



















## Customer Visit Programme (CVP) – Positives and Future Challenges

### The Benefits

The CVP has been a very positive exercise that has achieved its goals in a cost effective manner in its first year to date. Notably:-

- The new CVP has combined purpose with structure to deliver customer intelligence, engaged and appreciative customers and an excellent platform to involve customers in service design and development.
- The CVP has confirmed the views identified in the journey mapping project of the IPO and in the Examining corps.
- On a softer side: It has helped build and reinforce IPO-customer working relationships between examiner and formalities at all levels and strengthened our collective internal levels of customer empathy and focus.

### The Intelligence

It has also provided substantial intelligence in several specific areas:

- Confirmed the move to a six month target is an acceptable maximum
- Raised the Profile of the PPH
- Obtained a wide range of views on Search and Examination practice
- Made a substantial contribution to the debate on Superfast Patents
- Received a wide range of views on the Unitary Patent
- Raised the profile of the Opinions and Mediation services
- Sought views on a number of issues raised by the Patents Roadmap
- Raised awareness and sought views for the development of the E-Services programme
- Developing “Customer Profiles” as a potential new product for Informatics
- Developing a “Why file your patent application at the IPO?” leaflet.



## The Challenges

The perceived success of the programme has though raised some significant challenges that will need to be met in the forthcoming year:

- Maintaining the relationships developed over the initial round of visits
- Effectively handling and dealing with the issues raised on Search and examination practice
- Effectively dealing with the issues raised on Opinions and Hearings
- Managing raised expectations especially from the Patents Roadmap
- Building on the enthusiasm shown by attorneys for E-Services
- Managing visit resources effectively
- Developing a cohesive visit plan for the forthcoming year

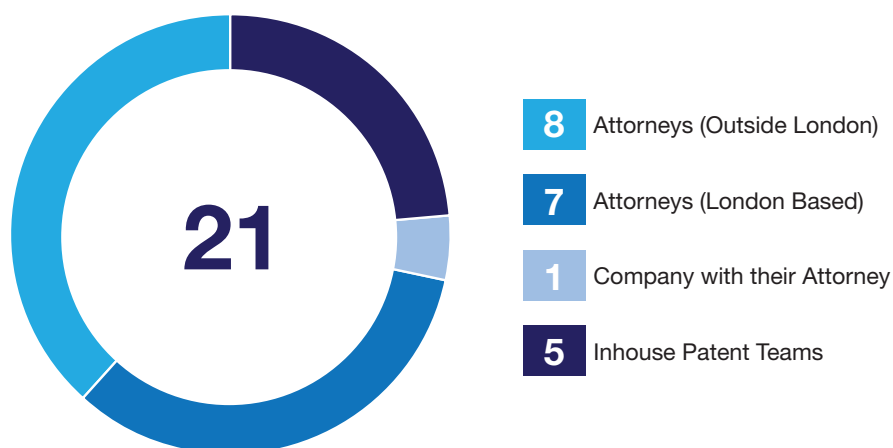
## The Visit Programme

### Customers: Numbers and Type

As of 30th September a total of 21 visits or discussions had been held with customers of the IPO. Of these 19 were held at the customer's premises, one was conducted by phone and one at the IPO.

In terms of customers we met:-

Total number of visits or discussions



### Japanese Company Day

As part of the activities of the CVP team we were asked by JETRO<sup>1</sup> to host an information day for a number of Japanese Companies on 26th July. Following the success of the day we are now considering how this model can be adapted for hosting other business groupings.

### Customer Profiles

Working with our Informatics team<sup>2</sup> we have developed a profile representative of the customer's filing activity with the IPO. This has proved to be very popular with our customers who appreciate the information being shown. In several cases it was suggested that this might be a possible service/product that could be provided by Informatics. An example profile can be found at the end of this report.

<sup>1</sup> Japanese External Trade Organization

<sup>2</sup> <http://www.ipos.gov.uk/informatics>



## The Visit Team

The Visit team comprises a number of Senior Patent Examiners and staff from our Formalities teams. The team also includes a number of Home workers which has allowed us to visit customers all over country.

All members of the Visit Team attended a training day to hear a series of presentations by the Policy leads for the IPO. This was designed to complement the briefings provided and to be able to ask questions to clarify any misunderstandings. All those who attended rated the day very highly and useful. The model for the day is now being considered by some sections as a model to provide a greater understanding of the role and function of the IPO beyond their own area to staff.

