

IC² Institute and UTEN@Austin
August 10-21, 2009 Technology Transfer Training (T³)
Workshop

Presentations, Sessions, and Supporting Material

Monday August 10, 2009

Session Held at IC² Institute Global Classroom

8:30AM – Morning Presentations -

- **David Gibson, Associate Director of IC² Institute, UTEN@Austin Director**
 - UTEN: Where We Have Been and Where We Should Be Headed
- **Cliff Zintgraff, UTEN@Austin, Manager**
 - UTEN@Austin Technology Development: Where To From Here
- **Eli Mercer, UTEN@Austin Manager for Training and Internships**
 - August Workshop Overview
- **John Butler, Director of IC² Institute**
 - Diffusion Theory & Business Eco-Systems

Reading: “Diffusion Theory and Business Eco-Systems: Lessons from Austin Texas and IC² Institute”

11:30am – Manager’s Track Meeting

Noon – TT Manager Track Meeting with Dr. John Butler and Dr. David Gibson

- Open discussion on issues in Portuguese technology transfer between IC² staff and Portugal Technology Transfer Managers

2pm - TT Office Stakeholder Analysis and Exercises

- **Cliff Zintgraff**
 - Training and Internships: KTTA and Sustainability
- **Heath Naquin, UTEN@Austin Technology Assessment Team Lead, and Cliff Zintgraff**
 - Primary Research Methods and Interview Strategies

Readings:

- UTEN Technology Commercialization Report Template
- Quicklook Contact Log

Session Adjourned at 6:30pm

Tuesday August 11, 2009

Session Held at IC² Institute Global Classroom

8:30AM- Morning Presentation, Dr. Kate Mackie, Senior Lecturer in High-Tech Marketing, UT Austin and MSTC Program at IC² Institute

- Discussion and exercise on building a marketing plan for a TTO

- Interns have previously read the book Crossing the Chasm and answered study questions using online discussion forums prior to class, then discussed the book's lessons

Presentation: Marketing Technological Innovations: IC² Institute & Portugal

Reading: Marketing Plan Template

Exercise: Work on Draft Marketing Plan (15 exercises total)

2pm Afternoon Session with Dr. Mackie

Exercise: Draft your internal and external T^TO Marketing Plan for each T^TI Intern, 15 Exercise sheets total (Example: T^TO SWOT Analysis, Positioning Statement, and

4:00PM: Visit with Laura Kilcrease, Director of Triton Ventures

(<http://www.tritonventures.com/>)

- Discussions on Technology Transfer and Commercialization from a University Environment

Session Adjourned at 6pm

7:00PM: Networking Dinner at Dr. Gibson's home

Wednesday August 12, 2009

Session Held at IC² Institute Global Classroom

8:30AM Joseph Picken, Executive Director of the Institute for Innovation and Entrepreneurship at UT Dallas (<http://innovation.utdallas.edu/>)

- How UT Dallas has developed its entrepreneurship initiatives

Presentation: Launching and Growing the UT-Dallas Institute for Innovation and Entrepreneurship

10:30AM Dr. Robert Robb, Associate Vice President for Technology Commercialization at UT Dallas OTC (<http://www.utdallas.edu/otc/>)

- How should a technology commercialization office prioritize its activities and what model should they use?

Presentation: Technology Commercialization: Initial Considerations for Organization, Policy, Philosophy, Process & Goals

3:00 PM – Gary Cadenhead, Program Director of the MSTC Program at the IC² Institute

- A systematic exploration of the basics of technology commercialization

Presentation: Case Examples

4:00 PM – Emergent Technologies Dale Gannaway, Vice President for Business Development; and Tony Taylor, Director of Strategic Planning (<http://www.emergentechnologies.com/>)

- An overview of Emergent Technologies, Inc. with a focus on their strategy for regional economic development

Presentation: Civic Entrepreneurs: Economic Professionals as Collaborative Leaders

Reading: “Civic Entrepreneurs: Economic Professional as Collaborative Leader” by Douglas Henton, John Melville, & Kimberly Walesh

