



Cabinet Beau de Loménie

REDESIGNING THE CLIENT

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Tailoring service offerings
Learning from clients

by Didier INTÈS

November 2014
15th FICPI Open Forum
Barcelona, Spain

REDESIGNING THE CLIENT ALSO MEANS ...

ADAPTING TO THE CLIENT



PRE-REQUISITE: MUTUAL UNDERSTANDING

We cannot understand each other if ... we do not speak the same language:

- understand the client's environment and vocabulary.

Try to know more about the client and his background, how he started his business...

- adapt your language to his level of knowledge.

USE WORDS AND EXAMPLES THAT ARE MEANINGFUL FOR HIM

TYPICAL EXAMPLE: FREEDOM TO OPERATE VS. PATENTABILITY

Client says: I want to file a patent to have an exclusive right to use my new product on a commercial scale.

Nice legal wording: a patent is a bundle of rights you may exploit to prevent others from copying your products, but it does not give you the right to commercially use your own product...: *leads to a confused client.*



CONCRETE POINT OF VIEW: SIMPLE EXAMPLE CHAIR/ARMCHAIR



Invention « chair »

has:

- feet
- a seat rest
- a back rest

Invention « armchair »

has:

- feet
- a seat rest
- a back rest
- + armrests



Patentable over « chair »?

YES

Can be freely used over the « chair » patent?

NO



YOUR EDUCATION
(TECHNICAL/LEGAL)

YOUR PROFESSION
(WITH ITS RULES, INCLUDING
PRIVILEGE AND
CONFIDENTIALITY)

YOUR FEE STRUCTURE
(I CHARGE BASED ON TIME SPENT,
BUT I DON'T HAVE A STOPWATCH
IN PLACE OF A BRAIN OR A
HEART).

UNDERSTANDING THE CLIENT

WHAT'S HIS FIRST IMPRESSION ON IP?

- Is he accustomed to seeking legal advice?
- Is he impressed by you /are you impressed by him?
- Is he reluctant regarding IP?
 - assess his level of comfort regarding receiving legal advice;
 - help him define his needs; and
 - lead him to tell you « the whole story ».

INFORM PROPERLY

TOO MUCH INFO CAN BE AS BAD AS NO INFO

- A lot of (sometimes incorrect) information is available regarding IP (e.g., via Internet) Help the client sort out:
 - What is a “good” patent claim?
 - Ex., it is not a “photograph” of his prototype.
 - IP costs
 - Depends on what IP services we are talking about.
 - Online offers for services
 - Are they adapted to the client’s needs and organization?
 - Indicate suitable websites.
- Client gives too little or too much information:
 - Invite the client to surf on free patent data bases;
 - Show an example of a suitable invention disclosure form; and
 - Explain “level of detail” needed.

ESTABLISH LINES OF COMMUNICATION

KNOWING THE CLIENT :

EVEN IN A LARGE FIRM, YOU HAVE A LIMITED NUMBER OF CONTACT PERSONS.

- Create occasions for your clients to speak together, to share their experience of IP (and of your services).
- Accept « trainees » from the client's staff (e.g., the client has a new secretary in charge of IP matters: invite him/her to spend one or two days in your firm, to see the existing files, to see how you work, to “break the ice” with your administrative staff...).



SPECIFIC TO LARGE FIRMS

- Choose the right person who fits with the client's needs and behavior;
- Organize the first contact, step back and "let the chemistry begin";
- Show the client that you are available if needed, but limit your visibility: allow the client to realize that this contact person in the firm is « a good match »; and
- Do not try to impress the client.

TEAMWORK

A CLIENT-
DEDICATED TEAM
(OF SEVERAL PATENT
ATTORNEYS)

ENCOURAGE
COMMUNICATION
(AMONG THE CLIENT-
DEDICATED TEAM)

LEARN FROM OUR
MISTAKES
(AND SHARE AMONG THE
TEAM)

