



**Canadian
Intellectual Property
Office**

An Agency of
Industry Canada

**Office de la propriété
intellectuelle
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Un organisme
d'Industrie Canada

Canadian Intellectual Property Office

E-Business @ CIPO

April 15, 2010

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Canada 

DRAFT



Content/Purpose



- Historical Context
- Drivers for Change
- EBR Vision & Guiding Principles
- E-Business & Benefits
- Roadmapping & Portal
- Discovery
- Long-Term Strategy
- E-Business Phases & Roadmap
- More Than Just IM/IT

Historical Context



- TechSource Renewal
- Operational Systems Renewal
- Enterprise Business Renewal

Drivers for Change



Why CIPO needs renewal:

Internal drivers – “People Dimension”:

- Reduction in duplication of work across branches and increased consistency.
- Desire for more effective and paperless systems;
- Technology modernization leading to more user friendly, flexible and efficient systems (e.g., TechSource, INTREPID, DesignPlus);

External drivers – the “Client Voice”:

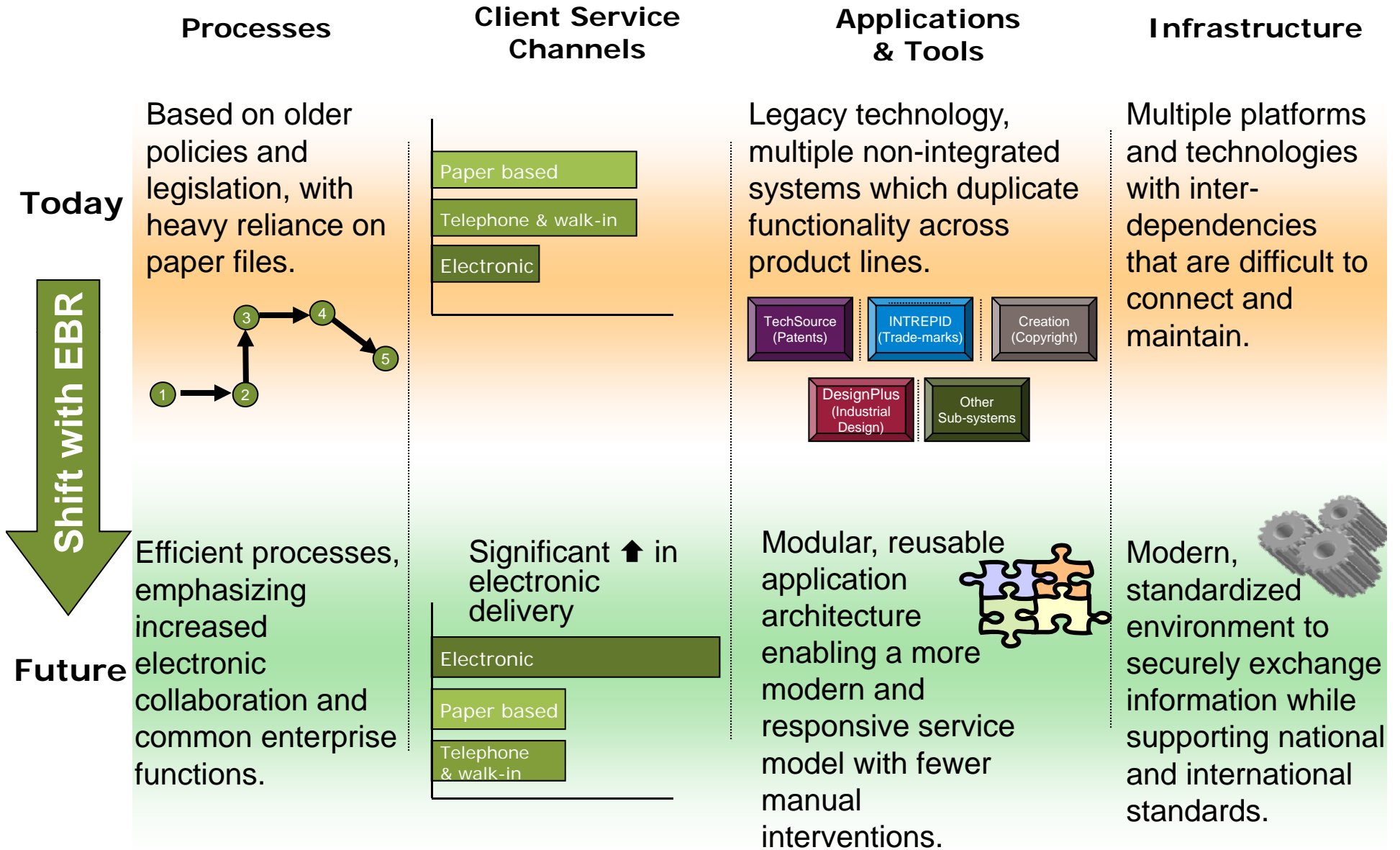
- Increased electronic services and access to data (more and better information available on the web);
- Faster decisions and turnaround times (TATs); and
- More simplified processes.