Each visit was led by a senior examiner. In almost all cases they were accompanied by a member of staff from Formalities. In most cases the meeting was also attended by someone from the Patents Roadmap Team and/or the Customer Insight team. This allowed us to deal with issues arising not only around patents but also gave us the opportunity to gauge customer opinion on developments being considered as part of the Roadmap and E-Services project work.

## Reputation, Attorney Relationships and Examiners

Our meetings have shown that the IPO is held in high regard by the Patent Profession. We are very much seen as an efficient office having professional staff with high standards of quality. Many attorneys were very appreciative of our visit and asked how they could help us.

In several cases Attorneys have asked to become more involved with the IP Audit scheme, whilst others have sought our involvement in a number of events they are organising or sponsoring.

The visits have clearly established a good relationship with the attorneys visited. It will undoubtedly be a challenge to maintain these relationships and build on them for the benefit of the IPO.

Having Home workers on the CVP team has been particularly beneficial. This has allowed us to visit firms in areas of the countries that have not always been easily accessible without a corresponding increase in costs. In one case it was the first time one firm had been visited in 10 year whilst another made a specific offer to work with the IPO in the future at events in the North West of England.

### Examiners

A recurring theme throughout the visits has been the views our customers hold of the IPO Examiners. In most cases their approachability and willingness to speak to the attorney was praised as a significant plus for the IPO. This is important to us and confirms the views of attorney firms expressed in the recent Customer Journey Mapping work completed by the Customer Insight team.

### Examiner Training

It was clearly recognised, especially amongst in house patent departments, that whilst Examiners had good technical skills it was necessary for them to keep abreast of technical developments in an area. This has led to offers of specialised training from several of those customers visited which we will be taking up.

We are proud that our Examiners are seen in such a good light. We appreciate the offers of training and are working to follow these up.



## Search

### Search Target

The view of attorneys on the revised search target of 6 months was sought on every visit. In a few cases there was some dismay that we had moved to a six month target. However, the overall feeling was that six months was acceptable but with the caveat that it should not be allowed to slip any further.

Amongst the attorneys it was felt that the speed and quality of our search was a key factor in using the IPO.

### Quality of Search

The quality of our search was considered to be generally good. However, on a significant number of occasions the view was expressed that other offices, particularly the EPO, find better citations. The view was expressed that this was not helpful especially if the UK Search report had identified no novelty or inventive step citations. For many attorneys this could cause problems with clients

### The Search Report

A common theme amongst attorneys was the level of detail on the search report. Many attorneys asked for more information on the report or in the accompanying letter to help them understand the citations in the report.

### Examiner Opinions v Combined Search and Examination

In response to these comments we asked for views on whether an Examiner opinion would provide the information they needed. There was no clear view, one way or the other, whether an Examiner Opinion should be issued on every case. Many found them helpful but in some cases the lack of information undermined the effectiveness.

In general most attorneys made it clear that if they needed more information about a case at an early stage they would use the Combined Search and Examination route.

## Indication of allowable Claims

A number of attorneys suggested that it would be useful to see a summary of which claims would be considered allowable as is seen in the International reports. The general opinion was that this would be helpful to both them and their clients in determining how to proceed with the prosecution.

### Claim 1 at least

A significant bone of contention on many visits was the use by Examiners of “Claim 1 at least” on search reports. Almost universally this was seen as unhelpful. Furthermore, in some cases attorneys commented that the citations were actually considered not to read onto claim 1 in any case. This was seen as “lazy”, impacted on the costs of the client and undermined our reputation. However, no specific examples were provided by attorneys.

At visits it was explained that the Manual of Patent Practice (MOPP) allows the use of claim 1 at least and that it was not widely used. It was further explained that when used it was usually as a result of a broad and speculative or unclear claim which made it difficult for the examiner to identify how the application would proceed. This issue has been raised with our internal quality team.