HOMOGENEITY

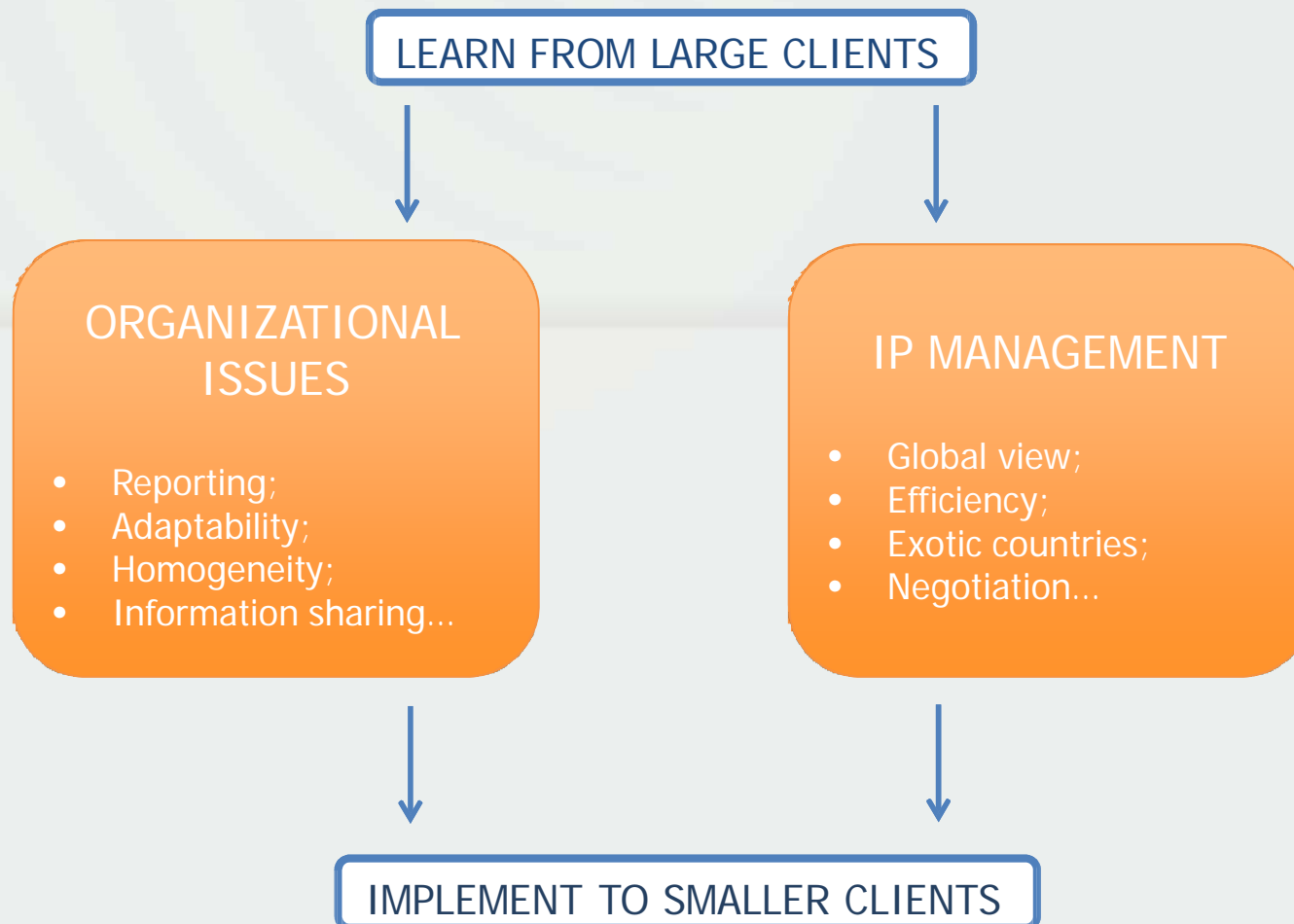
HOMOGENEOUS
WORDING

SAME
PRESENTATION OF
LETTERS/EMAILS

CREATE
GUIDELINES
(HOW TO BEST SERVE
THE CLIENTS)

INFORMATION LEARNED HERE CAN

LEARN FROM LARGE CLIENTS





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THANK YOU!

Didier INTÈS
dintes@bdl-ip.com

CABINET BEAU DE LOMÉNIE

Paris / Lille / Lyon / Marseille

Duisburg / Munich

Birmingham

www.bdl-ip.com

Siège social : 158, rue de l'Université 75340 Paris Cedex 07
Tel. : +33 (0)1 44 18 89 00 / Fax : +33 (0)1 44 18 04 23

contact@bdl-ip.com