



# The Quality Charter of ACPI

**Quality control using quality assurance methods  
to bring your firm to the next level**



## Context

**The French profession of IP attorneys, comprising barely 1000 attorneys, faces stronger competition mostly due to**

- **the increasing competition of litigators**
- **filing and renewal platforms**
- **the recent new positioning of the French Patent & Trademark Office and other public institutions as service providers tending to disregard the profession.**





## IP Excellence Charter

✓ **False:**

- **A self-certification of excellence**
- **Restating professional rules of conduct**
- **Towards a collective bargaining agreement ?**

✓ **True:**

- **A step toward continuous quality improvement**
- **A think tank**
- **Enhancing the profession's reputation**





## Principle

The objective of the National Quality Charter of patent and trademark attorney firms is to support IP attorney firms in the continuous improvement in the quality of their services.

Each member of the Quality Charter is given a certification called “*IP Excellence*” once they subscribe to the aim of the Charter (to improve their IP firm assets) and agree to fill in a self-evaluation questionnaire every year, so that the member can keep the certification every year.





- ✓ **A universal dimension:** the Charter is intended, through their managing partners, for all PTA firms who believe in the profession's fundamental values and the historic and strategic role played by the Association of Patent and Trademark Attorney firms (ACPI);
- ✓ **An educational dimension:** the vocation of the Charter is to distribute a culture of quality and documentary resources to all its members;
- ✓ **A promotional dimension:** the PTA firms which decide to join the Charter can demonstrate their commitments to their clients and institutional partners, in a context that is currently highly competitive.



## A significant sample



- 50% of the members of ACPI
- 1/3 of French IP attorneys
- A workforce of 940 employees (35% of the French profession)



## More than 100 questions to encourage re-think about...



- **Strategy and professional practice**
- **International action**
- **Reliability of file management and data safety**
- **Confidentiality**
- **Client satisfaction**
- **Public interest**
- **Human resources**
- **Governance**
- **Ethics and transparency**
- **Sustainable development**





Please read before you complete the questionnaire:

Manager(s) are asked to perform on their own a self-assessment of their firm in order to fully reap its benefits.

The data supplied relates:

- to the calendar year preceding the year in which the manager completes the self-assessment questionnaire (year N-1 = base year); and
- to the whole firm and not just to the manager completing the questionnaire.

To simplify the use of specific data, an average per IP attorney is requested to be calculated.

By way of example, the amount of time dedicated to general interest measures is calculated, on the base year, by adding the time spent by the partners, by the salaried IP attorneys and by the paralegal staff who prepared the intervention. The total must be divided by the number of IP attorneys in the firm who may be partners or not. The result will be expressed as a number of hours.

As a reminder, one of the purposes of self-assessment is to promote the setting up of indicators so as to better monitor the business of the firm and be able to manage it strategically.

## 1. STRATEGY AND TRADE PRACTISE

### 1.1. Client awareness and advice

IP attorney firms are committed to engage in pro bono awareness actions, to advise their clients proactively and to deliver customized advice thereto.

Does your firm propose an initial free appointment to your new clients?

- Never
- Sometimes
- Often
- Always

Does your firm organize awareness actions other than the permanencies provided by the French Patent and Trademark Office (INPI)?

- No
- Yes, free of charge
- Yes, against payment



**What awareness actions have you implemented during the base year?**

- Voluntary actions (e.g. conference followed by free personalized advice)
- Blog / social networks (information about IP, action/strategy of an IP attorney firm, initiatives conducted, results obtained, etc.)
- Training courses intended for clients or prospects
- Activity within generalist professional bodies: MEDEF, CGPME...
- Forensic expertise
- Teachership

**Did the IP attorneys of your firm write any articles and/or works during the base year?**

- No
- Yes, occasionally
- Yes, this is part of the firm's policy

**Do you know the amount of time your firm spends per year on awareness (publications, training, etc.), including preparation actions? State the average number of hours per IP attorney for the base year (see the reference in the introduction of the questionnaire).**