EBR Vision



By engaging our employees through a series of coordinated projects, CIPO will put in place a secure, cost-effective operational environment resulting in optimal client self-sufficiency and satisfaction. By 2012, CIPO will significantly improve and modernize its business processes, client service channels, tools and IT infrastructure.

EBR vision – “The Shift”



Maintain what works well . . . shift and adopt leading practices

EBR Guiding Principles



Single Face to the Client

Best Practices
& Proven Technologies

Modernized Processes

Leverage Existing Investments

Buy vs. Build

Reusable Solution Components

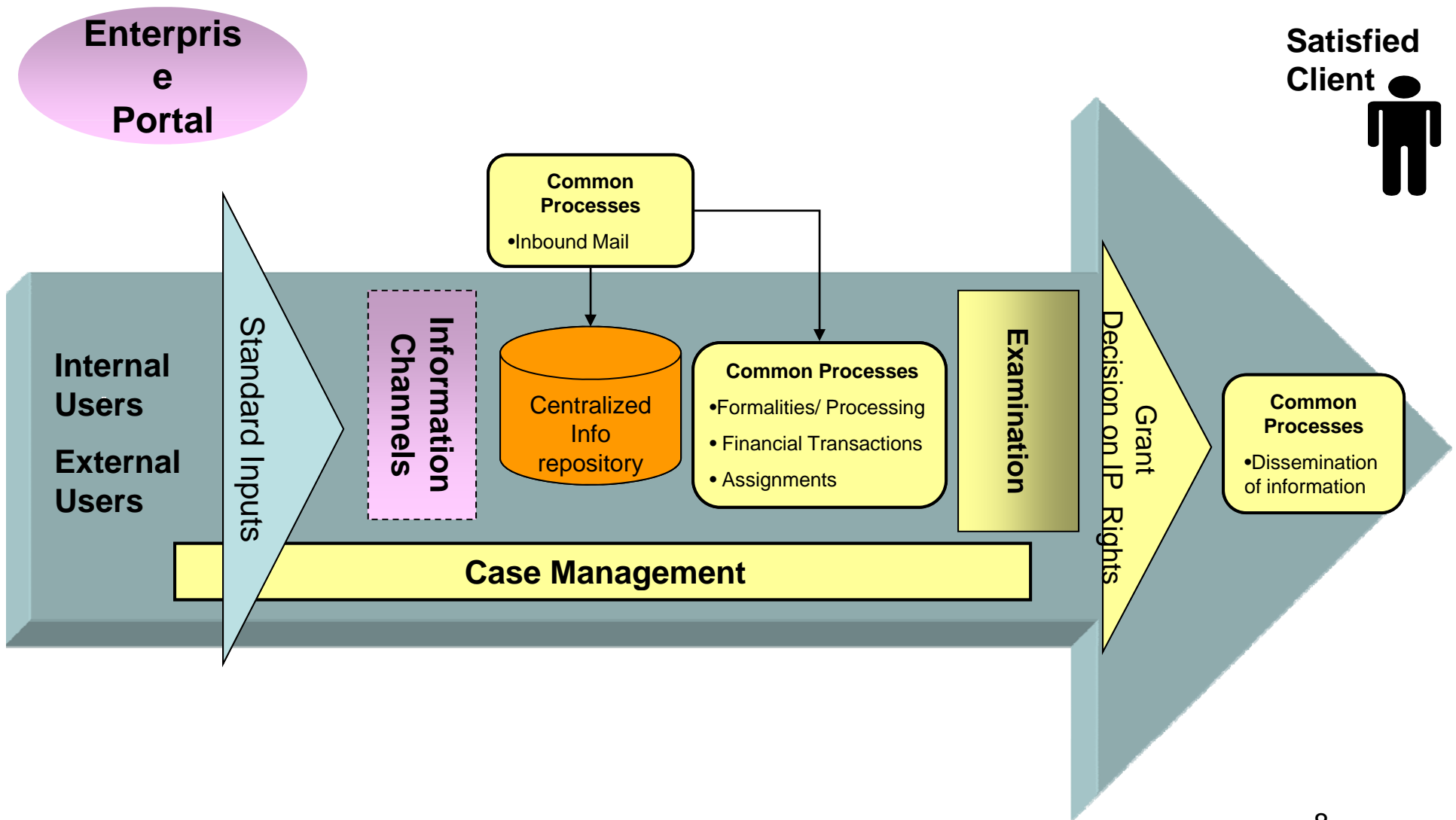
Deliver Innovative Quick Wins

Timely, Effective Employee Involvement

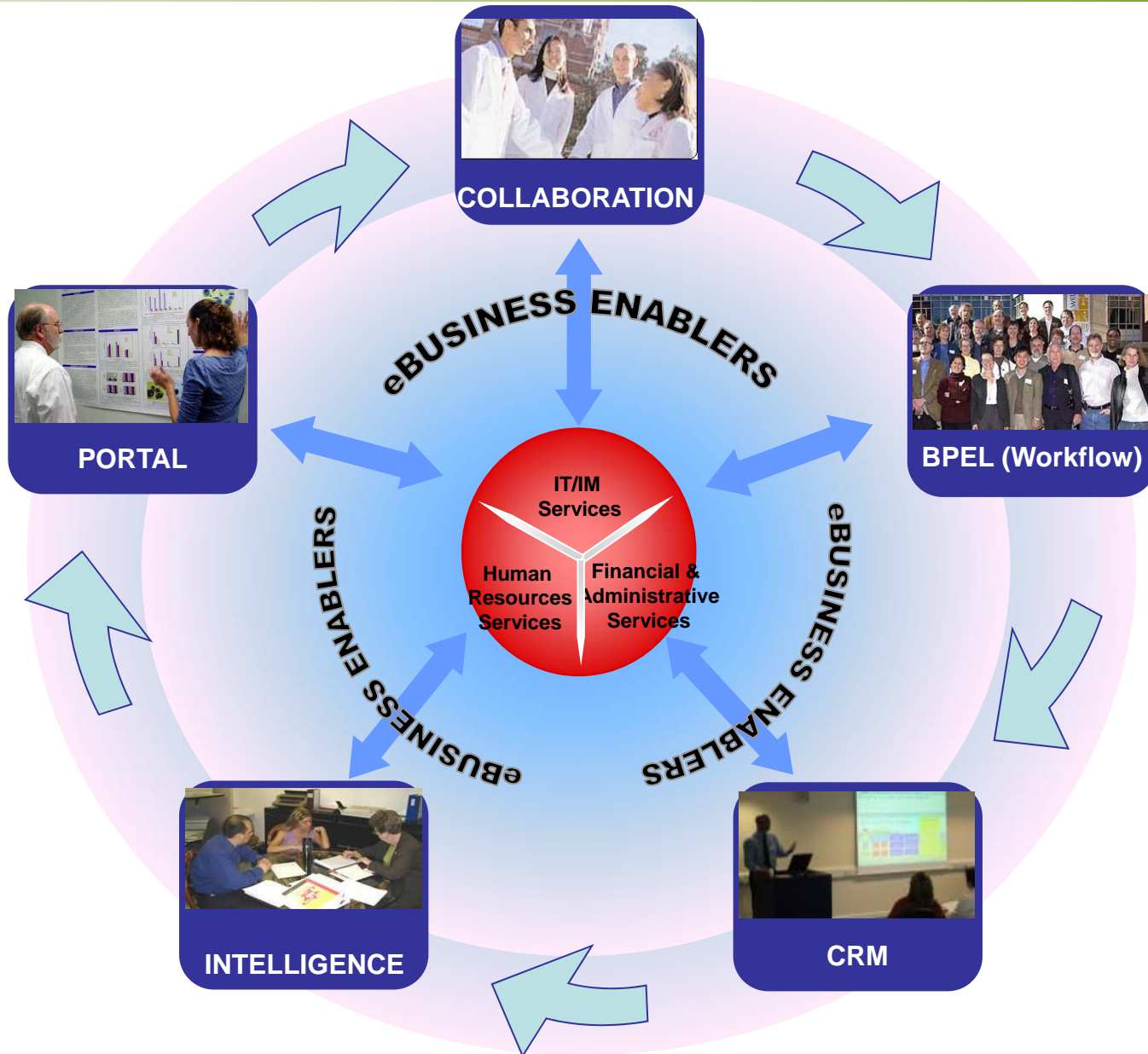
Deliver Value for Money

Realistic and Sustainable

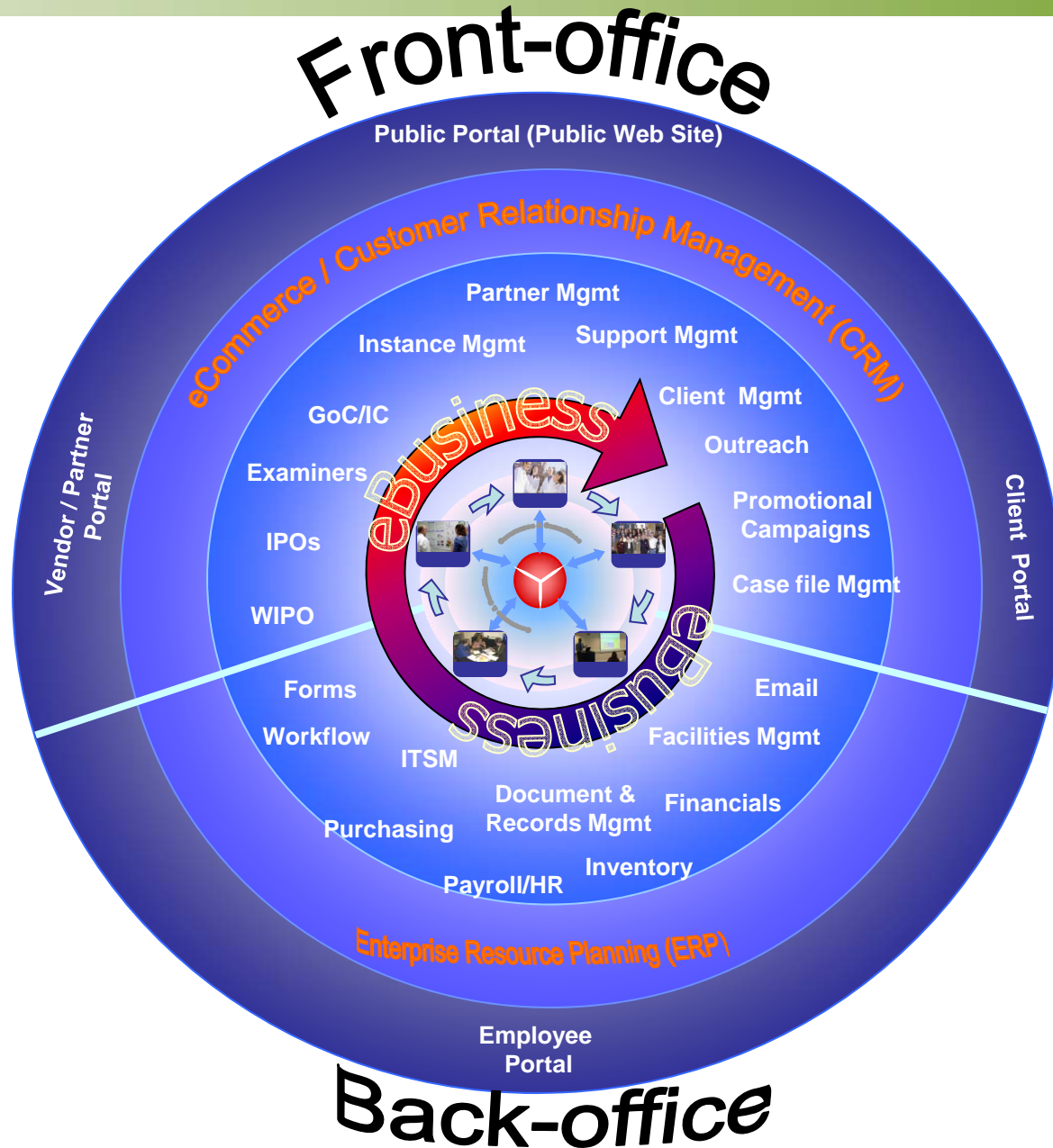
Service Delivery Model "To Be"



