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Redesigning the Service Experience at the Polish Patent Office[1]

About the Office

The Polish Patent Office was established on December 28, 1918. The Patent Office performs its basic tasks in the area of granting legal protection of industrial property objects, collection and sharing of documentation and patent literature. The main objectives include[2]:

- receiving and checking declarations relating to inventions, utility models, industrial designs, trademarks, made in order to obtain protection;
- deciding on granting patents and supplementary protection rights for inventions, rights of protection for utility models and trademarks, as well as the rights of registration of industrial designs, geographical indications and topographies of integrated circuits;
- keeping the central collection of Polish and foreign patents.

The challenge

One of the main customers of the Patent Office are small and medium-sized enterprises (SMEs) in Poland that look for different types of legal

[1] Thanks to Marcin Gędłek, Deputy Director of the Department of Promotion and Support of Innovation at the Polish Patent Office, for providing information that led to the preparation of this case study.

[2] http://www.uprp.pl/zadania-uprp/Lead03,717,2840,1,index,pl,text/, accessed on 14/08/2014

protection. As a way of meeting their needs, specialists from the Patent Office decided to conduct a survey among them. This project, quite small at the beginning, grew considerably along the way:

"At the beginning it was just a thought of doing a survey among our customers. But then the project evolved and we decided to do something like a research of ourselves, so we decided to do some type of research to try and really think about this user experience: what is the customer that wants to use or benefit from the patent system experiencing? What are his expectations? And how does this reality correspond to these expectations? In other words: what are the elements that can be improved and changed at our office".

So in the end the aim of this project was to redesign new ways of customer service for the SME segment in the Patent Office, and to build guidelines for a new language of communication.

The project was implemented using a service design thinking method in an interdisciplinary team. The project was led by CODE – a design and innovation agency from Katowice. In the project team there were many specialists, including from GreenHat Innovations – a company that specializes in innovation, as well as diverse researchers specializing in different types of research.

The project was divided into two main phases: (1) extensive study – diagnosis of the current level of customer service in the Patent Office; and (2) redesign of the service.

Phase 1

The first stage was to build a common understanding about the project and to diagnose the situation within the Patent Office. The study was divided into two steps. The first step entailed a qualitative research of the Patent Office, and the second step involved a quantitative survey determining the situation of SMEs in the use of industrial property protection.

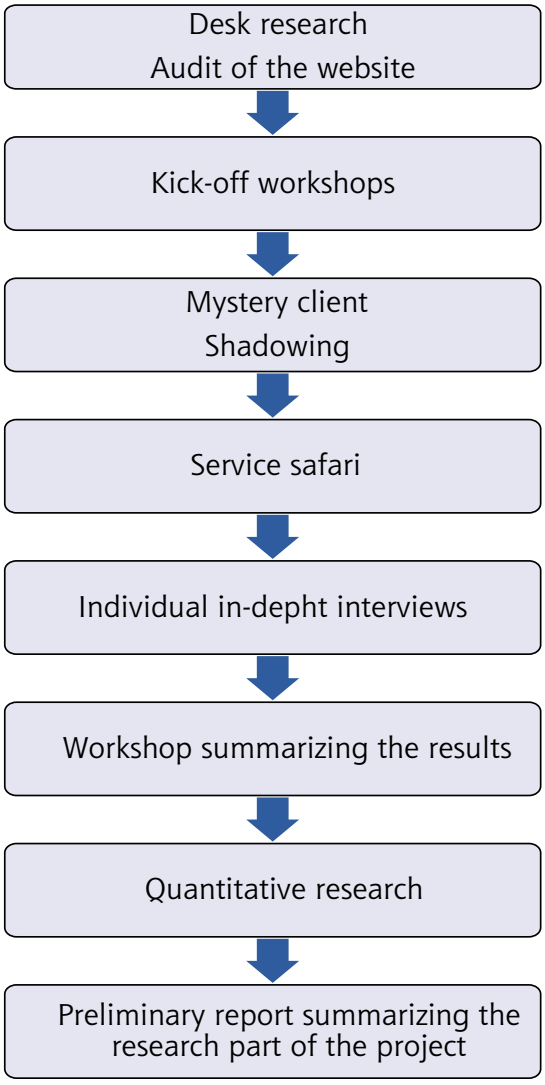
The team started with conducting an ethnographic research. The methods used at this stage were: mystery client, service safaris, shadowing and in-depth interviews with employees and customers.

The project started with the mystery client research. This is one of the best methods for testing the level of customer service, as it is not based on opinions on hypothetical situations, but on real customer experience at selected points of customer contact. "Mystery client"

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mostly consists in visiting the point of sale (in this case the Patent Office information desks) and describing the experience of the visit in a previously prepared questionnaire. The results were stimulating, as they presented the most critical and problematic areas of the customer contact points.

Figure 1. Overview of the first part of the project



Source: own elaboration based on information provided by the Patent Office.