## Quality of Search

We believe the quality of our search is comparable with that of the other major Offices in Europe. The quality of our search reports is continually assessed as part of our Quality Assurance process. During 2012/13, we achieved good customer service in 96% of quality assessed actions. Our benchmarking studies show that, whilst we do not always find the same citations as the European Patent Office, we often find equivalent or alternative citations of equal relevance. Wherever possible, examiners are encouraged to include citations which illustrate the background to the invention or aid in its understanding as well as those relevant to novelty or inventive step. Examiners are provided with the most up-to-date search tools and regular training to ensure that their skills are of the highest standard.

## Examiner opinions v Combined Search and Examination

We have considered the possibility of issuing examination opinions with search reports and whilst we can see the potential value to our customers, the current level of demand for our services means that it is not possible to do so at this time. Applicants who require more detail regarding the relevance of citations are always welcome to request a combined search and examination.



## Claim 1 at least

We appreciate that the use of “Claim 1 at least”, can often seem unhelpful. We continue to emphasise to examiners that this should only be used in exceptional circumstances where the claims are broad or speculative, lengthy or unclear and should not be regarded as the norm.



## Examination Issues

### Examination Reports

These are considered to be generally good and are well regarded by the attorney community. There were, however, comments passed that we do not always get the audience right and that sometimes we make objections that are ultimately unsustainable. The view of one attorney that “some are very good but some are very bad” is perhaps something we should regard as salutary.

Several comments were also passed that it would be useful for reports to deal with novelty and inventive step on a claim by claim basis. On discussion this appeared to be more prevalent a view when the applicant was US based who would appreciate a similar report to that issued by the USPTO.

### Amendment Targets

Several attorneys did not welcome the move to a two month amendment target. They were however unable to offer an alternative suggestion.

### Divisional Applications

The issue of divisional came up in about a third of the visits. Amongst the comments was a request to include a standard paragraph in any report or letter stating the last possible date for filing a divisional request. There were further suggestions that the “three month” rule could be relaxed and that compliance dates be relaxed for a divisional application. This was tied into the view that many examinations now take place within the last 12 months of the compliance period.

The EPO approach to divisional applications was also raised and we were asked that whatever we do could we mitigate that approach.

Although we appreciate that providing more detail on novelty and inventive step of individual claims could be useful there is a need for examiners to be pragmatic in how they process a case – particularly where there are large numbers of claims. The intention is to continue with current practice as set out in MoPP paragraphs 18.43 and 3.63. This means listing which objection is made to which claims but only going into detail about independent claims unless additional explanation is needed e.g. about how the examiner has interpreted something.

As many examinations now take place within the last 12 months of the compliance period, filing divisional applications on time can be problematic. We agree that the IPO should look into divisional deadlines generally and as a consequence the foreshadowing issue. In particular the link between the compliance date and the deadline for filing divisionals will be reconsidered. The IPO would consult on any proposed changes and the next Rules package could provide an opportunity to make changes.

## Treatment of Excluded Matter

The treatment of excluded matter was a significant topic of conversation at many visits. On a plus side the new process of ensuring an Examination Opinion was issued alongside a report issued under 17(5)(b) was welcomed. It was also suggested by at least one attorney that a paragraph should be added to the accompanying letter making it clear that the search report applied only to the UK and not other jurisdictions.

The overall approach and differences with the EPO were a major issue for several firms. A number of attorneys made it clear that the treatment of computer programs was a significant reason they did not file with the IPO. There were also views expressed that the approach taken by the IPO was legalistic. It was made clear that it was far easier to explain inventive step to clients rather than subjective nature of an excluded matter objection.

We were made aware through anecdotal comments that the difference in approach was undermining the value of UK companies. In one particular instance an American company was able to buy a UK company “on the cheap”.

Further comments suggested that our approach was possibly political and that we were slow to react to changes in case law and that approach relied too heavily on establishing a “technical contribution”. As a way forward there was a suggestion from a number of attorneys that a focus group for this area would be a useful forum for exchange of views and understanding between the attorney community and IPO.

We are considering including a sentence in the standard letter which accompanies a report under 17(5)(b) that this applies only in the UK and not necessarily in other jurisdictions. However, this doesn't appear to be a major issue for our customers and is a concept which attorneys are likely to be explaining to their clients as a matter of course. As noted later in this report, it is important that letters are targeted appropriately to the audience, explaining something which is self-evident to an attorney therefore seems unnecessary.

The IPO is bound by UK case law and so there are limitations to what extent the IPO can align its excluded matter practice more closely with the EPO.