- Yes, we have a dedicated indicator (time-spent meter)
- No, not exactly

**To what extent are you proactive regarding your clients' needs?**

**Concerning the watch performed by your firm...**

**What type of watch do you perform?**

- Monitoring of trademarks, registered designs, patents, domain names, social network reputation
- Legal watch (development in regulations and case-law)
- Technology watch (an essentially scientific and technical content obtained via databanks that are used by searchers and engineers)
- Competitive watch (observation of competitors)
- Other, please specify:



**What is the purpose of this watch, besides informing you?**

- Updating the team's knowledge is the main purpose
- Furthermore, free client information
- Furthermore, client information against payment
- Furthermore, marketing of a high added value expert service

**What is your approach?**

- Generalist watch
- Sector watch (pharmacy, aviation, luxury, etc.)
- Customized watch specifically developed for a client (criteria defined with such client on its strategy of the moment)

**Who is your watch intended for?**

- In-house teams
- Clients

**Who is watching?**

- In-house specialized staff
- IP attorney
- Specialized external service provider

**Did the persons conducting the watch follow any specific training?**

- No
- Yes, specify which one

**What are your views on business intelligence?**

- This is not my profession
- I think that this expertise should be developed
- I am considering a training course
- This skill is not fully used by my firm
- This expertise is highlighted by my firm



**Do you provide any (trademark or patent) mappings?**

- No, this is not my profession
- No, I subcontract
- No, but this offer could be developed
- Yes, it is one of our specialties

**Do you take into consideration the specifics of your clients' business line to intervene on a "customized basis"?**

- Not particularly
- Yes, definitely

**Do you have any suggestions concerning this part of the questionnaire?**

## 1.2. Optimizing the clients' strategy

Firm managers commit to ensure that such titles as are adapted to their clients' strategy will be granted.

**Where it exists, how do you make the IP strategy of your clients yours?**

- It is described to me by my usual non manager interlocutors
- It is described to me by the managers
- It is well known
- It is inferred through random exchanges

**Where it does not exist, how do you propose an IP strategy?**

- Indirectly, as the questions are asked to me
- Directly, by organizing a meeting dedicated to this strategy

**Do you have any suggestions concerning this part of the questionnaire?**



### 1.3. Valuation of intangible assets

IP attorney firms commit to set up a protection value-creating strategy, to propose business models based on IP to their clients and to inform them about IP taxation.

**Do you have any indicators that enable you to know the number of titles (initial filings, extension, etc.) you have filed during the past calendar year?**

- Instantly
- In a few minutes
- In a few hours
- No indicator

**What is the number of titles (patents, trademarks, designs) that have gone through a financial evaluation during the base year?**

**Do you consider that...**

- Evaluating IP titles is not part of your profession (the client is already addressing a third party / you advise a qualified professional to your client)
- You are subcontracting the operation
- You want to gain the necessary expertise to expand this business
- Your firm is specialized in evaluating titles

**Are you involved in determining your clients' strategy to use the titles?**

- Very rarely
- Sometimes
- Regularly
- Often
- Systematically

**Do you play a part in the writing of license, distribution, and franchise agreements?**

- Very rarely
- Sometimes
- Regularly
- Often
- Systematically



Do you provide your clients with Research Tax Credit consultancy?

- Yes  
 No

Do you consider that this is a skill you should acquire?

- Yes  
 No, not useful  
 No, I already have a good knowledge of the mechanism

What are the financing or financing aid mechanisms you are advising your clients?

- None  
 Others, please specify



Do you have any suggestions concerning this part of the questionnaire?

#### 1.4. Managing disputes

Firm managers commit to steer the litigations and pre-litigations of their clients in their strategic and economic interest by advising an appropriate defense or attack strategy.

Do you have a team dedicated to managing disputes?

- Not applicable (see size of my firm)  
 No, it is not necessary  
 No, but we are planning to have one  
 Yes

Are you planning to take action before the JUB?

- My firm is unconcerned (Trademarks)  
 Initially Yes  
 Initially no  
 I do not know



How do you capitalize on the experience?

