

**Notes from Breakout Groups**



**LESI Winter Planning Meeting 2021 - Day 1 - Date: Feb 3, 2021**

Meeting Recording:

<https://lesi->

[org.zoom.us/rec/share/UI6avEO7wNFbR4Z4bypt1V5nXe1BKck7kuwjgWQFeupORtdn9KB8RHjazlqM7za](https://org.zoom.us/rec/share/UI6avEO7wNFbR4Z4bypt1V5nXe1BKck7kuwjgWQFeupORtdn9KB8RHjazlqM7za)

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Access Passcode: LESIWPM1!

**1**

**(10 minutes) TOPIC #1: Educational Programing - Overview** (education priorities for members and national societies, are they different in different national societies, what has worked and what is needed)  
*Topic Leaders: Sonja London (LES Scandinavia) / Madelein Kleyn (LES South Africa)*

**(20 minutes) Breakout Discussions -- Group Leaders:**

Breakout 1	Breakout 2	Breakout 3	Breakout 4	Breakout 5
Sonja London	Madelein Kleyn	Karin Hofmann (LES Austria)	Natalie Raffoul (LES USA-Canada)	Martin Schneider (LES Switzerland)

**(20 minutes) TOPIC #1 "Report-out" by Group Leaders** (highlighting top three comments)

Group Leader	Focused Question
Room 1 – Sonja London	What in LESI educational activities is working and why? What does not work and why?
Room 2 – Madelein Kleyn	What education tools our members need? What are members' priorities?
Room 3 – Karin Hoffman	What education tools our national societies need? What are the national societies' priorities?
Room 4 – Natalie Raffoul	What educational tools should LESI develop or help national societies to develop?
Room 5 – Martin Schneider	What is the LESI value proposition in education to retain and attract members? How should we communicate that value proposition?

## Notes from Breakout Groups



### Group 1 (Sonja) -- What in LESI educational activities is working and why? What does not work and why?

#### What Works?

- Digital leap during pandemic
- Webinar available to all members across the world
- A lot of material available
- Ready made courses (LES South Africa) running well, under license from LES USA (f2f and virtual)
- YMC networking activities and quiz
- Course materials available are very good – especially beginners course (good value)



#### What does not work?

- National societies are not aware of available educational materials (and how to access)
- Information missing about the material available
- Most societies do not have a lot of content on the website.
- Majority of webinar are for free for all (not for members only). This varies by national society, e.g. YMC and LES Scandinavia are for members.
- Can society use some materials only under (paid) license? How to be able to offer this to members? How members can participate to courses?
- Its easy to kick off trainings but not so easy to follow up. Some courses were not transformed to virtual. Follow is important to be arranged.

#### Other remarks

- Audience vary (skilled/less skilled) and content may need to address this. (Beginners course developed by LES Russia to tackle this)
- All content is by national societies -> should LESI provide something for all? Could collect materials to be shared with all national societies
- Need to have new kind of learning activities
- How to enable national societies to connect and share their materials to each other?

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### Group 2 (Madelein) - What education tools our members need?

#### What are members' priorities?

Audit member society material and refreshing these: Members don't necessarily know what is available

- Access to what is available in national societies
- National languages – training material of national societies may not be in English
- Centralise resource
- Rewards – royalty -?? The national societies making available to LESI.



## Notes from Breakout Groups



- Ask members what their priorities and needs are: Questionnaire ?
- Database – searchable – materials available – expert consultants to assist with database set up and materials clean up

### Training on demand

- Part time – time commitment to LESI training courses
- Webinar/pre-recordings of training material – shorter than life face to face events (pre-recording of presentations – separate engagement sessions with trainers)

### Young researchers training (EPO and USPTO materials) – non –LESI materials

### Scope of training

- Curriculum based courses
- On job training – new professionals
- Upgrade professional knowledge in specific areas
- Knowledgeable trainers
- Different course modules – basic courses (free for members) & premium courses on specialist courses

