

# BPIP PATENT SEARCH TOOLS

Trials and tribulations of evaluating

Rachel Walkley – Patent Intelligence Analyst  
Global Patent Department  
Reckitt



I've worked as an information scientist since early 1990s, started with Shell Research, then Unilever Research here in Port Sunlight, before joining Reckitt Legal in 2020 during the lockdown.

I am one of a team of four patent searchers who participated in the trial. We also have responsibility for delivering enterprise wide patent search tools, especially for attorneys and R&D.

# OUR PURPOSE

We exist to protect, heal and nurture in the pursuit of a cleaner and healthier world.



Reckitt is a consumer goods and healthcare company, operating in four key areas: Germ Protection, Self-Care, Household care and Intimate wellness. Our markets covers Americas, Europe and Emerging markets, including China and India. Picture illustrates our power brands that form the backbone of our company's global portfolio

## What is this presentation about?

**IT ISN'T ABOUT WHAT WE  
CHOSE OR OUR REASONS WHY.  
IT'S ABOUT THE LESSONS WE  
LEARNT ALONG THE WAY!**

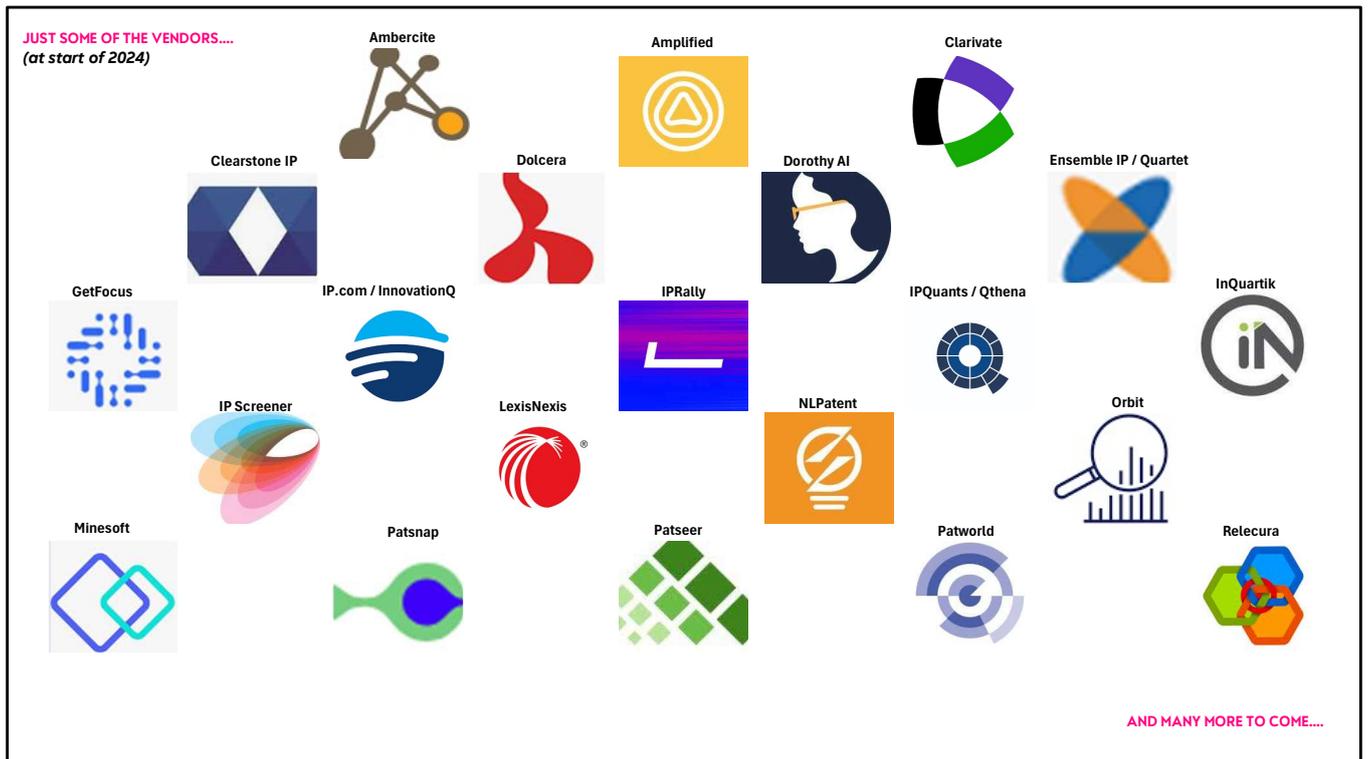
- Why look at tool providers?
- Issues to consider before starting
- Where to start?
- Evaluating the vendors
- Some technical stuff
- In hindsight...

