

Creating and managing a patent information group in a global environment

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Abstract

The article describes the key aspects of setting up and managing a global team of patent information scientists (GLIST) to work primarily with patent attorneys in a multinational pharmaceutical company. The main features identified for this team included:

- the flexibility to deal with searches efficiently, worldwide, within the team;
- close interaction between the information scientists and the attorneys, in partnership;
- managers of the team also carry out some searches themselves;
- sufficient language expertise within the team to carry out most translations in-house;
- good training and mentoring procedures, allied to a strong team ethic;
- a final product of each search which is a value-added search report, delivered in a timely manner, using a standardized GLIST-branded template.

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1. Setting the scene

Reorganizing, downsizing, restructuring or building teams in many companies is oft times seen as a daunting task. This kind of organizational shuffle is not unusual in the pharmaceutical industry. In 2000, Pfizer acquired Warner–Lambert, a pharmaceutical company with a dominant presence in the consumer health industry. Within a few years, the new Pfizer merged with another pharmaceutical company, Pharmacia.

The melding of the three companies presented its own challenges and opportunities with respect to the scientific and patent information service provided to the employees. Several articles have been published in this journal about

companies reinventing their information service to address changes, be it organizational or technological [1–3]. Pfizer was no different. After the merger in 2000, a global, multi-functional information management group of about 120 colleagues was formed within the Pfizer Global Research and Development (PGRD) Division. This department's functions included information technology, resource acquisition, library service, information retrieval, analysis, and dissemination. Research and Development scientists as well as patent attorneys composed the primary client base.

When the merger with Pharmacia occurred, a myriad of emotions was rampant throughout the organization and understandably so. The leader of the Information Management department found herself in the midst of the acquisition and all the changes that such an event engenders. As

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the maneuvering, strategic posturing and implementation began to manifest themselves, she was given a rare opportunity – a professional dream realized.

She was tasked with creating from scratch, a world-class organization where she as the creator and leader would have the jurisdiction to recruit according to tenets she identified as tantamount to the success of any high-performing team. In addition, she would have the full support of key stakeholders in upper management. The dream translated to the goal of building a team of patent information scientists who would work primarily in partnership with Pfizer's patent attorneys.

2. Charting our destiny

At the onset, the basic principles and *modus operandi* for the group were outlined.

We would function as a global team with members located at most of the Pfizer sites where patent attorneys reside. Our global approach would encompass our locations and the way we work. The team would be supervised by one director and three working managers who were information scientists themselves and would conduct searches in addition to their managerial responsibilities. Our interactions with clients would be based on partnerships, that is, we would work in tandem with them to protect and insure Pfizer's intellectual property. This new group would be an entity in the Legal division.

Major stakeholders were involved in the recruitment process. Some patent attorneys participated in the interviews, thus, giving them a voice to select the patent information scientists for their sites. Key to integrating new members into the team was our training and mentoring program. This was implemented to provide support to new members as they learn their roles. All external hires and internal candidates new to the information science career were given this opportunity. It was also a chance for our most experienced searchers to serve as mentors. During the mentorship, there were periodic evaluations of the program by the trainee, mentor and trainee's manager. Training was provided by database vendors and Pfizer colleagues.

After recruiting a few members to the new organization, we held our first face-to-face meeting. One of the key accomplishments of that meeting was drafting our mission statement.

Using Goldstein, Nolan and Pfeiffer's book, "Applied Strategic Planning," [4] we reviewed the definition of a mission statement – a brief, clear statement of the reasons for an organization's existence, its purpose, primary customer base, and the primary methods used to fulfill its purpose.

Next, we utilized the tool presented in the book for crafting a mission statement. Individuals identified our customers, the products and services these customers would require, how we would use technological means and different activities to provide the service, and the reasons for our existence in the Legal Division. Group discussion and con-

sensus-building followed. From that exercise, our mission statement was born. The vision, unlike the mission, was already established by our leader. Adopting key protocols and guidelines, fine-tuning our business model and naming the team were other accomplishments of the meeting.

3. A team emerges

Global Legal Information Science Team (GLIST) comprises 26 colleagues with advanced degrees in biology, business and chemistry or a related field. Collectively, we have a vast amount of experience in science and the pharmaceutical industry. A wealth of information science expertise and business management acumen are also represented.

Prior to the formation of GLIST, there were information scientists in other Pfizer divisions. As we charted our course, we wanted to ensure that we were cooperating with them to delineate our respective roles and prevent duplication of effort. Before our team was fully staffed, external search support was established as a means of managing workload and conducting searches outside of the group's expertise. In this regard, reputable external searching companies were identified to fulfill this service.

4. The business model

With GLIST members located at ten sites around the world, local patent information scientists work primarily with the patent attorneys at their site. However, in keeping with our global model, patent information scientists also perform searches for other attorneys irrespective of their location. This is the true essence of our global model. And, instrumental to its success, is our ability to communicate effectively with our clients and develop and maintain strong partnerships. Effective communication is vital!

The collaboration mentioned earlier between GLIST and other information scientists in Pfizer is also important. Our groups defined respective roles, responsibilities and boundaries. This foundation facilitates the transitioning of projects as they move from one information science group to the other. See Fig. 1.¹ GLIST primarily interacts with the attorneys while the scientists are the main clients for the research-based information scientists, as indicated by the solid arrows. The dotted lines also indicate interactions between groups albeit not as pronounced as the main ones.

The tangible product GLIST provides to clients is a value-added search report, delivered in a timely manner using a standardized, GLIST-branded, template. Reports are usually delivered electronically to our partners. However, the delivery formats may be customized to suit the partners' needs. To create this deliverable, a variety of searches is conducted using a wealth of resources. Another important dimension to the product is communication.

¹ As presented by the author at the IPI-ConfEx event in Athens, Greece, in March 2006.

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