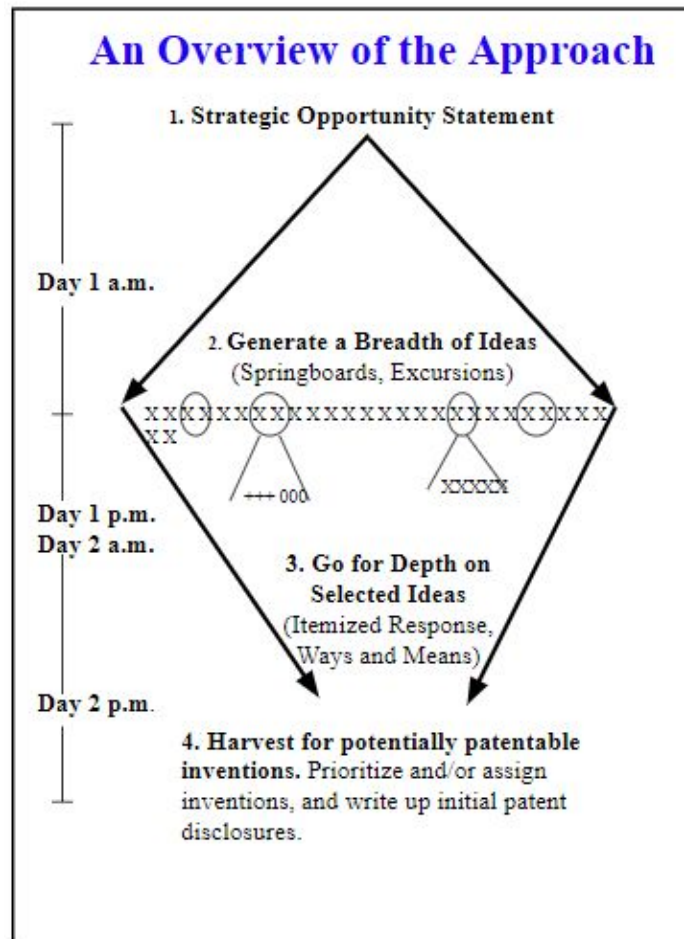


# *The Invention Cycle*

## *Invention Workshop*

### A BRIEFING DOCUMENT FOR CLIENTS



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# **The Invention Cycle: An Overview of the Approach**

**The Invention Cycle is comprised of three steps:**

Step 1—The Planning Meeting

Step 2—The Workshop

Step 3—Patent Application Preparation.

## **Step 1—The Planning Meeting and Selection of Expert Resources**

A planning meeting will be conducted between the facilitator, the “content client” and the “legal client.” The purpose of this planning meeting is to clarify the opportunity statement. This planning meeting also provides the basis for the selection of expert resources. Therefore, it is important that the planning meeting occur as early as possible so that the opportunity statement drives the selection of experts, rather than the other way around.

Experts for each workshop should be selected according to the specific area of opportunity. Each workshop should involve a diverse, relevant and balanced set of expertise including, but not limited to, experts from the business's core technical competencies. Diversity and relevance of expertise is dependent upon how we define the objectives (areas of opportunity) for each technical invention workshop. Steve Kuehl will facilitate and assist with this step.

## **Step 2—The Invention Workshop**

The invention workshop will ideally have a single focus so as to generate ideas and develop technical inventions with sufficient detail for protectability and to fully utilize the relevant and diverse expertise available.

Ideally the number of participants in each workshop should be kept to a maximum of six to seven people. More than seven tends to significantly erode the quality of creative thinking that can occur. If there are more participants that are appropriate for the workshop than six to seven, then we may want to consider a narrow scope for the opportunity statement. Each workshop will include a typist to assist the facilitators and designated patent attorney(s) in the management of the output of notes from the session.

The optimum length for workshops is typically two full days with a pre-meeting prior to the first day. Day 1 of the workshop is productive for initial creative opening up of the opportunity area and group formation. Day 2 of the workshop, particularly the morning, is typically the most productive for participants' creativity and more detailed invention. A significant portion of the afternoon of Day 2 is dedicated to selecting and clarifying potentially patentable ideas and identifying next steps for the disclosure preparation process. Steve Kuehl, will facilitate this step.