Ultimately the final choice is determined by a company's patent strategy, workflows and budget – not something we can discuss in this meeting

In essence the whole presentation is through the lens of hindsight!

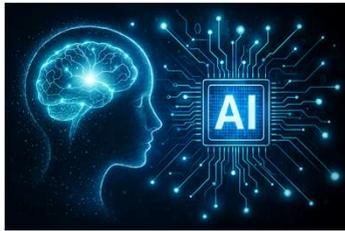


Guess the logo – patent sources are a fast moving area of development and choosing the time to conduct a review and implement new tools is challenging given the new players introducing AI tools.



We started reviewing at the beginning of 2024 and the list of vendors would be bigger today than 2 years ago  
 You can't predict what's coming around the corner, so whatever you end up changing to, you'll probably wish you held off for another year, then another...

## Why change / review patent search providers?



AI – a self-portrait

Created from a Co-Pilot prompt: what does AI look like as an image?

How is AI impacting patent search tools?



Fast moving AI developments

Who are all these 'new kids on the block'?



All the relevant documents now!

Will I lose out on coverage, timeliness, and traditional search capabilities by switching to a new system?



Is AI offering a good cost / benefit payoff?

- **AI** – rapidly changing functionality in searching and analysis
- Keeping **up to date** with developments
- “**new kids** on the block” – who are they, are they any good? Do they know what Patent information professionals really need?
- Broader **coverage** of jurisdictions, designs, file wrappers, links to external sources
- Cost / benefit – what’s good **value** for money? LLMs cost money for the vendor, whether hosted internally or not.

## Issues to consider before starting...



You'll need plenty of this

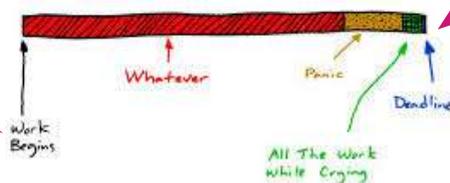
What is the budget for a new tool?



Can you forecast the prices for next year and beyond

Resources:  
Are you a team  
or on your own –  
you'll need help

### THE CREATIVE PROCESS



Do you have a deadline for making a decision?

- **Time** – you will need at least 6 months to do this properly depending on number of contenders
- What is your **budget** now and next year – an eager vendor might be keen to negotiate to keep within your budget
- **When** do you make a decision? – are budgets set mid-year, if so, starting at the beginning of the financial year is crucial
- **Resources** – are you a one-man band, part of a team, representing end-users (attorneys / R&D). Get help!

## Issues to consider before starting... Responsible AI

Does your company have a Responsible AI strategy?

If you are third party provider, what are the AI policies of your client?



Be prepared for lots of technical questions and filling in forms!

Can you run a trial first before putting in the guardrails?

Is the LLM hosted by the company or externally source?

**Internal IT support** – they can be both a help and a hindrance, especially for the AI guardrails.  
You will be the go-between.

## Where to start?



Markush, Chemical structures, biosequences, images, designs?

What do the end-users want from a patent search tool?