- Discussions among the partners and/or within the team
- File management
- Data content creation (common databases)
- Other, please specify

In the case of lengthy disputes, how do you organize yourself to cope?

- Setting up of an in-house team
- Multiple firm organization
- Outside lawyers
- I plan to set up a multi-disciplinary structure, to this end in particular

Do you have any suggestions concerning this part of the questionnaire?

### 1.5. Turning to a forward-looking perspective

Are you anticipating a possible deregulation of the IP attorney profession?

- No
- Yes

Do you fear a “~~uberisation~~” of your industry sector (emergence of a revolutionary business model using digital technology and establishing itself as an intermediary between you and your clients)?

- No
- Yes

## 2. ACTION AT INTERNATIONAL LEVEL

Firm managers commit to promote awareness of international agreements as well as a multicultural and multilingual environment. They commit to ease transnational exchanges throughout a network of choice correspondents.



**Which languages are spoken in your firm?**

- English
- German
- Spanish
- Italian
- Portuguese
- Arab
- Dutch
- Japanese
- Chinese
- Other:

**Have your employees been offered any language classes during the base year?**

- No
- Yes

**If not, why?**

**Which nationalities, besides French, are present in your firm?**

- None
- English / American
- German
- Spanish
- Chinese
- Other:



In which international association(s), other than the FICPI, has your firm been active during the base year?

Have any members of your firm intervened abroad during the base year?

- No
- Not much
- Often

Do you have a tool that follows-up the quality of the services provided by the foreign correspondents working for your firm?

- No
- Yes

Please specify how often a manager of your firm visits its network of foreign correspondents (where several managers, please establish an average):

- Less than once a year
- Once a year
- Over once a year

Is membership of the FICPI a key consideration when you select your foreign correspondents?

- No
- Yes

You primarily select your correspondents on the basis of (tick off 2 choices):

- Reciprocity
- Reputation
- Tariff
- Effectiveness
- Response time
- Local network



Do you have any suggestions concerning this part of the questionnaire?



### 3. ADMINISTRATIVE RELIABILITY AND DATA SECURITY

Firm managers commit to secure administrative procedures (objective zero defect).

Do you train your employees to manage your database?

- No
- Yes

Is there some kind of procedure for tracking and solving administrative errors?

- No
- Yes

Do you have a meaningful process for validation by an N+1 / senior or a double check?

- No
- Yes

Do you have information security for your server and for remote- and site-based workstations?

- No
- Yes

Do you have any data back-up measures?

- No
- Yes

Where is your data hosted?

- In-house
- In-house with a back-up by a service provider
- Over an external network, in France
- Over an external network, in Europe
- Over an external network, outside Europe
- Over an external network whose geographical location I do not know



**Where is your messaging hosted?**

- In-house
- In-house with a back-up by a service provider
- Over an external network, in France
- Over an external network, in Europe
- Over an external network, outside Europe
- Over an external network whose geographical location I do not know

**Do you have a disaster recovery plan?**

- No
- Yes

**Do you have any suggestions concerning this part of the questionnaire?**

#### 4. CONFIDENTIALITY

Firm managers commit to extend the confidentiality obligation to all staff throughout the employment contract and after the end of the contract.

**Is there a confidentiality clause in your employment contracts?**

- No
- Yes, for IP attorneys
- Yes, for all employees

**Do external service provider contracts and subcontracts contain a confidentiality clause?**

- No
- Yes, sometimes
- Yes, systematically

**What is your privileged mode of communication for confidential documents (patent texts prior to filing, etc.)?**

- Relatively unconcerned (Trademark and registered design firm): simple email, simple mail and fax



- According to client request
- Messenger or registered mail with postal receipt
- Secure emails
- Transfers via FTP server
- Others (please specify)

**Do you have meaningful secured procedures for exchanging confidential documents?**

- No
- Yes

**Did you set up a secured (encrypted) back-up?**

- No
- Yes

**What are your procedures and/or tools for destroying confidential documents?**

- No particular procedure
- In-house shredder
- Specialized service provider

**Do you have any suggestions concerning this part of the questionnaire?**

## 5. CLIENT SATISFACTION

Throughout the provision of services, the firm managers commit to ensure client satisfaction, to consider any opportunity to improve the provision of services, to respond promptly and to make every effort in case of emergency.