Another method used by the researchers was the "Service Safari" study. This is a specific research method for understanding services. Researchers go on different locations to experience different services first hand in order to find out what different service experiences are like. Very often they may look at a wider range of services to get an idea about what makes a positive service experience, as it was in this case. The

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central aim is to gather information about a service in the real world and identify what makes for a good service experience across many different service types[3]. As one research team member reflected:

"Service safaris is a method inspired by all kinds of other services. You go to a good tailor, a good hotel, you observe how the service is built there. You look for inspiration and compare it with what you provide. You go to other places, to your competition, or even to different industries. This is one of the methods that can be very opening in the way of thinking".

The service safari conducted outside the Office was combined with "shadowing" – i.e. a very in-depth study of the services provided by the Patent Office. In this method the researchers carefully observed real-life situations for a set amount of time to understand how people behave within their normal context. This method can help to uncover the reality of what people actually do – as opposed to what they say they do. Shadowing an individual on a journey or activity can be used to identify opportunities for design and quickly understand a particular design context[4]. As one team member reflected: *"We did shadowing at the most important points of contact with our customers. This consisted mostly in observations of the actions that are taken by the employees and their relationships with customers: how they provide information, how our system of information works, how effective our force in the office is. And here we also found some weak points. One of these elements was that our general information is inefficient. (…) Shadowing gave us a lot of information on where our weaknesses are, where we should put emphasis for improving the quality of our service, what we have to do to build the right customer base, what type of CRM tool we need to have so that we have control over the flow of information between the customers and our employees, because at the moment we are stuck with the fact that we cannot identify these people, so we are not able to control the information flow".*

After that stage the quantitative researchers were invited to conduct a survey among a large group of SME representatives. That led to a better recognition of their needs and expectations.

After both parts of the research – qualitative and quantitative, all the results were gathered and summarized during the final workshop. That

[3] "Design methods for developing services", Design Council, source: https://www.innovateuk.org

[4] http://designingwithpeople.rca.ac.uk/methods/observation-shadowing

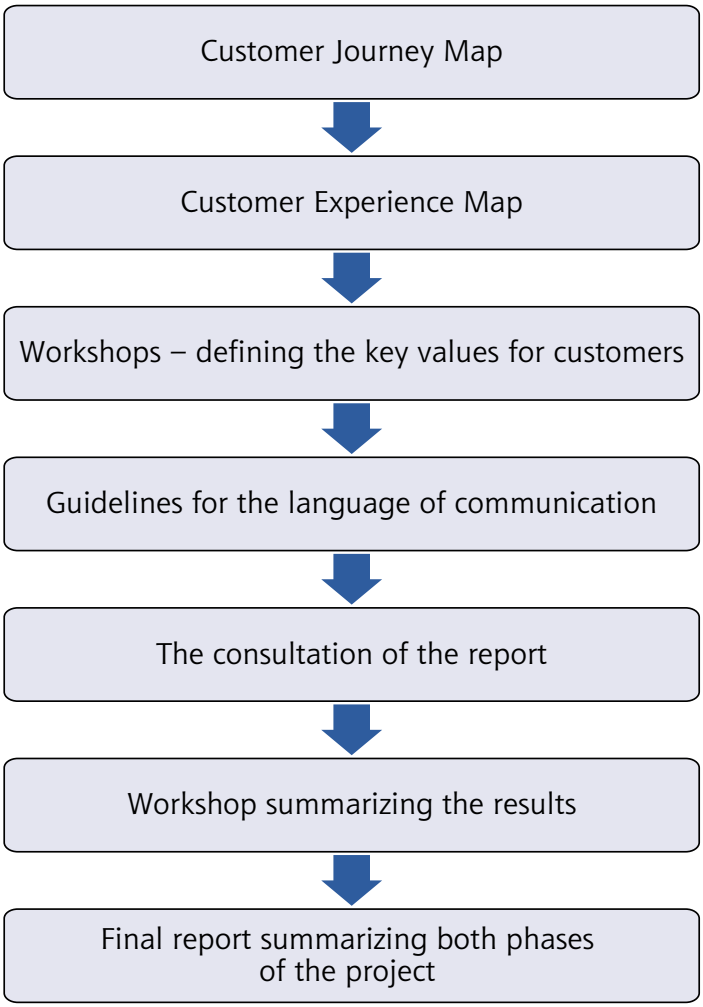
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started the second stage of the project – redesigning the service and looking for new ways of meeting customer expectations.

Phase II

In the second phase the team started with the development of a Customer Journey Map (reflecting the status quo of customer experience) and a Customer Experience Map (visualization of the user experiences at various points of contact associated with the services of the Office).

Figure 2. Overview of the second part of the project



Source: own elaboration based on information provided by the Patent Office.

