

Agenda

Introduction	38 minutes
Intellectual Property Management	1 hour, 2 minutes
Innovation Assessment & Market Research	
<i>Innovation Assessment</i>	1 hour, 36 minutes
<i>Market Research</i>	1 hour, 11 minutes
<i>Market Research Activity</i>	33 minutes
Reaching Potential Partners	
<i>Value Proposition</i>	54 minutes
<i>Marketing Plan</i>	37 minutes
<i>Effective Contact and Scaling</i>	45 minutes
<i>Question & Answer Review</i>	27 minutes
Licensing & Agreements	
<i>Functional Frameworks of an Agreement</i>	2 hours, 1 minute
<i>Other Agreements</i>	1 hour, 5 minutes
<i>Question & Answer Review</i>	26 minutes
Valuation	
<i>Creating Value</i>	1 hour, 12 minutes
<i>Valuation Approaches</i>	43 minutes
Negotiation	
<i>Negotiation Basics Pt. 1</i>	54 minutes
<i>Negotiation Basics Pt. 2</i>	1 hour, 13 minutes
<i>Mock Negotiation Activity</i>	19 minutes
<i>Negotiation Basics Pt. 3</i>	35 minutes
Beyond the Deal	1 hour, 28 minutes

Please Note: The time indicated here is the length of the recording. Additional time will be required to pause the videos and complete the activities on your own. Full session descriptions are on the following pages.

Session Descriptions

Intellectual Property Management

One of the foundations of a tech transfer program is intellectual property management – analyzing likelihood of patentability and/or other forms of IP protection, communicating with inventors about the often-complex process, and managing outside counsel and the attendant costs. We'll provide a high-level overview of intellectual property, including what makes an innovation patentable and the fundamentals of copyrights in the academic environment, and as well the basics of managing inventor communications and patent expenses.

Innovation Assessment & Market Research

With an ever-increasing pool of innovations to assess, time management and focusing on critical elements is essential. This session covers the major business, legal, and technical considerations used in assessing an invention disclosure in the context of the disclosure decision-making process itself and the broader strategic considerations around those decisions. Attendees will also learn the basic tools and methods needed to conduct market research. We will describe various types of market research, provide practical resources for performing research, and illuminate methods for discovering unmet market needs.

Reaching Potential Partners

In this session, we will start synthesizing the outcomes of your assessment, and market research to start marketing the technology. How do you develop and deliver a message that captures the attention of potential partners? How do you generate leads and effectively manage them? What untapped resources are available to you? And how can you pull it all together to create an effective, scalable marketing plan? We will explore tools and methods to keep you organized, productive, and focused on results.

Licensing & Agreements

Functional Framework of a License: The license is the apex of all our hard work to find a commercialization partner and negotiate a deal. We will show you how to see the forest for the trees in these sometimes-complex agreements by focusing on the underlying functional framework. We will close with drafting exercises to hone your skills in crafting clear and enforceable license provisions.

Other Agreements: How are your institution's innovations transferred into the hands of potential partners and collaborators? Throughout the process, you will rely on a number of agreements that let you share information, materials, experience, research activities, and intellectual property rights. This session will review the basics of CDAs/NDAs, MTAs, sponsored and collaborative research agreements, inter-institutional agreements, and others.

Valuation

It's time to start working with your partner on the financial terms of your deal. How do you take the information you learned during your assessment of the innovation and turn it into a term sheet that works for both you and your partner?

Negotiation

You know what you want and what you need out of a deal. So does your partner. It's time to learn the basics of negotiation to arrive at a licensing agreement that works for both of you.

Beyond the Deal

You may think you are done when you sign on the dotted line, but every successful technology transfer agreement starts a long, and hopefully successful, relationship. What role can you play to support the success of this relationship, and how does that impact your office and your own career development?

In this final presentation, all instructors participate in panels addressing the following topics:

- Managing Expectations
- Post Execution License Management
- Career Development