Section 1(2) of the Manual of Patent Practice is in the process of being re-written to more clearly set out the current practice of the IPO in light of changes in case law.

A CIPA-IPO day seminar on excluded matter would be a useful way of teasing out issues and misconceptions in this area. This could build on the series of CIPA events where IPO staff have provided training on Excluded Matter.

## Formalities

An undoubted success in the current CVP has been the involvement of Formalities staff in the visits. This has allowed us to establish a relationship beyond just the attorney/examiner. Three subjects came up regularly on the visits:

### **a) Inclusion of a reference on every page**

In at least two cases the attorney was altering every page of a specification to include a page reference only for Formalities to remove it on receipt. The visits have allowed this practice to stop with a subsequent saving in processing time for both the IPO and the applicant/attorney.

### **b) Address for Service**

The profiles produced by Informatics use the address for service as a means of identifying applications for an attorney. This has been well received but it has raised the possibility that our data is not always accurate. In at least two cases Formalities were able to identify erroneous addresses for an attorney.


Changing the AFS was also commented upon and the removal of a confirmation of a change was raised. The lack of acknowledgement often left the attorney unsure of whether a change had been registered.

### **c) Treatment of Drawings**

The treatment of drawings was also raised on a number of visits with the view that they were being treated inconsistently across the office. Following the visits Formalities have taken action internally to rectify this in so far they can within the constraints of the current rules and technology. Possible longer term solutions have have long been on the radar of PD Legal and the Roadmap and e-services teams have noted the comments.

### **d) Assignments**

In recent visits a number of comments have been raised about the speed with which assignments are being processed. This criticism has been tempered by the view that if needed urgently a phone call will move the assignment forward. Management were well aware of the issue and have taken a number of measures which are already leading to greatly improved pendency times.



Address for Service – Stopping the acknowledgement of AFS applications has been a conscious decision in order to help save internal processing time to assist in reducing pendency times in the Register Maintenance team eg assignments. Notification of the change of practice was given well in advance of implementing it. Confirmation the changes have taken place can of course be checked on the website.

Drawings – Internal procedures have been revised to try and ensure a consistent approach and possible future legal and IT changes have been noted.

Assignments – We are aware of the issues and improvements have been made to reduce pendency times. Urgent requests will continue to be acted upon as soon as possible.

Formalities engagement in the CVP has proved very successful and will certainly continue.

## Filing Strategies

The programme of visits has been able to gain an understanding of various patent filing strategies. There is no doubt that the Customer Profile prepared by Informatics has assisted and facilitated these discussions. At all times we have stressed that it helps us if when filing a number of applications at the same time we can be told.

Many attorneys were open in how they file applications with the IPO. In many cases the main clients are often large multinationals and the main filing is with the EPO and/or a PCT application. For PCT applications a search at the EPO is preferred but several are now looking to Korea for speed.

The IPO is still considered a valuable option for PCT national phase. Primarily, this is as a result of delays at the EPO but our examination also provides useful indication of whether there is the prospect of a grant at the EPO. An exception to this is where the subject matter may be a computer programme in which case there may be no IPO filing.

Many attorneys use the IPO as a first search often with no real intention of carrying on to examination or grant. One attorney was quite open that for one of their clients this was a precursor to a convention filing and they would not mature to an examination.

The results of the search will almost always determine what happens next. If it is decided to continue then the most common approach is to file an examination request. However, some different approaches were taken if the search produced no citations which include filing a second application as a CSE claiming priority or filing the exam request early and requesting acceleration on grounds of wanting to use the PPH.

The more likely option for an IPO filing is to file a CSE at the outset. Almost all we spoke to said that this was the preferred strategy for UK based clients and particularly SMEs. The exam report provided more information than a basic search and allowed for a more productive discussion with their clients.

Whilst attorney filings are determined by the needs of the client, in house patent departments often adopt different strategies. From what we were told this will often depend on how important these are for the applicant. The more important using the IPO to determine if a PCT or convention filing is appropriate, those for a convention filings in limited states and those for domestic consumption. The one thing made clear by all was the need to proceed to at least publication in order to create a public document.

We are grateful to our customers for the information they have provided on their filing strategies. It has enabled us plan the resources we need more effectively ensuring we can continue to build on the high level of service we currently provide.