**Does your firm have a computerized follow-up tool and scoreboard for monitoring procedural deadlines?**

- No
- Yes



Which information do you wish to collect on the follow-up and the scoreboard?



Do you organize satisfaction surveys with your clients?

- No  
 Yes

If so, how do you do that?

- Informal exchange within a trusting relationship  
 Sending out of a questionnaire including proposals for marking the service/firm and for assessing it  
 Telephone call or specific appointment  
 Complete procedure: sending out of a questionnaire and/or interview to answer the questionnaire, thorough analysis of the results, definition of remedial actions, information transmitted back to the client and follow-up

How often do you conduct client satisfaction surveys?

- No survey, strictly speaking  
 Once every 2 to 5 years  
 Once a year  
 As soon as the service has been provided

What type of actions do you take following the analysis of the satisfaction surveys?

- NTR  
 Specific attention paid to disappointed clients  
 Analysis of the problem in order to correct the malfunctioning / alter the procedures  
 Going back to the client with information / proposals

Do you have an Internet site?

- No  
 Yes, a storefront site featuring the firm: fields of expertise, team, contact details, etc.  
 Yes, a blog site that is periodically updated (watch, feature articles)



Yes, an interactive site which makes it possible to request an estimate, to obtain rapidly advice for the first time, to refer to the firm regarding a case, etc. (e.g. the site of the law firm SoLegal)

**Do you use the social networks in your relationships with your clients?**

- No  
 Yes

**Are you certified ISO 9001?**

- No  
 Yes

**Do you have any suggestions concerning this part of the questionnaire?**

## 6. PUBLIC INTEREST

The IP attorney firms commit to contribute to the collective thinking and works of the ACPI and of the other sector organizations; and otherwise, to be proactive in favor of a protective and harmonized European law.

**What is the average number of days per IP attorney that your firm spends during the base year on participating to professional IP organizations (ACPI, FICPI, EPI, AIPPI, etc.)? See the reference in the introduction of the questionnaire.**

**Have you addressed one or more proposals of subjects to the ACPI during the base year?**

- No  
 Yes

**Have you participated in an ACPI and/or FICPI working group?**

- No  
 Yes



Have you participated in or volunteered to answer a questionnaire within the context of the ACPI and/or FICPI?

- No
- Yes

How many IP attorneys of your firm are active within professional organizations (APRAM, CNCPI commissions).

- Less than one out of three
- Few, as most of them are quite inexperienced
- In general, all IP attorneys with more than ten years of experience are active within professional organizations

Do you have any suggestions concerning this part of the questionnaire?

## 7. HUMAN RESOURCES

Firm managers commit to recruit high-level academic professionals who can accompany managers, searchers, engineers and experienced jurists.

What is the level of schooling attained by your administrative staff?

- High School Diploma (HSD)
- HSD + 2
- HSD + 3
- HSD + 5
- Other, please specify

Do you have any diploma-based training course initiatives (CAB, CAM, VAE)?

- No
- Yes



What is the percentage, as calculated for the overall staff, of IP or European attorneys within your firm?



How many engineers and jurists undergoing qualification are there in your firm?

- There is always at least one engineer or jurist undergoing qualification in my firm
- The structure of my firm does not enable me to have at all times an engineer or a jurist undergoing qualification
- Whenever possible, I recruit individuals who are already qualified

Entering candidates for an IP or European attorney qualification examination.

- I enter a candidate for a professional qualification examination whenever he wishes and satisfies the formal experience criteria
- I enter a candidate for a professional qualification examination whenever his situation within the firm allows for it

How do you see management training?