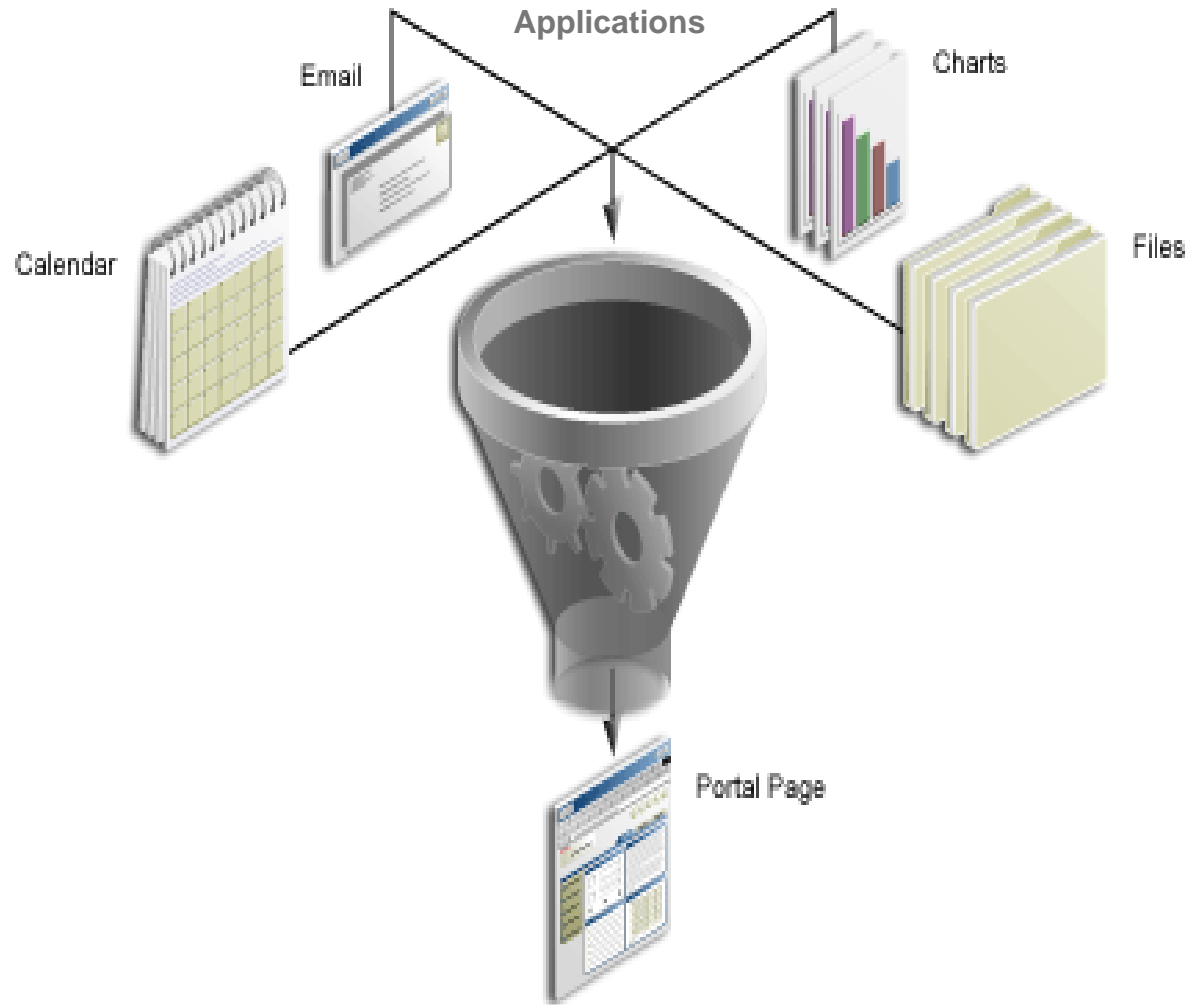
What is e-Business?



