZ staff
3. Interview - Questionnaire form “IP Audit Light“
5. Feedback form

List of participants

1. Type of event
2. Date
3. Title
4. Organizer (PATLIB)
5. List with participants
1 - Interview
simplified analysis of the company-specific IP situation

2 - Report
simplified assessment of the risks and opportunities with regard to

1.

IPDL - scope

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1 - Interview
introduction / warm up
standardized interview

2 - Report
joint assessment of the interview + illustration of possible next steps +
continuative services / feedback / follow up appointment

75 min + 75 min

IPDL - scope

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IPDL - results

Analysis
Documents

1. Registration form
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3. Interview - Questionnaire form “IP Audit Light“
5. Feedback form

IPDL - scope

1 - Interview

- patents & utility models
- trade marks
- designs

- soft IP
- contractual based IP
- third parties IP
- infringement

75 min

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IPDL - results

Questionnaire form “IP Audit Light“

1. Information on the company (contact, company, foundation, legal form, sector...)
2. Portfolio of enterprise (IP culture, patents, utility models, trade marks, designs, intangible assets, protection measures, copyright)

Analysis

Documents

1. Registration form
2. List of participants including PIZ staff
3. Interview - Questionnaire form “IP Audit Light“
5. Feedback form
2 – Report (3-5 pages)

- needs assessment:
  - IP-culture (patents / utility models, trade marks, designs, soft-IP, contractual IP, third parties, infringement)

- summary, liability disclaimer
- signature / seal of the PATLIB centre
- amendment

75 min

Intellectual Property of the company

<table>
<thead>
<tr>
<th>Intellectual Property of the company</th>
<th>Relevance</th>
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<tbody>
<tr>
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<tr>
<td>Patent / utility model</td>
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<tr>
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<tr>
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<tr>
<td>Know-How / Show-How</td>
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<td>Trade secrets</td>
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<tr>
<td>Other (geographical indications, topographies, etc.)</td>
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### IPDL - report

<table>
<thead>
<tr>
<th>Patent / utility model</th>
<th>need for action</th>
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<tr>
<td></td>
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<tr>
<td>Continuative advice / guidance</td>
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<td>Basic search</td>
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<tr>
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<tr>
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<tr>
<td>Governing law search</td>
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<td>Patent statistics / analysis</td>
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<td>Patent monitoring</td>
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<tr>
<td>Other / comments</td>
<td></td>
</tr>
</tbody>
</table>

Try to integrate services that your PATLIB center offers!

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### IPDL - results

**Evaluation with “Auditor Report“ (1)**

**Cover page**
- Ticket Number
- Name of PATLIB
- Auditor
Evaluation with “Auditor Report“ (2)

Evaluation

- Relevance of different rights
- IP culture
- Need of special services depending on kind of right

Analysis

Documents

1. Registration form
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3. Interview - Questionnaire form “IP Audit Light”
5. Feedback form
Feedback form

- Expectations fulfilled?
- Satisfied with information?
- Now broader understanding?
- Integration of knowledge into business processes possible?
- Recommendation to others?
- Continue to be informed?

Conclusions

Result of survey of PIZnet network among PATLIBs

Contentment of PATLIBs: 1 = 50 %, 2 = 30 %, 3 = 10 %, 5 = 10 %
1 = very good, ..., 5 = unsatisfactory

Participation of PATLIB again?
1 = 50 %, 2 = 20 %, 3 = 20 %, 4 = 10 %
1 = highly likely, ..., 5 = No

Company size:
< 10: 81 %, 10-50: 10 %, 50-100: 3 %, 100-250: 6 %

Contentment of customers: 1 = 45 %, 2 = 48 %, 3 = 7 %
1 = very good, ..., 5 = unsatisfactory
Experiences from the promotion week
from the perspective of a PATLIB

Very good marketing tool

Support of the DPMA for preparation, marketing implementation and evaluation very valuable and significant for the success of the action

Questions in the interview to extensively and not adapted to the individual situation of the interviewees (customers)

Evaluation report very helpful for enterprises and for PATLIBs

Confidentiality of the collected data and disclosure to third parties is not clearly regulated

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Proposals for further actions
from the perspective of a PATLIB

The questions for the interview should be thoroughly reworked

The questions in the interview should be better adapted to the individual conditions of the interviewees

The questions could be asked in the form of a schedule, for example "If response to question 5 = no, then continue with question 8"

The confidentiality of data should be better guaranteed and regulated more transparent for all participants

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IPDL - marketing

Joint Marketing

- target groups: SME & intermediaries/multipliers
- focus on a limited time frame (1 week)
- online & offline & social media
- offer a voucher / free ticket for the IPDL
- involve your partners (R&D, CCI, branch associations etc.)

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IPD

Source: http://www.medways.eu/branchennews.php#vip
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