## PPH & International Applications

### PPH

The PPH has proved a fruitful discussion with almost all attorneys. On many visits we were able to use a presentation prepared by the PPH team for the training day as a means of starting a conversation. On several visits attorneys used this as CPD exercise which gave us the advantage of access to a wider audience for discussion. For the CVP in general this experience shows the value of providing some form of CPD training as part of the visit both opens doors but allows us to canvas a wider set of opinions.

The PPH has been used by many of the attorneys we have visited with varying degree of success. There is certainly an interest in its expansion with China and Russia coming up on a regular basis as countries where the attorneys would like to have agreements. Significant interest was also expressed in the idea of a plurilateral PPH as a way forward. When coupled with the IPOs speed of search and the ability to request acceleration on the basis of PPH this was considered to make the IPO very attractive to clients.

Almost all the comments about PPH were positive but two issues came up on several occasions. Firstly, there was a view that the office of second filing did not always take into account the UK claims. Secondly, there was some difficulty concerning what constituted an equivalent claims set when the scope of claims in the chemical and biological fields may differ due to different drafting rules in some jurisdictions.

### PCT

The PCT system was also discussed. At least two attorneys asked if we could become an ISA and there was a request for greater harmonisation of the law across the participating countries. There was also a call from one attorney for mutual recognition of FR and DE applications.

On a more domestic level two issues arose. Firstly, the process of the top up search, which is not always clearly understood. Several attorneys pointed out that as the EPO and USPTO are slow in providing an initial search many applicants are looking to use the Korean office. Whilst it is too early to gain a full picture of how effective this there was recognition that more documents are being found at top-up.

There was also a request from at least two attorneys for faster handling of PCT national phase applications. In particular, there was a view that these should be handled as CSE with an earlier examination than was currently the case.

## PPH

We are looking to expand our existing PPH network where there is applicant demand.

We are also working to make progress on a plurilateral PPH to simplify and improve the PPH system and to increase its use by applicants.

## PCT

We are working hard to improve the PCT system for applicants and offices, and we are currently considering how the comments on the PCT system could feed into this work.



## New Services

### Superfast Patent

On every visit up to the end of July, we canvassed for views on the Superfast Patent, a proposed premium service to enable the grant of a patent within 90 days of application. The views could be best described as ranging from cold to at best lukewarm with no one expressing anything approaching enthusiasm for the concept. Most found it expensive and could see it being of little or no use to them or their clients. Only in very specific cases such as biotech companies where early grant was often a way of maintaining or obtaining funding or perhaps infringement would it have been considered as an option.

In general the CSE route was seen as a better way forward more likely way forward especially since this could be accelerated if required.

There was also some disquiet expressed about how any such “superfast” service would be promoted. There was a fear that an SME would take it as an option without seeking advice and significantly undermine their IP position as a result. There was further disquiet about the effect any “Superfast” service might have on existing applications with comment made that it may further delay existing applications.

The comments made by Customers were passed onto the team working with on the Superfast Patent. These made a significant contribution to the ultimate decision to discontinue this idea.

### Patent Box

Most attorneys reported some interest in the Patent Box though none had seen an increase in filings to date. In some cases it was felt that this may be due to the graduated tax relief over the next few years making it not cost effective at the present time. One attorney made it clear that once the tax relief outweighed the cost of attorney fees then that may be a tipping point.

There was also some comment about how the Patent Box should be promoted. In particular, it was felt that the view of accountants and financial controllers would be key players in the uptake of the Patent Box and that they should be targeted.

Some attorneys did express some concern about how the Patent Box may operate. It was felt that the scheme may encourage SMEs to apply for a patent when their IP position may be better served by trade secrets.

We are pleased to see that there is significant interest in the Patent Box though we note that most of customers have not seen a rise in applications. IPO has already targeted accountants in its promotion of Patent Box and continues to do so. It has also provided training on Intellectual Property for tax advisers who will be dealing with Patent Box.





## Unitary Patent

The overriding message from attorneys on the Unitary Patent was one of suspicion. Much of this was directed at the possible costs and the court system. In terms of the court system, various objections were put forward including not wanting to be one of the first decisions, bifurcation and the “developing law” model used in Europe as opposed to the “precedent” based system of the UK. There was also some suspicion over the “opt out” procedures under Article 84.