Form description

Quick start with

- Choice
- Text
- Date
- Ranking

Use questionnaires to find out what your users' needs are

### Think about:

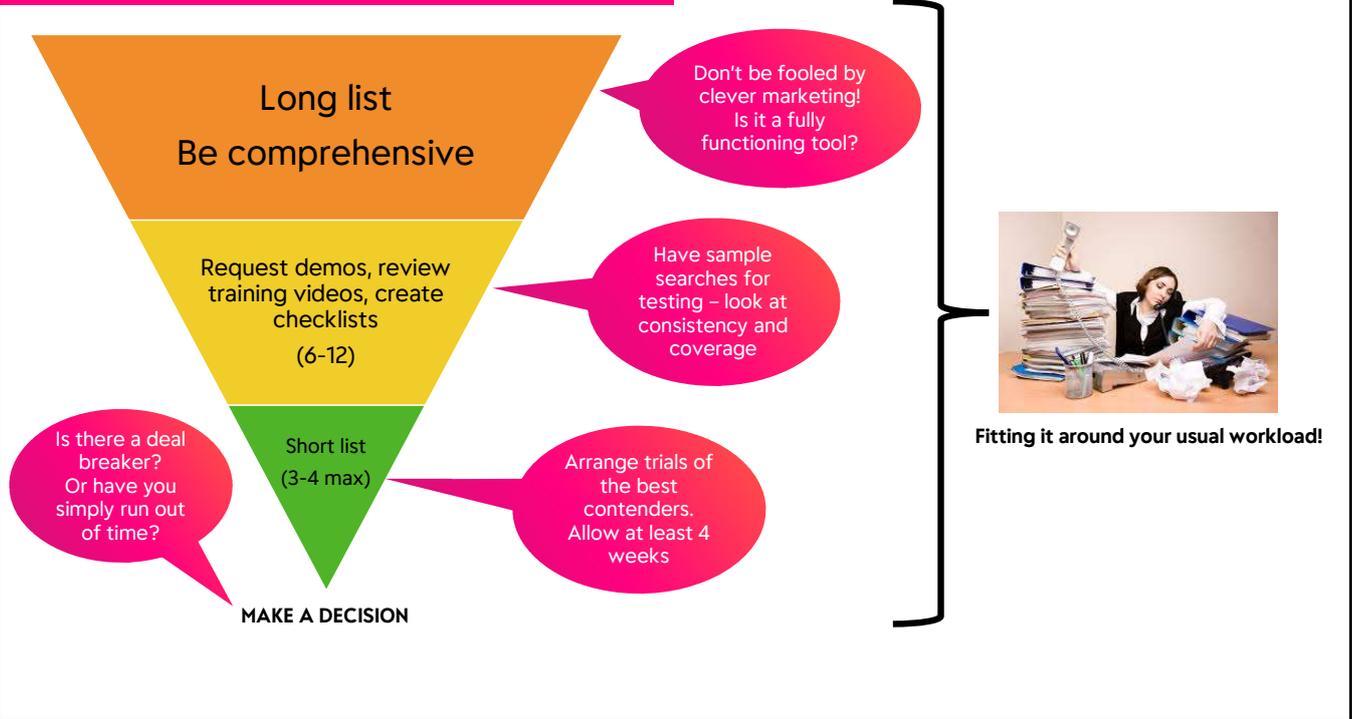
Current workflows  
Questionnaires / forms  
Usability (pro vs basic)  
Collate and prioritise features  
Knowing key differences between vendors  
Integrations with internal / external processes



Are you looking for an all-in-one solution or modular?  
How will it fit together?  
Are they priced separately?