Session Adjourned at 6pm

Thursday August 13, 2009

Session Held in Global Classroom and Meeting Rooms at IC²

All Day- Business Development: Calling US Experts

An Exercise in Cold Calling and Primary Source Interviews with US Experts

Morning - Heath Naquin

Presentations: Primary Research Methods

- Focused on how to choose people to interview for a technology screen, how to perform secondary research to make the most of interviews, instruction on how to contact potential interview contacts, and tips for conducting the actual interview

Cliff Zintgraff

Presentation: Primary Research Methods

- Focused on a system of making contact with interviewees for technologies that integrates phone calls and email contacts within the context of the MarketLook assessment system

Jeremy Carter,

Presentation: Primary Research Methods

- Case study of Jeremy’s approach to making market contacts for MarketLooks, including email contacts, phone calls, preparation, and guidance on content to cover during phone calls

Mid-Morning to Afternoon

The rest of the day was devoted to individual work with each intern who made phone calls to determine the market value of the technologies they brought from Portugal.

- Each intern made several phone calls to US contacts on interview lists they created
- Each intern spoke to several industry experts, scientists, and potential buyers of their technologies to ascertain where in the market their technology would be most valuable
- All interns reported success in gathering more perspectives on their technology and expressed confidence that they could perform such interviews in the future

11:30am – Manager’s Track Meeting with UTEN and IC² Staff

- Discussion on the issues and challenges in managing a TTO in Portugal and building a national TTO network in Portugal

2pm – Discussion with Heath Naquin and Cliff Zintgraff on Phone Interviews

- All interns shared their opinions and evaluation of their performance during the day

Session Adjourned at 6:30pm

Friday August 14, 2009

Session Held at IC² Institute Global Classroom

All Day- Rick Friedman, Associate Director of Licensing at UT Austin Office of Technology Commercialization (<http://www.otc.utexas.edu/>)

Presentation: Licensing Negotiations

- Mr. Friedman discussed how to effectively negotiate licenses by exploring negotiation methods
- All interns participated in two exercises to hone their negotiation skills
- Exercise #1 UGLI Orange- Interns simulated negotiations between rival corporations In teams of two. This exercise taught participants how to find and leverage common interests as well as gave them practice in selectively revealing information in negotiation
- Exercise #2 Charge Inc.- This exercise taught interns how to think about the interests of their university/TTO and those of companies in licensing negotiations

12:30pm - Executive Lunch with guest Dr. Darius Mahdjoubi, Visiting Scholar at IC² Institute

Afternoon: Interns participated in Individual Exercises with UT OTC Staff, Including Ray Atilano, Jittendra Jain, and Max Green

Session Adjourned at 6pm

7pm – Dinner and Networking at Dr. Kate Mackie’s House

Monday August 17, 2009

Session Held at IC² Institute Global Classroom

8:30am – Crafting a Strategy for your TTO with Ken Porter, Former Director of South Texas Technology Management (<http://www.utsystem.edu/sttm/index.shtml>)

Presentation: TTO Strategy and Office Structure

- Mr. Porter covered how to choose the right structure for a TTO based on strategic goals and how to hire and motivate talented employees

10am – Meg Wilson, Instructor in the Master’s of Science in Technology Commercialization Program at IC² Institute

Presentation: University Technology Transfer Processes

- Mrs. Wilson discussed the implications behind technology transfer policy decisions, the gulf in culture between universities and corporations, and talked about how to manage commercialization so that it supports and enhances a university

2pm – Presentations of TTO Marketing Plans by Intern Teams, Panel of Evaluators Included Dr. Kate Mackie and UTEN@Austin team

- Four intern teams presented their plans for marketing their TT offices
 - TecMinho, University of Minho

- IST
- UATEC, University of Aveiro
- University of Portugal (Virtual)
- Plans included a statement positioning each TTO relevant to competitors, an overview of how each TTO would serve its stakeholder's needs, and a Strengths Weaknesses Opportunities and Threats Analysis