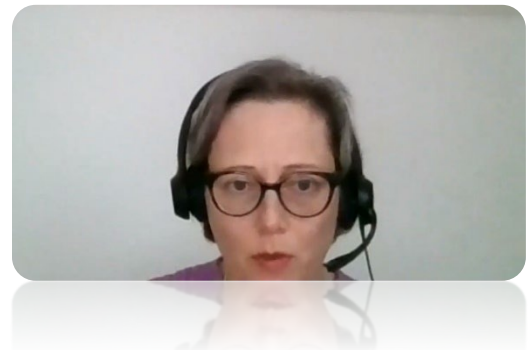
### Certification requirements – Certification Groups collaboration – digital format certification – CPL

- E-certificates
- Completion of course Q&A for certification

### **Group 3 (Karin Hofmann) - Needs and priorities of national societies**

#### **(1) Credits and Certifications**

- Consistent credit system
- Multiple credits
- Cross border
- Additional attendance certificates
- also important for Tech Transfer at Universities



#### **(2) Value of international organisation**

- Access to international speakers
- Identify topics where international view is an asset
- Using digital platforms
- Take into account that use differs countrywise (e.g. Brazil: Instagram is used widely, LES has own account and delivers Webinars via Instagram)
- Benefit of accessing/offering webinars of other societies to own members

## Notes from Breakout Groups



### (3) Access to existing programs

- National societies not always aware of LESI courses
- Then they could better use, market and promote them
- Value of recorded presentations
- Directory what is available, updated versions of existing courses
- Record existing courses on video
- Classify it, what does the course address, searchable, also skill levels
- How to contribute a course to the international offerings, how to distribute one
- Combine recordings with live complement
- Importance of online-train-the trainer courses
- Specific contact points for each course
- One person as promotor of the courses at each national society

### Room 4 – Natalie Raffoul -- What educational tools should LESI develop or help national societies to develop?

- In person needs to evolve but virtual will continue; must be a consideration in long term planning
- How do you make a hybrid event enticing for in person while also attracting an online audience
- "No deal without a meal"
- In persona facilitators
- Language is an issue; translation or captions needed
- Consider needs of younger chapters – basic training; courses to train the trainer
- Omni-Channel Engagement



### Room 5 – Martin Schneider -- What is the LESI value proposition in education to retain and attract members? How should we communicate that value proposition?

- Better communicate our value proposition and customize that message to various audiences and to highlight the international aspects and resources of the organization
- What we can do more? Develop more certification and credit systems
- Showcase deals that LES members have been active in; make those deals more visible
- Data privacy should also be explored further as an issue adjacent to IP concerns



## Notes from Breakout Groups

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**(10 minutes) TOPIC #2: Doing Deals More Efficiently in the Virtual Environment: COVID's Impact on the Deal Creation – Overview** (lessons learned during the pandemic about using virtual technology to do deals better and quicker, how do we convey best practices to members)  
*Topic Leaders: Mike Lasinski (LES USA-Canada) / Pam Cox (LES USA-Canada)*

**(20 minutes) Breakout Discussions -- Group Leaders:**

Breakout 1	Breakout 2	Breakout 3	Breakout 4	Breakout 5
Mike Lasinski	Pam Cox	Andre Gorius (LES France)	Hayley French (LES Britain & Ireland)	Patricia Bunye (LES Philippines)

**(20 minutes) TOPIC #2 "Report-out" by Group Leaders** (highlighting top three comments)

### Group 1 – Mike Lasinski

*Bottom line: group thought it was an important issue to explore and good to have a working group.*

- (1) Best practices around when you need to be in person vs virtual (trust issues)
- (2) Training around professionalism around virtual communications (focus issues, preparation for negotiations)
- (3) How to best use the technology (ex. when it is appropriate to use breakout sessions? Are connections secure?)



### Group 2 - Pam Cox

- Best practices - Handling transactions and space around the negotiations
- Ettiquette
- Expectations (24 hour availability)
- How to manage hybrid negotiations – both in person and virtual
- What tools/materials would be helpful to develop (ex. Some countries have very formal requirements) – creation of a tip sheet?