### Step 3—Patent Application Preparation

Each innovation workshop should produce several patentable ideas and/or areas. However, an explicit selection of specifically which ideas will be pursued should occur soon after Step 2 (within one to two weeks). This will be the responsibility of the legal client. The legal client will need the active assistance of the content client, and whomever the content client wishes to involve, in the final selection of ideas which are candidates for patent disclosure work. Steve Kuehl, GandL can assist the legal client with facilitation of this step.

### Essential Elements of Steps 1 and 2 of the Invention Cycle

There are four essential elements necessary for Steps 1 and 2 of the invention cycle to work well:

1. A well focused problem or opportunity statement;
2. The right mix of expertise;
1. An understanding of roles and responsibilities; and
4. Creative process techniques.

The purpose of Step 1 (the planning meeting) is to achieve the first and second of these essential elements. A well *focused problem or opportunity statement* can best be developed from a dialogue between the clients and the facilitator. The facilitator's objectivity can assist the clients in thinking through some of the subtleties of what might be accomplished in the workshop. The opportunity statement is also critical for *selecting the right people* to participate in the meeting.

The ideal number of people for a workshop is six to seven experts, including the content client. A guideline for creating the optimum mix of expertise requires balancing several considerations including diverse expertise, relevant expertise, customer/market understanding, and “naive” expertise. We also recommend considering outside experts, whether from outside the company or the division. While this makes recruiting slightly more difficult, the diversity of perspectives that results greatly enhances the quality of new and creative thinking in the workshop.

The third essential element—understanding the roles and responsibilities—is important for every participant, especially the person in the client role. There are four roles in a workshop: *content client, legal client, meeting facilitators and expert resources*. The content client directs the session. The content client's responsibility is to articulate the technical challenge and select technical resources. The legal client's responsibility is to manage the next steps for preparation of disclosures and to ensure that technical resources get individual assignments. The facilitators guide the session in the direction set (and reset) by the client. Expert resources (those who have been specifically selected) contribute ideas, suggestions, concerns and perspectives. Success of the session depends, in large measure, upon all four roles being played well.

The fourth essential element—*creative process techniques*—is more art than science. For the purposes of this briefing, three of the creative techniques we will use are worth noting: Springboards, the Excursion and the Itemized Response.

- Springboards are idea statements that begin with the words "I wish" or "How to." Wishing helps protect new ideas from being rejected or evaluated, and also helps participants "stay loose" and approximate in their thinking.
- The Excursion is a creative technique used for generating new and fresh thinking—and energy—as and when it is needed.
- The Itemized Response is a way for conducting an open-minded evaluation of a selected idea. This technique also helps to promote further thinking and refinement of ideas.

Given the need to stay flexible and responsive to the needs of the client and the demands of the particular problem or opportunity, the process will likely vary from session to session.

<p><b><u>Prior to Invention Workshop</u></b> (3-5 weeks)</p> <ol style="list-style-type: none"> <li>1. identify the opportunity area</li> <li>2. select and recruit participants</li> <li>3. Set workshop date &amp; location</li> </ol>	<p><b><u>Day 1 of Workshop AM</u></b></p> <p>Generate Springboards (Breadth)</p>	<p><b><u>Day 2 of Workshop AM</u></b></p> <p>Generate and Develop Ideas (Depth)</p>
<p><b><u>Afternoon before Workshop</u></b> (2-3 hours before end of day)</p> <ul style="list-style-type: none"> <li>● “Scope” and clarify the Opportunity Statement</li> <li>● Current Model</li> <li>● Future Assumptions</li> </ul> <p>[facilitator(s), client, inventors, sponsor]</p>	<p><b><u>Day 1 of Workshop PM</u></b></p> <p>Generate and Develop Ideas (Depth)</p>	<p><b><u>Day 2 of Workshop PM</u></b></p> <p>Harvest Session Notes for Invention “Acorns”</p> <p>Write up “Initial” Invention Disclosure Statements</p>

# An Overview of the Approach