Session Adjourned at 6pm

Tuesday August 18, 2009

Session Held at IC² Institute Global Classroom

8:30am – John Fritz and Sean Thompson, Licensing Associates at South Texas Technology Management

Presentation: STTM Deep Dive into Case Management

Readings and Handouts:

- Model Technology Transfer Process
- Invention Analysis Form & Checklist
- Patent License Agreement Template
- Invention Analysis Sample
- Invention Summary Example (2 separate documents)
- IP Search Example
- Royalty and Net Income Calculation Spreadsheets

Lunch – Executive Guests Keith Moe, Former CEO of 3M, and Larry Secret, Research fellow at IC² Institute and Former CEO of Hydrolab

2pm – Discussion on Case Management with John Fritz, Sean Montgomery, and Portuguese Interns

Exercise: Each team visually mapped the technology transfer processes operating in their TTO

- Discussion focused on the rationale behind select technology transfer processes at different TTOs

Session Adjourned at 6:30pm

Wednesday August 19, 2009

Session Held at IC² Institute Global Classroom

8:30am – Brett Cornwell, Director of Commercialization Services at Texas A&M's Office of Technology Commercialization (<http://otc.tamu.edu/>)

Presentation: Startups and Corporate Relations

Readings:

- VMH Health Executive Summary
- VMH Health Business Plan
- VMH Health Complete Approval Package for Texas A&M Chancellor

Lunch – Executive Guest Marta Vieira, US Manager of Y Dreams

2pm – Spinout Exercises with Brett Cornwell

- Discussion covered the advantages of spin-offs and licensing, the importance of beneficial industry-university ties, and key elements of A&M successful model

Session Adjourned at 6:30pm

Thursday August 20, 2009

Session Held at IC² Institute Global Classroom

8:30am – Dr. Jonathan Bard, UT Professor of Mechanical Engineering

Presentation: The Essentials of Project Management (4 Parts): Essentials, Organization and Scheduling, Project Selection, and a Scheduling Example

Handouts: Spreadsheet showing an example of a project scheduling problem

- Presentation covered project management and how to use it to manage large and complex projects involving many resources and people

12:30 pm – Executive Lunch with guest Bill Hulsey, Principal of Hulsey Intellectual Property Lawyers

2pm – Scott Evans, Vice President for Business Development at Pretium Innovation

(<http://www.pretiumllc.com/index.htm>)

Presentation: Applying Innovation Science to Technology Commercialization

Handout: Crowd Innovation for UTEN

- Presentation focused on applying the techniques of crowd-sourcing to solving problems in technology transfer, especially in discovering the market potential of technologies

Session Adjourned at 6:30pm

Friday August 21, 2009

Session Held at Hill Country Room in MCC Building

All Day – Interns Make Final Strategy Presentations to UTEN Team and Distinguished Panel

Panel Members

- Dr. Jonathan Bard, Professor of Mechanical Engineering at UT
- John Cole, Interim Director of South Texas Technology Management
- Brett Cornwell, Director of Commercialization Services at Texas A&M's Office of Technology Commercialization
- Rick Friedman, Associate Director of Licensing at UT Austin Office of Technology Commercialization
- Dr. David Gibson, UTEN@Austin Director
- Elaine Jones, UTEN@Austin Training and Internships Consultant
- Laura Kilcrease, Managing Director of Triton Ventures

- Eli Mercer, UTEN@Austin Manager of Training and Internships
- Cliff Zintgraff, UTEN@Austin Program Manager

Presentations in Order of Appearance

- TecMinho, University of Minho
- UATEC, University of Aveiro
- INPI
- INOVISA, Technical University of Lisbon
- IST
- Alto-Douro

5pm – Technology Transfer Training 2009 Graduation Ceremony

- Each intern received a certificate declaring their successful completion of UTEN's T³ Training Program and recognition of their accomplishment from all UTEN staff

Session Adjourned at 6pm