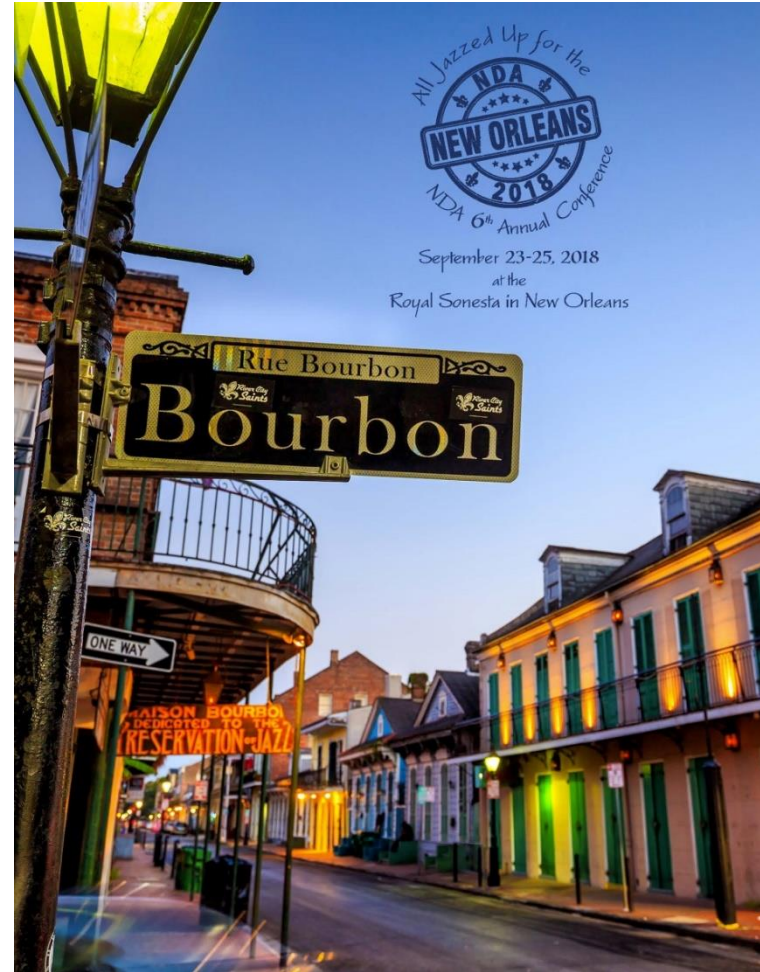




IP Support Staffing Trends Hiring and Retention Strategies

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Calendaring Our Future Together.™



IP Support Staff - Labor Market Trends



- Limited Labor Pool
- High Demand, Low Supply – price goes up!
 - High Reward
 - Low Control

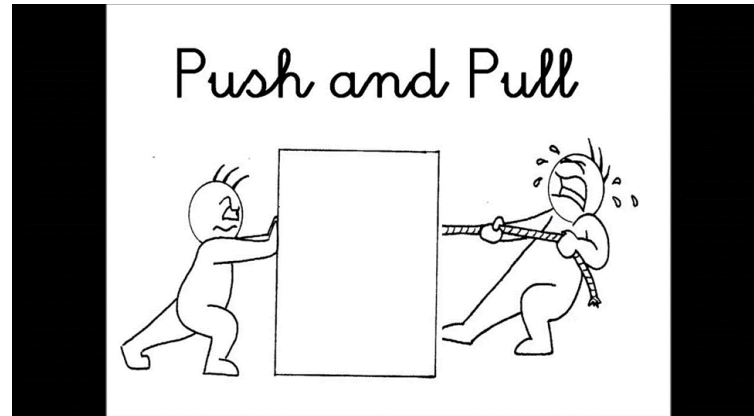


- Ask not what your IP support staff can do for you – ask what you can do for your IP support staff?
 - Cost of employee turnover

Evaluate “Push” and “Pull” Factors



- “**Push**” factors: what is driving them away from your Firm/Company

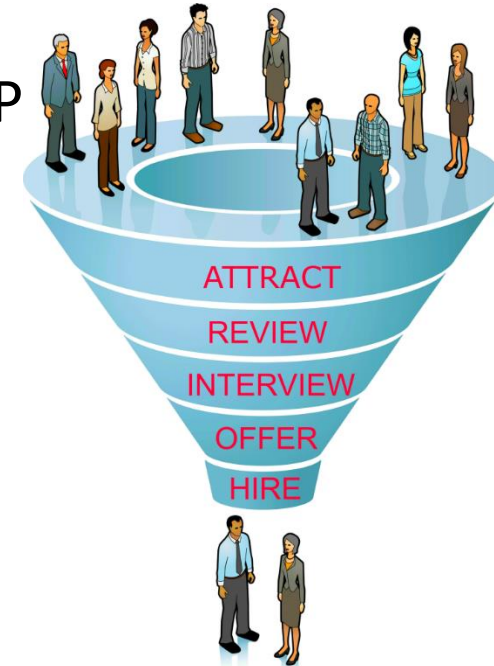


- “**Pull**” factors: what is the labor market offering that your Firm/Company is not

IP Administrator's Challenge



- **Reward** and **retain** top performers
- **Hire**, onboard and **train** new hires – IP and non-IP
- **Redeploy** staff – redefine roles
- **Succession planning** for key roles



Hiring Across Generations



- **Baby Boomers** (1946-1964) - practical experience, legacy knowledge, assessing transition to retirement, value practical knowledge, experience and financial security.
- **Generation X** (1965–1976) - learn by doing, problem solvers, self-reliant, have learned to adapt to extensive changes in technology and work processes, in prime of their professional lives (hone their leadership skills), value commitment, loyalty, balance and diversity.
- **Millennials or Generation Y** (1977– 1997) - highly educated, technology savvy, socially aware, achievement orientation, loyal, value flexible work schedules and variation in workload. Want “freelance, flexibility and full-time stability.” By 2025, millennials will make up 75% of workforce.
- **Generation Z** (after 1997) - the first “global” generation, surgically attached to their smartphone/devices, overrun with technology, process information faster, lower attention spans, better at multi-tasking, thinking and acting more entrepreneurially, have high expectations.