A Customer Journey Map is a visual map or diagram, identifying the key stages, touchpoints and other components that make up a user's service experience. It may also have an additional layer of explanation that identifies problem areas or opportunities. This allows researchers

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and designers to see what parts of the service work for the user and what parts might need improving. The map helps to understand the user's progress through the service, beginning with when they first become aware of the service through to when they leave. Those tools take the user's point of view and explain their actual experience of the service[5]. The main objectives of the Customer Journey Map are:

- to identify the key elements of a service;
- to understand the links between all the different elements over time;
- to identify problem areas or areas where new things can be added;
- to create empathy with different types of users.

The Customer Journey Map was created based on the results of the research conducted in the previous part – shadowing, service safaris, interviews and a qualitative survey.

Figure 3. Stages of the Customer Journey Map

1. Search for information
2. Raising awareness
3. Preliminary research
4. Seeking a patent attorney
5. Personal contact with the Polish Patent Office
6. Filling in application
7. Consultation with the application
8. Submission + test application

Source: own elaboration based on information provided by the Patent Office.

One of the Patent Office employees reflected: *"At the very beginning as we started, someone asked the question 'At which point do we, as a Patent Office, place our interest in the customer?' Well, the answer was that, of course, at the time when the customer comes to us and submits the*

[5] "Design methods for developing services", Design Council, Source: https://www.innovateuk.org

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declaration – that for us was the date, the start of the application proceedings. But during those workshops it came to us that this moment, that we have identified as the first, turned out to be the eighth, the last!".

As the team prepared a detailed Customer Journey Map (the respective stages are presented in Figure 3) it turned out that the service should start many stages before the moment that the customer actually comes to the office.

The Customer Experience Map helped the team with the identification of points that have to be improved. A few examples of the difficulties encountered by customers during the different phases of the process before submitting the declaration are presented below:

- "Am I sure my idea / invention is to be covered by legal protection? I do not really know."
- "Can I handle this alone? It is more complicated than I thought."
- "This is all difficult and unreadable. The difficulty of the issues is strengthened by the difficult legal language, which is used by the Office".
- "How to select the right patent attorney? I do not know anything about them. I do not know how to verify them".

Table 1. The areas of opportunity to improve the services provided

Area of improvement	Recommendations
Assistance in understanding the process and the role of the different actors	· A simple visualization of the process of obtaining protection. · Definition of the possible paths to obtain protection (including informal) – introduction to color code paths to obtain protection, and the definition and benefits behind each of them. · Clear definition of the roles of the various actors in the process of obtaining legal protection (explaining the roles of the Patent Office, patent attorneys, courts and so on).
Personalized service (different for customers and patent attorneys)	· Rebuilding the information system at the entrance to the Patent Office building, with a separated area for customer service. · Space for meetings between experts and patent attorneys. · Info-center assistance (telephone, Internet, chat) geared to help you understand the process and support the user in choosing the appropriate path to obtain protection (communication with the use of customer benefits).
Assistance in getting to the right patent attorney	· Clearly define within the context of patent procedure when you may need the help of a patent attorney. · Posting a list of patent attorneys on the Internet, one of their specializations, graduates. · The ability to search for patent attorneys for a patent obtained.

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Personalization of information for different groups	· Distribution of the website and all the information on the different types of users, for example: 1. Beginner – seeking protection for the first time; 2. Advanced – seeking protection again; 3. Professional – patent attorney. · Adjust communication language to the level of knowledge of each of these groups (necessary use of language benefits).

Source: own elaboration based on information provided by the Patent Office.

The Customer Journey Map and Customer Experience Map helped the team to verify and understand the difficult moments for customers. After that the team started to work on defining a new proposition for customers and that led to the development of a new mission and vision for the whole Office:

"And then it led to the development of a new mission and vision for the whole Patent Office. It was also very significant because we asked the question: What is the mission? We got the answer that the mission of the Patent Office is to adjudicate about patent right! So we have changed the mission from this "adjudicate about patent right" to "help companies build a competitive advantage by providing legal protection". That is roughly the direction we went in".

During one of the last stages the team created a detailed proposition of the areas of opportunity to improve the provided services (some of which are presented in Table 1).

Results

The whole project ended with a comprehensive report with recommendations in the field of promotion, information and education along with elements of visual and graphic communication and a plan for the implementation of recommendations. The Patent Office already started the implementation process. The first phase is to create a professional service centre.

As one Patent Office specialist reflects*: "I must admit that for us it was obviously a very novel experience of looking at how we provided our services as a Patent Office before. This is a public administration and the major challenge is to adapt to thinking in terms of the real user experience and actually give our customers what they really expect and not what we* **think** *they expect".*

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Summary

This project shows that design tools and methods can be used not only in product design or business settings, but also in the service sector, even in the Public Administration. As one specialist reflects:

"This experience gave us a lot, not only in this particular project, but more in general, in the way how we think and start new ventures. Right now we think in terms of the service design really, we try to develop a user experience approach and we try to look at everything from a different angle, it is a change of perspective for us".

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