- Impossible or anecdotal because of lack of time
- Necessary but it is difficult to find time and/or to provide the means for any complementary training
- Acquiring new skills is a key factor, a budget is set aside

The need for management training

- No particular need identified
- Business intelligence
- Evaluation of titles
- Client relationships / marketing strategy
- Foreign languages
- CSR
- Digital technology (tools, software programs, databases, social networks)
- Management (overall: self-management skills and know-how)
- Action before the future JUB?
- Other, please specify





Do you have any suggestions concerning this part of the questionnaire?

## 8. GOVERNANCE

Firm managers commit to establish governance based on the values of the profession, to get involved in their day to day practices and to emphasize the labor value over the capital. They commit to promote access of their employees to stock ownership.

Would you say that you are somewhat (your personal view with complete objectivity of your current situation):

- An expert who has had to surround himself
- A partner who holds shares in the firm
- A manager
- An entrepreneur
- A leader driven by a vision that determines his strategy

What is your mode of management?

- Hierarchical
- Collaborative
- Other, please specify

In what age group is the youngest manager/partner of your firm?

- Less than 30 years old
- 30-35 years old
- 35-40 years old
- 40-45 years old
- 45-50 years old
- Over 50 years old



**What percentage of your managing body are women?**

You are running a Trademark firm, indicate the percentage:

You are (mainly) running a Patent firm, indicate the percentage:

You are running a firm which is equally expanding both activities, indicate the percentage:

**For you, what is the Y generation?**

- I do not know
- A generation that has little or no presence in my firm
- A generation that is difficult to manage
- The prospect of a change of paradigm
- A growth opportunity
- A generation that is represented among the managers

**Are there any social products in your firm?**

- No
- Yes, supplementary health insurance fund
- Yes, supplementary health insurance fund and disability-incapacity death coverage fund
- Stock purchase plan
- Profit-sharing
- Yes, others (please specify)



Please state the form of incorporation of your firm (SCP, SARL, SAS, SA...)



Do your employees benefit from access to the capital of your firm?

- No
- Yes

If so, please specify the five main criteria of access to the capital of your firm for employees (mark a maximum of 5 priorities).

- Faithfulness, loyalty
- Inter-personal skills (excellent integration within the team)
- Professional performance: capacity for hard work, speed, excellence
- Rare or particularly significant expertise
- Ability to develop the clientele (good communication, network attitude)
- Marketing and client relation skills
- Digital expertise: ICTs, social networks...
- Sense of innovation and ability to expand a new business model
- Strong business-oriented approach
- Innovative and positive leadership for the firm
- Original curriculum: dual or triple training courses
- Foreign nationality or experience abroad that may help the firm expand in France and/or abroad
- Sales generated
- Professional degree obtained (Trademark attorney, Patent attorney, EQE, soon JUB)
- Seniority in the firm
- To avoid the departure of an important client
- Number of existing partners
- Need to relieve the existing partner

At which time do the partners dispose of their shares?

- During their working life
- At the time of retirement
- At any time to avoid the departure of a candidate that may possibly become a partner



How do you proceed regarding the decision-making power?

- One man, one vote
- Proportional to the capital held

Do you propose any intermediate positions between the employee and the partner to the share capital?

- No
- Yes

If so, which ones?

If so, for what purpose?

- Gain employee loyalty
- Antechamber for the association

For you, innovation is?

- My clients' business
- Does not really concern my business
- A need for the profession
- An obligation to increase sales
- An utmost urgency treated as such by the managing team of my firm

Do you promote innovation in your firm?

- Not particularly, I have other priorities
- Yes, we regularly exchange our views on this subject among partners
- Yes, we give our business associates time to develop an innovating project (e.g. one day/week)
- Yes, we have set up procedures to promote innovation
  - Yes, we have defined a strategy and we are investing in innovation

Do you have any suggestions concerning this part of the questionnaire?



## 9. ETHICS & TRANSPARENCY

Firm managers commit to clarify the structure of the prices charged compared with the services provided and to explain IP procedures and law to their clients for a better understanding and fluidity of IP attorney-client relationships.