There were also a number of comments about Spain and Italy not signing up for the Unitary Patent. This and the general nervousness led to an almost universal comment on the visits that they foresaw an increase in national filings in the short term.

The comments made by customers have been passed to the team working on the Unitary Patent for consideration.



## Opinions and Mediation

### Opinions

We were asked by the Opinions team to raise the profile of the Opinions service and where possible ask for views on the extension of the service. There were really two main opinions which tended to fall into those who had used the service and those who had not. For those who had used it, it was useful and they saw advantages to it. For those who had not, it was a case of either no need or they saw it as a disadvantage.

On the extension of the service there was some disquiet about the option for allowing the revocation of a patent. This provided two areas of concern, firstly that this was seen as an open ended opposition period and secondly that the procedures for revocation would need to be very clearly explained. It was clear that attorneys would like to see a clearly defined procedure for how revocation would occur.

We took on board the feedback and took every opportunity to explain the proposed process of revocation and this appears to have allayed most, if not all, of the concerns. However, the proposed legislation is currently undergoing Parliamentary scrutiny.

### Mediation

The updated mediation service was discussed at all visits though there was limited interest.



## Hearings

Hearing procedures came up on several visits. Few attorneys offered much information on them though in one particular instance there was felt to be a substantial need for changes, specifically in case management. They felt in particular that Hearing Officers often did not understand the subject matter they were adjudicating on and that attending could be seen as a waste of time. For them proof was in the lack of information in the decision on how they had construed the claim despite this being the first step of the Aerotel Test.

They did however suggest a way forward which coincided with the views of several other attorneys who wanted a case conference before a hearing was appointed. It was suggested that this should be attended by the Examiner and their supervisor (DD) with the aim being to decide how to move the case forward. Alternatively, there should be more scope for the hearing officer to make use of technically qualified people as an assistant who would take an active part in the hearing as well as an opportunity for greater discussion with the Examiner.

We share the view that a discussion between the Examiner and applicant is often the most effective way forward on managing an application. However, we are aware that this does not always resolve an issue and a hearing will become necessary. We are also aware of the valuable contribution an assistant can make in a hearing and have recently completed a training programme to ensure we have suitably trained hearing assistants available



## Patents Roadmap

The IPO Board have recognised the need to modernise the patents processes, and the associated IT systems some of which are over 20 years old. They also realised that this is an ideal time to review our customer products and services. With this in mind, the Board set up the Patents Roadmap Project to provide direction for the next three to five years by creating a flexible and adaptable Roadmap.

The Patents Roadmap project identified 165 opportunities for incremental improvement. These opportunities are derived from a comprehensive engagement process that generated over 1,000 suggestions from staff, and took into account over 1,000 comments from customers – including the results of a customer journey mapping exercise, and many customer visits. The CVP team has worked closely with the Patents Roadmap team and where possible a member of the Roadmap team accompanied the visit team. In their absence, the roadmap team provided a list of discussion points on which we were asked to gather views and opinions.

## Colour Drawings

There was universal support for the idea of allowing colour drawings in an application. The general view was that these would be especially useful in the Life Sciences, Chemistry and Computer Interfaces. In these cases the attorneys put forward the view that converting these to black and white drawings was difficult, expensive and the resultant loss of detail detracted from the application. The conversion to black and white drawings also gave rise to inconsistent objections from Formalities (see also at paragraph 41c above).

## Pay to Delay

There was significant interest in providing a service to delay the examination of an application for a fee. Most attorneys felt that such a service would be very useful to their clients particularly those in the pharmaceutical industry. They also saw an advantage to their other clients as it would allow some applications to be examined earlier.

## Section 20

The section 20 compliance period was generally welcomed as a good thing and should not be removed. Some attorneys made the point that one of the problems with the EPO is the lack of a compliance period which resulted in slow examination and the payment of fees before examination, which was felt to be unfair.

Some attorneys asked that the S20 period be made longer, though only one asked for it to be removed altogether. A more common request was for an extension of 18/24 months instead of the current 12 when an examination is completed after 3½ years.

## Renewals

There was no demand for altering renewals away from single year renewal payments.