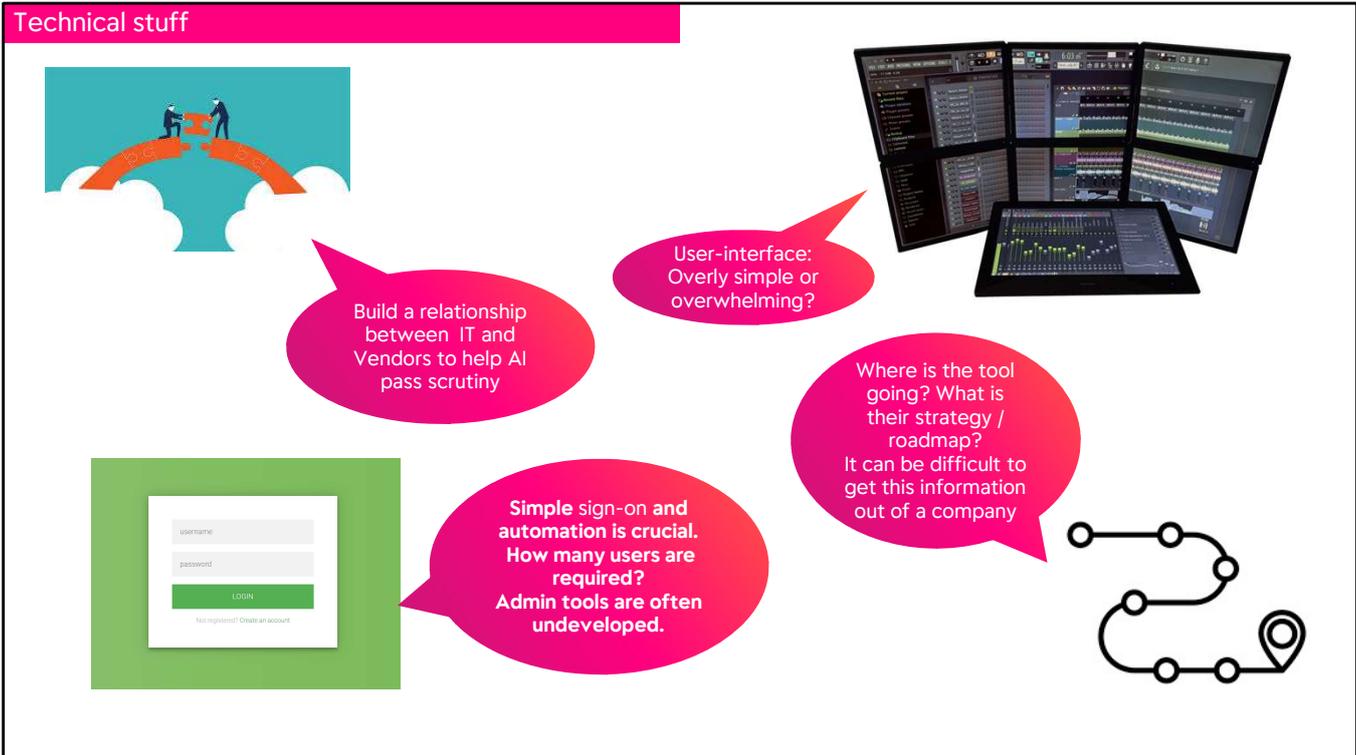
- Define **current workflows** and tools, what are the must haves and what are the interdependencies.
- Create a **questionnaire** for end-users that are non-technical. What do attorneys need compared to scientists?
- Google forms will create reports based on answers.
- Think about **usability** of a system. Collate all the requirements and **prioritise** – you can't have everything.
- Understand the **differences between vendors** – some are comprehensive IP services, others specialise in searching only.
- What **integrations** are needed – Express versions, workspaces, analysis tools. Providers typically use modules rather than one all-purpose tool.
- Discount what you **don't need** – for example, AI only driven search instead of Boolean. (a step too far?)