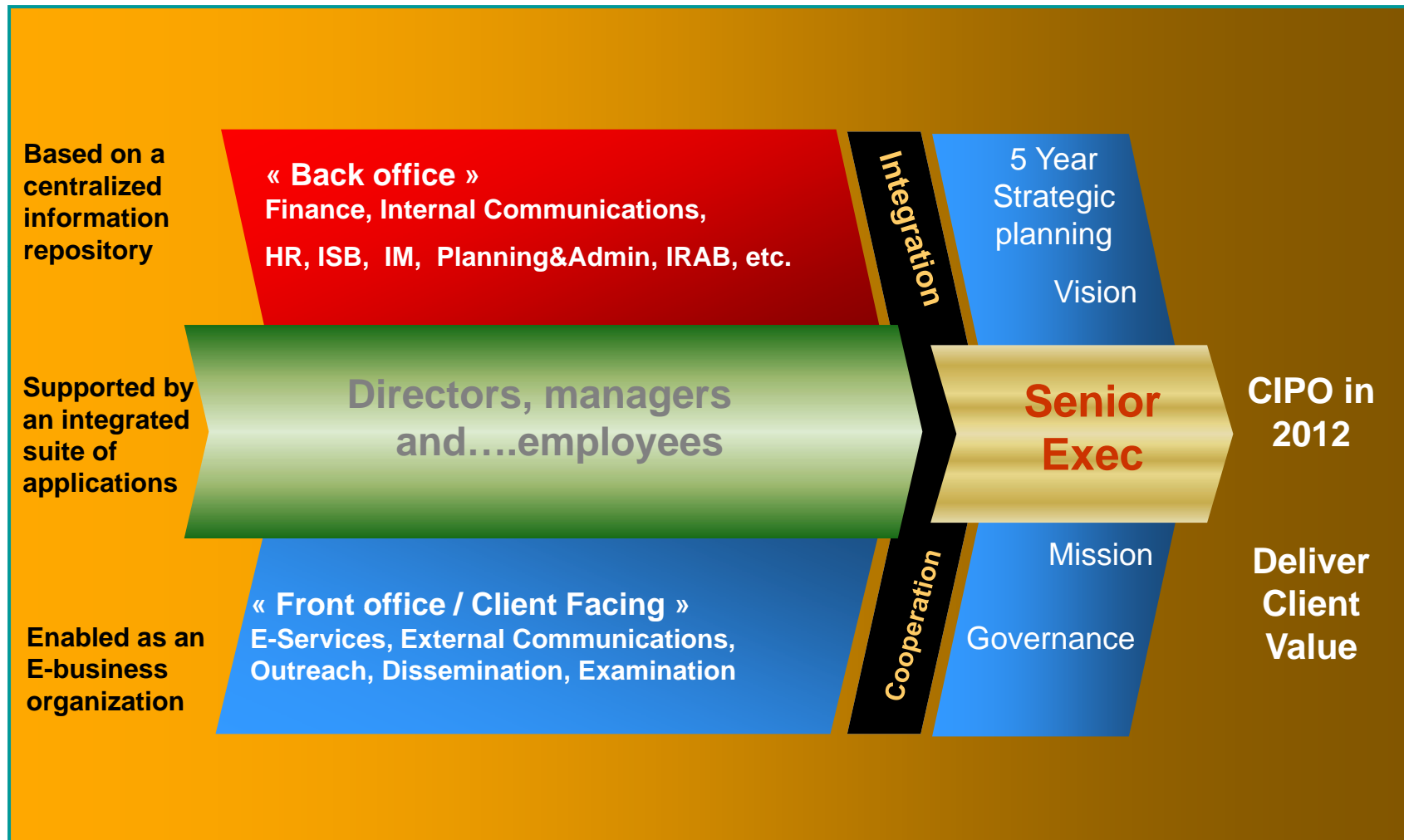
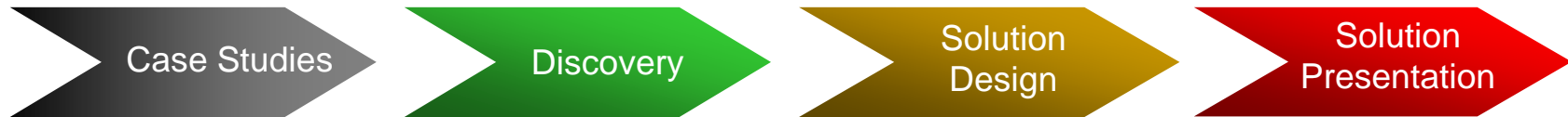
Benefits of an e-Business Model



Portal Features



A Roadmap to Align Stakeholders



Discovery Process



The discovery exercise is conducted to ensure that the recommended solution is aligned with the issues and challenges (requirements) facing key stakeholders.