### Group 3 (Andre Gorius)–

**Bottom line:** Trust tools, guidelines and best practices

- In M&A negotiations, virtual has been going on for a longer time and there are best practices to be gleaned from this.
- How do you choose virtual/in person (goes back to trust)
- Tools – protection of data – personal, transactions – which tools to use when (could we create LES guidelines here?)

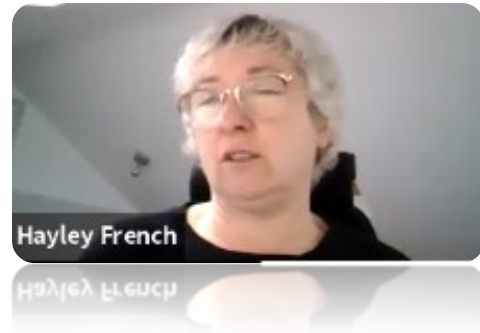


## Notes from Breakout Groups



### Group 4 (Hayley French)–

- Human factor in deal making
- Best practices/training internationally would be helpful (where is it better to use the telephone vs. video)
- What technology works better where, what country? International comparisons are helpful
- Virtual deal-making (fundamentals here needed)



### Group 5 (Patricia Buyme)

- Trust is a main theme – difficult to have discussions/establish a relationship over zoom
- LESI could be used as a manor as establishing trust network to “vet” parties
- Standardized forms and guidelines
- Challenge of confidentiality and attorney-client privilege



**Volunteers for the task force:** Brian O'Shaughnessy, Lionel Tan, Hector Chagoya, Olli Pekonen, Madelein Kleyn.





**LESI Winter Planning Meeting 2021 - Day 2 -- Date: Feb 4, 2021**  
 Meeting Recording:  
<https://lesi-org.zoom.us/rec/share/gq-d7AU2U3eiy6yZrPWjwRVA6PrbQLdh8CHqT1JceeJL4g9uNBWgoz6I-iqNhQ.-YRTKaMGTFWzCs-0>  
 Access Passcode: LESIWPM2!

3

**(10 minutes) TOPIC #3: Building Community – Overview** (how to build personal and professional relationships, how to build engagement with members and potential members, what communities are priorities, how to build membership)  
*Topic Leaders: Tatiana Campello (LES Brazil) / Jim Sobieraj (LES USA-Canada)*

**(20 minutes) Breakout Discussions -- Group Leaders:**

Breakout 1	Breakout 2	Breakout 3	Breakout 4	Breakout 5
Tatiana Campello	Jim Sobieraj	Gina Busku (LES Hungary)	Lionel Tan (LES Singapore)	Francois Painchaud (LES USA-Canada)

**(20 minutes) TOPIC #3 “Report-out” by Group Leaders** (highlighting top three comments)

(Session started at ~ :40 minutes)

- Topics:** What does Building Community mean?  
 What kind of communities?  
 How to connect and create community - facilitate shared interests  
 How to work with the national societies in creating community?

**Breakout 1 - Tatiana Campello (LES Brazil)**

- Different societies (depending on size) have different needs
- YMC activities are a good model to build on
- COVID has an impact – meetings will look different; we need to find ways to bring more ways to provide information to members (both professional, social, inspiring, sharing common interests, etc)

**Breakout 2 – Jim Sobieraj (LES USA-Canada)**

- Focused on Building communities across societies – to share experiences, best practices
- When we return to meetings, we should strive to showcase a diversity of speakers to ensure that we reflect the geographic reach of the organizations
- LESI can help by facilitating a more visible and accessible a master calendar of events
- In person meetings in the future should include a virtual options (perhaps at a reduced fee?)
- Including translation or closed captioning in programing would also facilitate more participation (and high-quality engagement)

**Breakout 3 - Gina Busku (LES Hungary)**

- International aspects of the organization is extremely valuable to LES members
- National societies could involve their members more in LESI activities to increase value of being a members of the local organization (access to this international network)