Leverage Across Generations



- **Generation X** have learned by doing, problem solvers – can teach process **efficiency** to the Millennials
- **Millennials** are
 - tech savvy
 - enjoy a challenge,
 - want to contribute
 - 75% of workforce by 2025
 - can help Generation X with **technology utilization**
- **Generation Z** can multi task and digest information quickly – can help Generation X and Millennials with **identifying key information**
- The power of **WIFM**



Hiring for Success



- Source Pools – referrals
- Job Descriptions
- Role of Testing
- Definition of Roles and Responsibilities
- Competency Models
- Performance Expectations
- Team Fit

Evaluating Candidates



- Resume review – consistency, loyalty
- What are the factor you consider when looking for a job?
- Tell me about the best manager you have worked with?
- What motivates you?
- Team dynamics – resolving conflict
- Work organization and time management skills
- Ask open ended questions

Performance Management



- Be fair and transparent, define expectations.
- Give supportive examples rather than broad statements – link cause and effect.
- Ongoing real time feedback.
- Performance concerns?
 - Where are they coming up short? – subject matter knowledge, interpersonal skills, package deal, not a compensation system, need balance.
 - How can they improve to meet expectations? – what do they need to do?
 - How will you measure sustained improvement? – how will they know their improvement will be measured – quantify with proof.

Retention What Motivates Staff to Stay?



- Do not assume, ASK THEM . . . I like working here because . . .
- Create a high-feedback environment
- My work experience would be better if HEAR THEM OUT!
- Retention Strategies
 - Onboarding, Training, Continued Growth Opportunities
 - Compensation
 - Recognition and Rewards
 - Work-life Balance
 - Open communications
 - Team Dynamics

Top Reasons Staff Leave



- Good people don't leave good organizations — they leave poor **Managers!**
- Better **Opportunity** – advancement, compensation, work life balance.
- **Boredom** – unchallenged, underutilized, meaningless work, job not what was expected.
- Autonomy – micromanaged – lack of decision making power.
- **Lack of Structure** – no procedures and practices – frustration.
- Corporate **Culture** – respect and acknowledgement for contribution – feeling undervalued.
- **Lifestyle** changes – relocation.

Succession Planning



- Evaluate existing staff – skill and will
- How are work processes and procedures going to change?
- What are the critical roles/functions?
 - Retirement?
 - Attrition/turnover?
 - Relocation?
- Bandwidth across the team – staff coverage sick/medical/leave.
- Redeployment and redefinition of roles

What Can IP Administrators Do NOW?



- Be honest with your staff acknowledge salary limitation
- Acknowledge their contribution to your team – engage them – what are they looking for?
- What are they interested in learning? – cross-training in Patent/Trademark, Foreign Filing? Docketing?
 - Consider transactional work – IP due diligence – perspective on the other side of the lifecycle
 - Chain of title research – ownership and assignment – gaps in title
 - PTAB case work
 - Peer training – subject matter experts – have seniors present topics
 - Lunch and Learn – subject matter training – knowledge development across the team
 - Global Dossier – how to review a patent family, common citation document

Diversified Learning Opportunities



- **Stretch** beyond limitations of role – learning within and across functional teams.
- **Encourage** them to learn different perspectives.
- Encourage them to **broaden their knowledge base** and discuss how to apply the new knowledge to their existing role.
- Create a **mutual learning collaborative work environment** – value knowledge and expertise.
- Teach them **strategies** on how to be more efficient and more effective – managing e-mails.
- Teach them how to **adapt/customize** focus on solutions.

Home Grown Talent!



- Train from within!
 - Pipeline approach to hiring.
- Hire Key Skills (smart, ATD, tech savvy, interpersonal skills, adaptable)
 - Teach subject matter knowledge
 - Manage risk
- Shadow train, then reinforce learning with oversight – real time questions answered.
 - **Documentation** – process steps, awareness of variation and complexity.
 - Have **senior staff mentor train** them – progressive responsibilities, low risk.
 - Requires **bandwidth** beyond coverage of day-to-day operations – training burden.
 - Requires **time and resource commitment** to a structured learning program.

Hiring Non-IP Staff



- Defined progressive learning plan
- Patent prosecution timelines – contextual learning
- Identify repetitive low risk tasks
- Progressively build knowledge – expand tasks
 - Reel/Frame, Execution Date, Entities, Assignee/Assignor
 - Ownership and assignment – chain of title – priority claim
 - External knowledge development resources – PCT WIPO, EPO-Online
 - Patent databases – WIPO, Espacenet, Global Dossier
 - Vendor based training
 - Technology training – patent systems, EFS-Web, e-PCT, PTAB

The Training Value Statement



The Balance



Train people well enough so they can leave;
Treat them well enough so they don't want to.

-Richard Branson

Thank you for your attention

Any Questions?