Vendor evaluation – from long list to short list



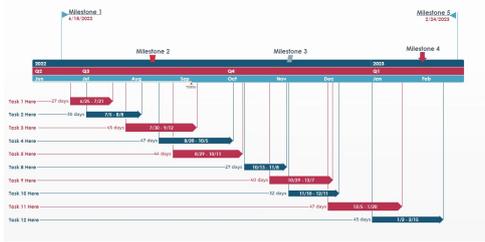
- **Long list** – be as comprehensive as you can.
- Request **demos** (give a good briefing on what you want to see to keep them to the point). Only follow-up on real contenders.
- **Review** vendor websites and training videos. Don't be fooled by clever marketing. Is it really a fully-functioning tool? Lots of new players doesn't make good players.
- Reduce to a **short list** (3-4 max) as quickly as possible, you won't have time to do any more.
- Rely a bit on **gut instinct** – you know what you like / don't like
- Arrange trials – at least 4 weeks!
- Fitting around **workload** is a challenge – can you combine testing by comparing to current system (not easy if customer is left waiting).
- Have **sample searches** that you can test – look for consistency of coverage and key patent numbers you expect to find. What are the family definitions?
- **Document vs family search** – quite a fundamental point to consider upfront. Attorneys like document systems, R&D prefer families.
- **Checklist** – record issues / good or bad features / follow-up questions.
- What is your ultimate **go / no-go** decision – cost, new features (AI), ease-of-use, or will you simply run out of time?

## Technical stuff



- AI – is this going to pass scrutiny? Important to **build relationship** with IT and Vendor, getting the right documents to the right people. Do they know you / your company?
- **User interface** – can it cope with dual monitors, text size, pop-ups, multiple windows – how busy does it get?
- Sign-on / **logging in** – how will this be managed / automated, how many users?
- **Administration tools** – often lacking or underdeveloped.
- **Roadmap** – where is this tool going, will you have any influence over its future. Can you negotiate this upfront?

## In hindsight... post-implementation



Have a flexible project plan. Four weeks of trials was insufficient

Help files aren't always helpful and there is an over reliance on Chat Boxes. Virtual training is best.

Attorneys, searchers or scientists? Meeting the needs of all users is challenging

Copying folders and queries to a new system? Whatever they offer in the deal, you'll probably end up doing it yourself

Role	Icon 1	Icon 2	Icon 3	Icon 4	Icon 5	Icon 6	Icon 7	Icon 8	Icon 9	Icon 10
Professional	●	●	●	●	●	●	●	●	●	●
Analyst	●	●	●	●	●	●	●	●	●	●
Viewer	●	●	●	●	●	●	●	●	●	●
Basic	●	●	●	●	●	●	●	●	●	●



- If you can make a (safe) short cut, do it. The whole process takes longer than you think. If the tool isn't matching key criteria, cross it off as early as possible
- 4 weeks of trial wasn't long enough. 2-3 months of serious use is a better evaluation. Keep asking to maintain access, they often will let you keep a trial account.
- Meeting the needs of all the users. Is it really possible for one vendor to do this successfully. Finding out that attorneys, searchers and R&D have very different needs. Some are met, but not all. What is the priority? A tool for you (the professional searcher) or the whole enterprise?
- Help files – bit of a let down, often not kept up to date. Reliance on chat boxes etc, which don't help!
- Vendor training sessions work well when tailored and flexible, and more efficient than in-house prepared, which is time-consuming.
- Transferring the existing queries, folders, alerts – whatever they offer to do on your behalf, you'll end up doing it because only you know if it's done right.

## In conclusion...

# THE LESSONS LEARNT ARE NOT NECESSARILY ABOUT WHAT IS ACHIEVED

- ❑ Don't be too ambitious – focus on 2-3 tools
- ❑ Push for longer trials than offered
- ❑ AI is rapidly evolving but traditional searching is still optimum for professionals
- ❑ Collaborative spaces vs searching – don't overlook the fundamental requirements and lose sight of the patent information
- ❑ AI guardrails means implementation takes longer (including the trial!)

**Time constraints** are major impact – Responsible AI is lengthening the time taken to trial and adopt new tools – bear this in mind.

If command line searching is key, don't get bamboozled by **fancy AI features**

**Collaboration** is a great area of development in many tools – goodbye spreadsheets?

**information quality** is still essential

***"The best way to learn is by doing.  
The worst way to evaluate is by  
assuming."***

***"Don't judge a tool by its manual—  
judge it by its trial."***

**Co-Pilot**

AI

I asked co-pilot for a quote about evaluating patent tools... These are fictional and unattributed.

Don't assume the features sold are functioning correctly. A trial period might result in revealing issues with the product even the vendor were unaware of!

**THANK YOU**