## Notes from Breakout Groups



- Language can be a barrier, so as above, efforts to overcome language gaps should be a focus
- Give the many committees, some introduction/overview for new members would be helpful (ex. YMC kick off meeting to orient members)
- An integrated master calendar (or information available in an App?) would be helpful to better link societies (in addition to an email)
- LESI should consider organizational members in addition to individual members

### Breakout 4 - Lionel Tan (LES Singapore)

1. Create Standards Qualifications for Licensing Executives, to showcase high quality; have Industry Advisory Boards
2. Have Industry “Champions” (ex. John Carney for the Auto industry) to create unique groups/communities, become thought leaders, explore disruptive trends / topics (eg. 5G in cars)
3. Have a pre-YMC community – reach out to university students to expose them to LESI, so they can be welcome to LES community when they join the workforce – but need to differentiate from AUTM, different value proposition of LESI
4. Some national societies reluctant to share – need to reach out to find out why and create incentives for them to share to build a stronger LESI community
5. **Have a “Ask Me Anything” (AMA) platform – various LES members/experts in specific industry / regions could volunteer once a week / month for such a session. People could join and ask them any questions to tap on their expertise and experience. Sarita from Apple mentioned she would pay to join such a session and be able to ask such questions. Could be a new revenue stream for LESI. (Dallas/Christopher to flesh this idea out)**

### Breakout 5 - Francois Painchaud (LES USA-Canada)

- Identify the challenges of new way of doing things post-COVID
- LESI needs to better identify itself as a Network of Societies
- We should consider how to implement organizational members to enhance/increase industry involvement
- Support / better Facilitate small communities, such as YMC; should cut across societies/break down the national society boundaries for these types of groups





**4**

**(10 minutes) TOPIC #4: LESI identity and differentiation - Overview** (how should we provide value to members and national societies, what should our priorities be, how should we be seen by members, the profession and the public, how do we distinguish ourselves from other IP orgs)  
*Topic Leaders: Jim Malackowski (LES USA-Canada) / Jose-Miguel Lissen (Spain & Portugal)*

**(20 minutes) Breakout Discussions -- Group Leaders:**

Breakout 1	Breakout 2	Breakout 3	Breakout 4	Breakout 5
Jim Malackowski	Jose-Miguel Lissen	Vincent Bergeron (LES USA-Canada)	Eszter Szakács (LES Hungary)	Fiona Nicolson (LES Britain & Ireland)

**(20 minutes) TOPIC #4 "Report-out" by Group Leaders** (highlighting top three comments)

(Session started at ~ 1:24 minutes)

**Proposed strawman statement:**

*Through networking and professional education, the Licensing Executives Society International uniquely Advances the Business of Intellectual Property Globally as a result of its (i) focus on technology commercialization, (ii) network of national societies, and (iii) diversity of individual members representing legal, corporate, university, valuation, and IP creator professionals, among others.*

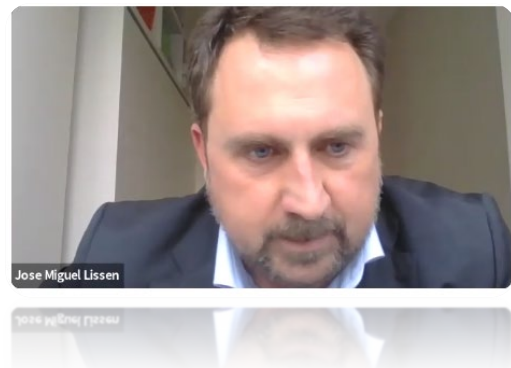
**Breakout 1 - Jim Malackowski (LES USA-Canada)**

- Having a statement of identity is helpful to explain who we are; a needed communication tool
- Amendments: we should talk about other IP rights, including trademarks
- LESI is a Network of Networks
- Global/Local nexus is critical to who we are
- Promoting LESI as an entity itself – not just the individual societies
- Identify the top 10 entities that are not active in the local societies and target those organizations each year to make sure we are inclusive of those leaders