## Citations and E-Correspondence

Through the visits it has become apparent that most attorneys either operate electronic file systems or are moving towards them. As a consequence they were looking to work digitally and viewed e-correspondence and e-citations as part of this. In terms of citations there was a general preference for a copy of the citation rather than a hyperlink to a document.

## Claims – Payment for excessive claims

This was raised at most visits. Most agents were ambivalent to the idea but where a view was expressed it was generally that our fees were so low that it would have no effect.

The comments of our customers have been very useful in understanding not only what is seen as important to them but also to take on board further ideas and suggestions in these areas. The input to the Roadmap from the visit programme will allow us to better prioritise those areas for development within the Roadmap project as a whole



## E-Services and Customer Insight

On many visits we were accompanied by a representative of the Customer Insight team. Whilst some discussion was held with the attorneys there was a strong emphasis placed on talking to Formalities' staff in the firm notably to capture views on emerging E-services development and to test E-Services prototypes.

### Case Handling Software

The Inprotech<sup>RTM</sup> software provided by CPA Global was very commonly used amongst firms of attorneys. This software is used by both attorneys and records management staff to manage the prosecution of cases. There was an expression of interest in adapting Inprotech<sup>RTM</sup> to provide a UK “press button” filing service. A number of attorneys have developed their own systems to meet their own requirements. In one case this is quite closely aligned with the IPO online service.

### Online Renewals

Customer Insight staff used Customer visits to provide working demonstrations of the online patent renewal service which is being developed through the E-Services project. This has received significant support and the feedback provided has been helpful in supporting the iterative development of the product. Users have indicated that it will be used primarily for one-off mid-month renewals.

### EOLF Software

The EOLF software is highly regarded even though some regard it as “clunky”. There was however little or no customer awareness of the planned move from the locally installed version towards a hosted interactive service. When made aware of this, there was a strong demand for it to continue to offer the ability to file UK applications at the IPO.

There was little appetite for a switch from EOLF to IPO webfiling to the extent that some would rather use paper and fax. One attorney also made clear that having two systems would increase both their costs and IT requirements and could be a significant factor in continuing to use the IPO.

### Digital Case File

Discussions revealed a strong push across most attorney firms visited towards digital case files – some in parallel with paper, for at least a period.

## MYIPO

Attorneys supported the proposed future development of an online facility that customers could log-onto to view and manage their pending cases and associated reports. Many provided suggestions that will be used to shape service design going forward.

## Customer Insight

The CVP has proved to be a useful vehicle for engaging with our customers in the definition and design of desirable service improvements and of new services. As a result of the visits Customer Insight has built up a growing resource of customer contacts. Many of these have expressed a willingness to support us in the design and testing of new systems.

We have been enthused by the universal interest that the attorney firms visited have shown in supporting our work to develop new online services. All customers have indicated they would be happy to support us in scrutinising and testing prototypes of new services. We especially appreciate the support we've had from the firms that have tested our online patent renewal service during its 'alpha' phase.

## Other Issues

### Third Party Renewal

This was raised by four attorneys who referred specifically to it as “the renewal scam”. Notably, this appeared to be raised more by attorneys outside London, whose clients were not multi-national companies. There did appear to be a general view amongst these that they would like the IPO to do more.

### IP Audits

The CVP has increased the number of firms involved in the IP Audits.

### Why file at the IPO?

A number of attorneys made it clear that it was difficult for them to sell the IPO to their clients. In particular, there was no one source or document that set out our unique selling points. At the same time they made the point that the new branding had proved very popular especially with companies in the Far East. As a consequence, the CVP team are looking at preparing a simple leaflet to meet this need.

### Trade marks and TM10

Several attorneys offered views on the TM10 project and in one case they requested a member of Trade Marks to join the visit team whilst a second asked for a visit to discuss trademarks only. All comments have since been fed back to Trade Marks for consideration.

### Government support for Innovation

Two attorney firms asked whether IPO could provide advice regarding the range of government grants and schemes available to support SME clients’ innovation and IP work.

IPO subsequently shared the following overview of support available to help business maximise the value of their IP:

**<http://www.ipo.gov.uk/business-support.pdf>**

The guide was very well received.

Why file at the IPO – We are actively looking at how we can deliver this for all our rights granting services.

As a result of these discussions, we are now considering how best to expand the customer visit programme to cover Trade Marks issues.

