**How do you forestall the risks of conflicts of interests?**

**Does your firm provide rates that are available for consultation on client request?**

- No  
 Yes

**Does your firm systematically provide estimates?**

- No  
 Yes

**Does your firm have general service conditions?**

- No  
 Yes

**Do you have any suggestions concerning this part of the questionnaire?**

## 10. SUSTAINABLE DEVELOPMENT

Firm managers commit to implement a CSR approach. They commit to consider the impact of their actions upon communities, people and activities.

**For you, what is CSR:**

- I do not know precisely, but I believe that it does not really affect me  
 An extra cost that my firm cannot afford  
 I want to know more to be able to act: purposes, approach, tools, service providers...  
 A lever of performance  
 The occasion to reshuffle the cards: strategy, relationships, organization...  
 A request from some clients



Do you have a CSR approach according to the ISO 26000 standard in place?

- No
- Yes

#### 10.1. Diversity and vulnerable groups

Firm managers commit to respect all individuals without discrimination of any kind, act fairly, ensure social diversity and fight inequality.

Do you ensure that a social mix is promoted within your firm?

- Yes
- No
- Not measurable

For the same position is there a difference in the average earnings between men and women within your firm?

- Yes
- No
- Not measurable

What steps did your firm take to promote diversity?

Do you employ people with disabilities?

- No
- Yes

Do you resort to authorized workshops?

- No
- Yes

Do you pay the Agefiph tax?

- No
- Yes



Do you have any suggestions concerning this part of the questionnaire?



## 10.2. Specific business-related risks

In your opinion, which one of the following levels of risk would you give your firm?

1 / Risks of structure precariousness (risks related to the cohesion of partners and/or to the transmission of the structure)

- High
- Medium
- Low
- Non-significant
- Uncontrollable

2/ Criminal or civil risks related to the complexity or to the volume of legislative changes concerning the operation of the structure

- High
- Medium
- Low
- Non-significant
- Uncontrollable

3/ Risks of sudden reforms of the organization of the industrial property stakeholders in France and in Europe

- High
- Medium
- Low
- Non-significant
- Uncontrollable

4/ Risks of obsolescent working practices, skills, knowledge in the structure

- High
- Medium
- Low
- Non-significant



5/ Risk of loss of a key individual

- High
- Medium
- Low
- Non-significant
- Uncontrollable

6/ Risks of distortion of competition, of misappropriation of clientele

- High
- Medium
- Low
- Non-significant
- Uncontrollable

7/ Risks of losing data

- High
- Medium
- Low
- Non-significant
- Uncontrollable

8/ Organizational risks (depression / burn-out / turn-over, etc.)

- High
- Medium
- Low
- Non-significant
- Uncontrollable

9/ Sedentary work-related risks (musculoskeletal, visual troubles, etc.)

- High
- Medium
- Low
- Non-significant
- Uncontrollable



### 10.3. Environmental issues

Have you taken steps to promote ecoinnovation or innovation as regards ecological transition (e.g. appropriate pricing, IP or pro-bono awareness-raising actions that are specific to this area, organization of an ecoinnovation competition, etc.)?

- No
- Yes

Quote your good practices with regard to sustainable development (not limited to consumption and waste reduction):

Do you have any suggestions concerning this part of the questionnaire?

### Appendix – Learn more about you

Please state the name of your firm. This information will be kept confidential.

Please state the total staff of your firm (partners + employees + regular consultants)

Please specify the number of Trademark Attorneys.



Please specify the number of Patent Attorneys.

What do you expect from the ACPI (possibility to opt for a maximum of 4 answers responding to your priorities)?

- Information
- An access to other managers of IP attorney firms in order to exchange views among colleagues (conviviality / sharing of experience / confraternity)
- Joint work in order to develop joint solutions (sharing thinking and developing a profession strategy at employer level)
- Targeted training courses / conferences (presentations by experts, Breakfast sessions of the ACPI...)
- A corporate and media communication on the expertise and action of IP attorney firms
- Stances aiming at the defense of interests of IP attorney firms
- FICPI access (access to international information, premises of transnational thinking and network development)
- Access to business networks: clients, subcontractors, service providers, possible future partners...
- New business opportunities: new business models, development of partnerships, via the COP 2017-2020...