**Breakout 2 - Jose-Miguel Lissen (LES Spain & Portugal)**

- The strawman is good but should be expanded to include other areas of IP/trademarks & fashion and designs. Also, should be broader than just licensing (too limiting) – also securing IP, building IP, litigation management of, prosecution, and other aspects
- LESI different because it includes all the professionals involved in commercialization process (*this includes all COVID pandemic players from vaccine development to delivery*)



## Notes from Breakout Groups



- WIPO DG Daren Tang has focused WIPO on commercialization and the venture funding aspects of IP development; has discussed with Heinz Godar that LESI would be a good partner (*Note that LESI has already been working on an update of its MOU with WIPO focused on the same and plan to sign this agreement in April 2021*)
- Should set up groups to provide advice, including helping identify the right questions to ask to address their needs (Tatiana)
- LESI should also target CTOs to get them more involved in LES Advisory Boards

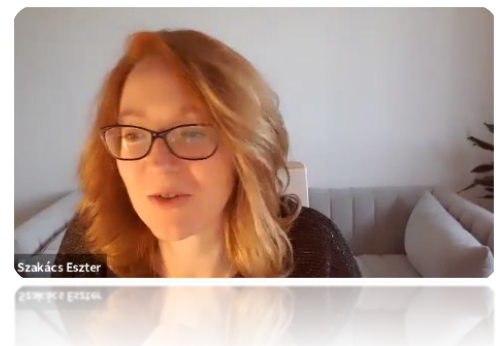
### Breakout 3 - Vincent Bergeron (LES USA-Canada)

- The word “licensing” differentiates LESI from other organizations (vs IP organizations); noted that the LESI Communications Committee is doing a mapping exercise to highlight how we differ
- LESI is different because you get to leverage both local and international aspects as a member (the “global” aspects of LESI is the reason that many people stay involved).
- Likewise, LESI is different because of our interactions with corporations – (“we have our feet inside industry and understand more of what industry needs.”) – should strive to continue to maintain this character.
- LESI is helpful to provide resources, information that can help create deals, know the agreements side of IP, etc. – thus, the word “licensing” also a key differentiator (Quote: “*We are a beacon of professionals who know the ins and outs of licensing*”)
- Culture of acceptance and helping each other within LESI is also very unique, and likewise this should be used to leverage membership; this includes targeting and pulling in more industry
- Perhaps host Regional coffees around the world?



### Breakout 4 - Eszter Szakács (LES Hungary)

- Basis of LESI is professional network, information source
- Network and knowledge source for making better deals
- Duality of **International reach + unique country view** – *add this to the strawman sentence*
- **Crossing all kinds of borders – geographical, professional, industry, size of companies – at the same time** (Laura)
  - Another boarder – having different size of companies discussing is not typical to gather under the umbrella of one organization
- **“We can license anything anywhere” – slogan, regional help (sharing of knowledge and network as well)**
- **Should not exclude the non-technology aspect** – perhaps adopt “intellectual capital” – something to express a holistic approach
- Still missing from the strawman: LESI delivers numbers, real data – used in negotiation, in court - **LESI is a trusted source** in every industry and every aspect (we need to communicate that)



## Notes from Breakout Groups



- **Once we identify the crucial points** – *clear communication of them is then important*
- Diversity across industries, pharma learning from IT – worth capturing, learn from each other
- Diversity – national and international -- concentrate more on numbers, surveys per industry
- **Word technology mentioned: do we focus only on technology commercialization, product licensing should also be included**
- Sharing knowledge – sharing contact – would be useful to share network, e-g- contacting subsidiaries, take advantage of the big family on the international level
- IP transaction to add to technology commercialization