The approach we used is described below:

1. Met with key stakeholders to understand the nature of the issues and challenges.
2. Requirements identified were classified into 3 types of categories:
 - Tactical
 - Consequential
 - Strategic
3. Key challenges/requirements further refined and defined.
4. Solution Map - E-Business Enablers
5. Strategic Value Assessment

Long-Term Strategy



- Map business requirements with common solutions that result in seamless integration, ease of maintenance, 'one-stop shopping' for information, adaptable infra-structure, etc.
- Use of Portal technologies to support a phased approach to initiatives
- In other words, a Client and Case Management solution integrated with back-office systems delivered through an Enterprise Portal

Summary of E-Business Phases



- © Functionality “option sets” were presented to senior CIPO executives using a phased timeline approach, culminating in the definition of three broad releases with corresponding “mandatory” foundational elements.

Phase 1

- ‘Task-Based Services’: existing and new e-service functionality clients use to interact with CIPO
- Mandatory foundation: Single Sign-On, Identity Management, Linking Identity to IP Holdings/Information

Phase 2

- Introduction of ‘Client Dashboards’: functionality which will provide clients the ability to view and manage their IP holdings
- Mandatory foundation: Business Process Management, including the development of explicit business rules and standardizing processes

Phase 3

- Business Process Integration: Full client self-service with end-to-end business process tracking, full transparency
- Mandatory foundation: Deployment of the Integrated Client and Case Management Solution (ICCMS, separate project to renew operational systems, currently in TB submission stage)

E-Business Roadmap



E-Business Phases	09 Q1-3	Q4	Ph1 (2010)	Ph2 (2011+)	Ph3 (2012+)
CIPO Enterprise Portal	Proof of Concept	Portal R&E for E-Business	Portal Hosting / Demos		
	E-Biz Strategic Planning & Scoping	Task Based Services Planning	Task-based Services	Introduce Dashboard Services	Ongoing E-Biz Solutions
	Content Services Framework	Content Services Framework	Content Services	Content Services (cont'd)	Future Content Services Integration
	Define Info Requirements	IM Planning	Map & Define Solution	Metadata Repository Implementation	CIPO Executive Dashboards
ICCMS	Analysis Phase (RFI)	Integration to Client Portal (Self Serve)		Integration to Portal (Technical)	CIPO Client Dashboards
	Analysis Phase (EPA)	Analysis Phase (EPA)	ICCMS (Phase I)	ICCMS (Phase I)	ICCMS (Phase II ++) (Legacies decommissioned)
Integration	Dept SAP Version 6 upgrade (Oct, 2010) PeopleSoft upgrade	Detailed Fit/Gap Analysis		SAP footprint expanded	SAP/ICCMS (FITT replaced)
	Finance Integration Analysis	FITT integration to Portal, IC SAP EFT and DA		Integration to ICCMS	Financials integration to LOBS - CIPO Finance Dashboard
Process Modernization	Standard Inputs (Includes initial Fee Payment Form)	Rationalize Forms & Online Services		Integration to ICCMS	
	Inbound Mail Assignments (Phase I)	E-Assignments Integration to Enterprise Portal		Integration to ICCMS	
	Formalities	Rationalize Rules across LOB		Integration to ICCMS	
	Branch specific Process Improvements (Business Process Mgmt)	Branch specific Process Improvements		Integration to E-Business Roadmap	Integration to E-Business Roadmap

LEGEND

Planning Stage

Implementation

IC Lead

Sunset

More than IM/IT...



In order for CIPO to facilitate the delivery and exchange of knowledge in the national and international IP community it will require us to harmonize:

➤ **People**

- Strong Executive Leadership team to be agents for change and committed to the duration of the e-business transformation (3+ years)

➤ **Process**

- Simplified, streamlined and harmonized where necessary

➤ **Technology**

- E-Business Suite (Integrated set) of Applications & Tools