# Cartographie

des cabinets de Conseil en Propriété Industrielle  
signataires de la Charte nationale qualité IP Excellence

2016

réalisée par le cabinet AleVia Conseil

Objectifs de la Charte IP Excellence  
Analyse des données 2015  
Et demain ?  
Principaux enseignements  
Propositions d'actions



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Only 50% of the PTA questioned consider that the evaluation of titles is a specialty of their firm. The others wish to acquire the necessary expertise to develop it. 20% address a third party to satisfy the requests of their customers.

### Do you consider that...

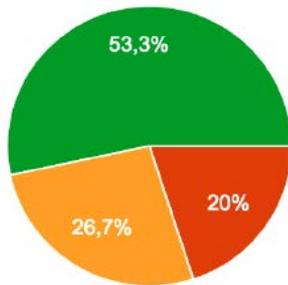
*Evaluating IP titles is not a part of your profession (the client is already addressing a third party / you advise a qualified*

*professional to your client) 0 %*

*You are subcontracting the operation 20 %*

*You want to gain the necessary expertise to expand this business 26,7 %*

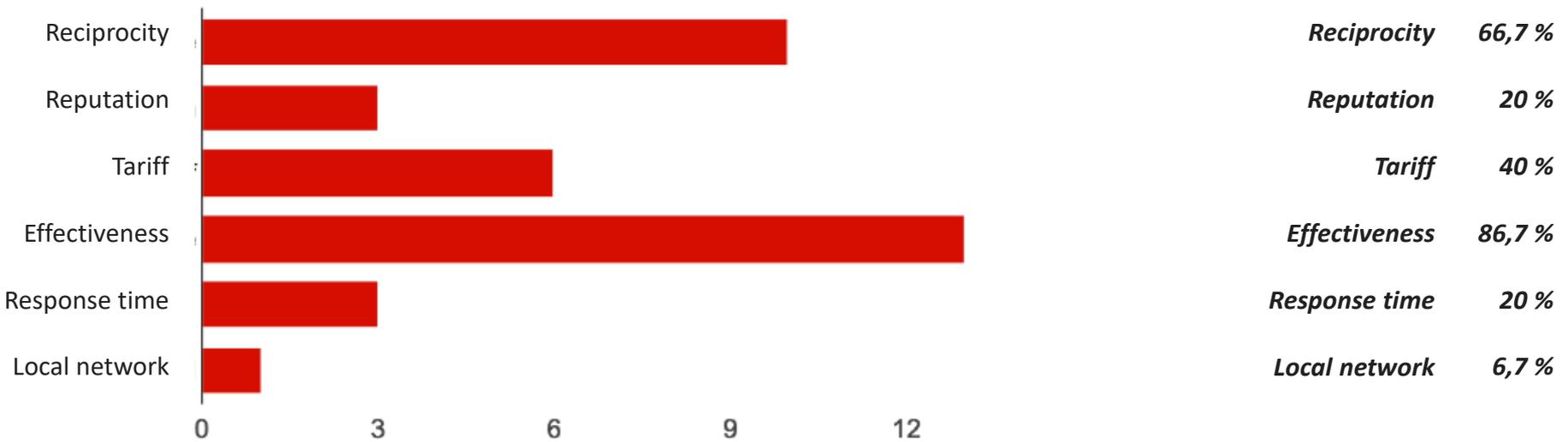
*Your firm is specialized in evaluating titles 53,3 %*



**Professional opportunity : evaluation of titles should become an important expertise of firms in order to develop an additional sector of activity. To this end, it may be useful to better promote this additional offer, with a proactive approach. Regarding the comments, it appears in fact, that the service is not often asked for.**



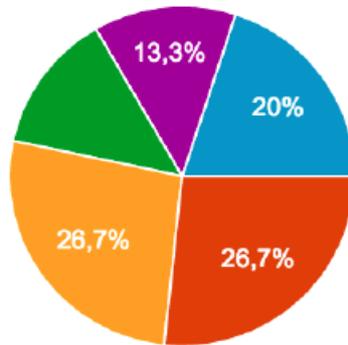
You primarily select your correspondents on the basis of (tick off 2 choices) :



**Should ACPI recommend a procedure for the choice and the follow-up of the services of foreign associates ? In the interests of the profession, should ACPI invite FICPI to work on that question in order to promote high value-added cooperation at an international level ?**

27 % of firms have “junior” partners, aged between 30 and 35 years old thus representing the Y generation.