### Breakout 5 - Fiona Nicolson (LES Britain & Ireland)

- Technology commercialization is too narrow -- Intellectual property or intellectual capital is preferred to capture the breath of this
- LESI is an **umbrella organization, but its local nature is important**
- Individuals coming together – a “symphony” of professionals gathering
- Important that LESI NOT be a “secret society” – need greater visibility; better communication to allow members in each society to be connected and get information
- Must better communicate to other professionals around the world – namely bring the information to them
- Finally, don’t forget that LESI **trainings sessions** for different professionals at different levels is still important and needed



**Appendix****Participants During Day One of the Meeting (106)**

Name	LES Society
Achim Krebs	Benelux
Aimin Huo	China
Alexander Haertel	Germany
Alexey Vakhnin	Russia
Andre Gorius	France
ARNAUD MICHEL	France
Audrey Yap	Singapore
Barbara Berdou	South Africa
Bayani Loste	Philippines
Bienvenido Marquez	Philippines
BLUM Véronique	France
Bob Held	USA-Canada
Brian O'Shaughnessy	USA-Canada
Bruna Lins	Brazil
Cairan He	Singapore
Chalermpol Tuchinda	Thailand
Charlotta Ljungdahl	France
Christopher Shaowei	China
Claudio Ulloa (MEX) (Claudio Ulloa)	Mexico
Dallas Wilkinson	Australia-New Zealand
Dana Colarulli	LESI
Danie Dohmen	South Africa
David Massey	LESI
David Swain	China-Hong Kong
DINI Roberto	Italy
Don Drinkwater	USA-Canada
Duncan Ferguson	Australia-New Zealand
Esha Cruickshank	LESI
Fernández-lasquetty Javier	Spain-Portugal
Fernando Da Cruz Vasconcellos	Britain-Ireland
Fiona Nicolson	Britain-Ireland
Francisco Velasco	Spain-Portugal
Gary Fedorochko	USA-Canada
Gary Ma	Chinese Taipei
Georgina Busku Wachtler	Hungary
Gillian Fenton	USA-Canada
Gómez Jon Ander	Spain-Portugal
Guido Quiram	Germany

## Appendix

Guillermo Criado Martin	Spain-Portugal
Hananel Kvatinsky	Israel
Hayley French	Britain-Ireland
HECTOR CHAGOYA	Mexico
Hilton Sue	USA-Canada
Hiroki Saito	Japan
Ichiro Nakatomi (中富一郎)	Japan
İdal Murat	Turkey
JAMES HOU	Chinese Taipei
James Malackowski	USA-Canada
Jean-Christophe Troussel	Benelux
Jean-Hyacinthe de Mitry	France
Jeffrey Whittle	USA-Canada
Jennifer McNally	LESI
Joe Zanoni	LESI
Johan Prreez	South Africa
John Carney	USA-Canada
John Paul	USA-Canada
Jose Miguel Lissen	Spain-Portugal
Junko Sugimura	Japan
Karin Hofmann	Australia-New Zealand
Keith Lutsch	USA-Canada
Laura MacDonald	Benelux
Lionel Tan	Singapore
Madelein Kleyn	South Africa
Mark Pullen	Australia-New Zealand
Mark Wilson	Britain-Ireland
Martin Schneider	Switzerland
Matteo Sabattini	USA-Canada
Mattia Dalla Costa	Italy
Michael Lasinski	USA-Canada
Natalie Raffoul	USA-Canada
Ningling Wang	China
Olli Pekonen	Scandinavia
Omer Hiziroglu	Turkey
Orakanoke Phanraksa	Thailand
Pam Cox	USA-Canada
Pat O'Reilley	USA-Canada
Patricia Bunye	Philippines
Patrick Cantrill	Britain-Ireland
Paula Mena Barreto	Brazil
Petra de Brantes	Czech Republic-Slovakia



## ***Appendix***

Rainer Herzig	Austria
Reena Mitra-Ventanilla	Philippines
Rinaldo Plebani	Italy
Rosita Li	China-Hong Kong
Russell Levine	USA-Canada
Scott Williams	USA-Canada
Sergey Dorofeev	Russia
Sherry Rollo	USA-Canada
Shiva Loccisano	Italy
Sian Godwin	LESI
Sonja London	Scandinavia
Szakács Eszter	Hungary
Tanja Sovic	Austria
Tatiana Campello	Brazil
Thierry Sueur	France
Thomas Adocker	Austria
Thomas Bereuter	Austria
Vikran Duangmanee	Thailand
Vincent Bergeron	USA-Canada
Yorck Hernandez	Germany
Yorikatsu HOHOKABE	Japan
Yu Sarn Chiew	Singapore
Zhongqi Zhou	China



## Appendix

### Participants During Day Two of the Meeting (91)

Name	LES Society
Achim Krebs	Benelux
Aimin Huo	China
Alexander Haertel	Germany
Alexey Vakhnin	Russia
Andre Gorius	France
ARNAUD MICHEL	France
Audrey Yap	Singapore
Barbara Berdou	South Africa
Bayani Loste	Philippines
Bienvenido Marquez	Philippines
BLUM Véronique	France
Bob Held	USA-Canada
Brian O'Shaughnessy	USA-Canada
Bruna Lins	Brazil
Cairan He	Singapore
Chalermpol Tuchinda	Thailand
Charlotta Ljungdahl	France
Christopher Shaowei	China
Dalit Sagiv	Israel
Dallas Wilkinson	Australia-New Zealand
Dana Colarulli	LESI
David Massey	LESI
David Swain	China-Hong Kong
DINI Roberto	Italy
Esha Cruickshank	LESI
Fernández-lasquetty Javier	Spain-Portugal
Fernando Da Cruz Vasconcellos	Britain-Ireland
Fiona Nicolson	Britain-Ireland
Francisco Velasco	Spain-Portugal
Francois Painchaud	USA-Canada
Gary Fedorochko	USA-Canada
Gary Ma	Chinese Taipei
Georgina Busku Wachtler	Hungary
Gillian Fenton	USA-Canada
GJ - Juergen Graner (Juergen Graner)	Austria
Hananel Kvatinsky	Israel
HECTOR CHAGOYA	Mexico
Heinz Prof. Dr. Goddar	Germany

**Appendix**



Hilton Sue	USA-Canada
Hiroki Saito	Japan
Ia Modin	Scandinavia
Ichiro Nakatomi (中富一郎)	Japan
İdal Murat	Turkey
JAMES HOU	Chinese Taipei
James Malackowski	USA-Canada
James Sobieraj	USA-Canada
Jean-Christophe Troussel	Benelux
Jean-Hyacinthe de Mitry	France
Jeffrey Whittle	USA-Canada
Jennifer McNally	LESI
Joe Zanoni	LESI
Johan Prreez	South Africa
John Paul	USA-Canada
Jon Ander Gomez	Spain-Portugal
Junko Sugimura	Japan
Keith Lutsch	USA-Canada
Laura Macdonald	Benelux
Lionel Tan	Singapore
Madelein Kleyn	South Africa
Majd Khaddash	Arab Countries
Mark Wilson	Britain-Ireland
Matteo Sabattini	USA-Canada
Michael Lasinski	USA-Canada
Müller-Stoy Tilman	Germany
MUSTAFA CAKIR	Turkey
Ningling Wang	China
Olli Pekonen	Scandinavia
Omer Hiziroglu	Turkey
Pam Cox	USA-Canada
Patrick Cantrill	Britain-Ireland
Paula Mena Barreto	Brazil
Rainer Herzig	Austria
Reena Mitra-Ventanilla	Philippines
Richa PANDEY	India
Rosita Li	China-Hong Kong
Sarita Venkat	LESI
Sian Godwin	LESI
Sonja London	Scandinavia
Szakács Eszter	Hungary

**Appendix**



Tanja Sovic	Austria
Thierry Sueur	France
Thomas Bereuter	Austria
Udo Meyer	Germany
Victor Yang	LESI
Vikran Duangmanee	Thailand
Vincent Bergeron	USA-Canada
Yorck Hernandez	Germany
Yorikatsu HOHOKABE	Japan
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