### In what age group is the youngest manager/partner in you firm ?



*Less than 30 years old*      0 %

*30-35 years old*      26,7 %

*35-40 years old*      26,7 %

*40-45 years old*      13,3 %

*45-50 years old*      13,3 %

*Over 50 years old*      20 %

This generation called “digital native”, which is absent or not very present in 47 % of the firms, appears however as a prospect for paradigm change (27%) and lever of growth (13 %), despite certain misgivings: two leading firms consider this generation challenging to manage.



## Female percentage in your managing body

What is the percentage of women in your managing body ?

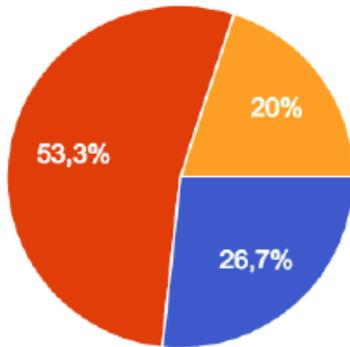
Apart from four firms which are only managed by males, the average fluctuates between 33 and 50 %. A PTA firm, more particularly specialized in Trademarks, has a managing body percentage of women at 78 %.

Please note that one-person firms or with two partners only, are male.

Women focus on team working, and are found in larger organizations.

Usually, partners dispose of their shares at the time of retirement. The sale of shares occurs also during working life, to prevent even an employee's departure.

### At which time do the partners dispose of their shares ?



*During their working life* 26,7 %

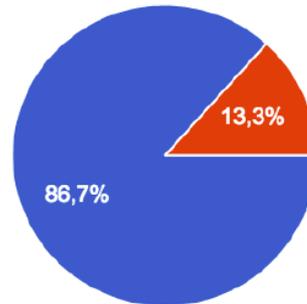
*At the time of retirement* 53,3 %

*At any time to avoid the departure of a candidate that may possibly become a partner* 20 %

The existence of an intermediary status between employee and partner is rare. The employee identified by managers may take part in work groups in order to communicate with the management in a privileged setting or he/she may enjoy the status of junior partner.

The aim is to retain the loyalty of the employee.

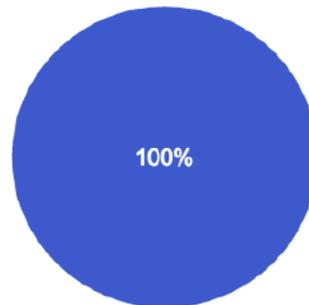
**Do you propose any intermediate positions between the employee and the partner to the share capital ?**



**No** 86,7 %

**Yes** 13,3 %

**If so, for what purpose ?**



**Gain employee loyalty** 100 %

**Antechamber for the association** 0 %



## Work to be done

- Specify key indicators of the profession to facilitate quality action, individual or group decisions and growth of the sector;
- Focus on continuing professional training of business leaders to enable them to adapt their offer, increase their income and make the necessary investments;
- Promote PTA firms proactivity with a business development approach;
- Act in startup mode : innovate, test, adapt, etc. ;
- Promote a foreign associate network which is more efficient, and able to make proposals to FICPI.

## Benefits of the Charter

- Training scheme better suited to the firm's strategy
- Enhanced service offer
- Attractive social commitment
- Strengthen collegiality by sharing experience
- Better performance of French IP firms





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- **The Quality Charter of ACPI was presented to the ExCo of Zurich**



- **Platform to share experience (ex : with the Netherland Group)**





**Thank you for your attention!**  
**Questions are now welcome.**