

Dashboard Driven IP Portfolio Management

Welcoming remarks will begin at
11:55 a.m. Eastern Time.

The formal presentation will begin at Noon Eastern

For audio, dial in by phone:

+1-866-365-4406

Access code 5627649

For a list of **international** toll-free numbers check your confirmation email for the direct link.

Dashboard Driven IP Portfolio Management

Moderated by:

Jill Sorensen, Bilyan, LLC

Speakers:

Barry Datlof

Michael Manion, *InventionEvaluator*

David Waddell, *Inprisys Ltd*

September 25, 2013

**Thank you to our
sponsor.**



Questions?

**We will be taking questions at the
conclusion of the presentation.**

Operator Assistance

Audio difficulties: Dial 0 0

Other issues: +1-847-559-0846

**Remember
to complete your survey
after the event.**

Thank You!



AUTM Professional Development Programs

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AUTM Professional Development Programs

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Advancing Discoveries for a Better World®

Welcome AUTM Members

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Discounted Pricing

- Professional development courses
- Annual Meeting
- Online courses
- Online job posting
- Membership mailing lists

• Access to AUTM Publications

- *AUTM Better World Report*
- AUTM Salary Survey
- AUTM Technology Transfer Practice Manual
- AUTM Licensing Activity Survey (currently for United States and Canada)
- AUTM Update

Member Benefits

In-person and Online Networking

- Special Interest Groups (SIGS)
- Online Discussion Groups
- Volunteer committees
- Partnership Forum at Annual Meeting
- Meetings at national and regional levels

Additional Benefits

- Updates on legislative activity and how it affects you
- Meeting proceedings and presentations
- Member discount on the AUTM Licensing Activity Survey (currently for United States and Canada)
- Access to post data on the **Global Technology Portal**

Member Benefits



The screenshot shows the AUTM Education Library page. At the top, there is a navigation bar with links for 'Careers & Training', 'Media & Data', 'Get Involved', 'My AUTM', and 'About'. Below this is the AUTM logo and a search bar. The main heading is 'AUTM Education Library'. A welcome message states: 'Welcome to the AUTM Education Library. This members' only resource provides access to select Annual Meeting workshop and educational track recordings, AUTM webinar recordings and other online learning tools. To use the library, search by keywords and, if necessary, narrow your search by filtering using the categories below. If your search does not produce the content you're looking for, search the full AUTM website for other resources using the search bar located at the top right of the website.' Below the message is a search input field and a 'Filter by Category' section with a list of keywords including 'BioTech', 'collaboration', 'commercialization', 'contracts', 'copyright', 'cost saving', 'education', 'energy', 'innovation', 'industry', 'international', 'law', 'negotiation', 'operations', 'partnerships', 'patent', 'payments', 'pharma', 'plant', 'varieties', 'public', 'relations', 'regulation', 'research', 'royalty', 'rates', 'social', 'media', 'software', 'staff', 'staffing', 'startups', 'strategies', 'strategy', 'tactics', 'technology', 'disclosure', 'technology', 'transfer', 'third', 'world', 'statements', 'university', 'spinoffs', 'university-industry', 'linkages'. At the bottom, there are options to 'Change appearance', 'Sort alphabetically', and 'Sort by strength'.

Introducing AUTM's newest member benefit

AUTM Education Library

Seeded content:

- 23 Annual Meeting workshop recordings
- 10 relevant links to the TTP Manual
- 5 educational webinar recordings
- Additional content added annually by committee

<http://www.autm.net/source/ed-library/index.cfm>

Member Benefits

The AUTM Global Technology Portal (GTP)



The screenshot shows the AUTM Global Technology Portal (GTP) website. At the top, there is a navigation bar with links for 'Home', 'Organizations', 'Technologies', 'Needs', 'Capabilities', 'Startups', 'Success stories', and 'People'. Below this is the AUTM logo and a search bar. The main heading is 'The AUTM Global Technology Portal (GTP)'. A welcome message states: 'Welcome to the AUTM Global Technology Portal, where you can easily find the latest university technologies available for licensing worldwide.' Below the message is a large image of a hand holding a blue folder. To the right of the image is a 'Technologies' section with two items: 'Low-Temperature, Corrosion-Resistant Integrated Heat Exchangers to Improve Efficiency of Coal Plants' and 'Controlling and Predicting the Stability of a Protein Against Degradation by Proteases'. At the bottom, there is a 'Get ready for the AUTM 2012 Annual Meeting by posting your technologies and capabilities' button.

AUTM Global Technology Portal



If you're an **AUTM member**, you're already signed up for the GTP. Simply login with your AUTM member login and password.

GTP.AUTM.NET



Jill Sorensen, J.D.
Senior Innovation Manager

Bilyan, LLC



Barry M. Datlof
Licensing Officer

U.S. Army Medical Research and
Materiel Command



Michael Manion
BSc(Hons), Ph.D. M.B.A., GAICD

Chief Executive Officer

InventionEvaluator



David Waddell
Chief Executive Officer

Inprisys Ltd.

Waltzing Matilda: Personal Professional Dashboard



Barry Datlof
Licensing Officer
U.S. Army Medical Research and Materiel Command



FOR people facilitating technology commercialization

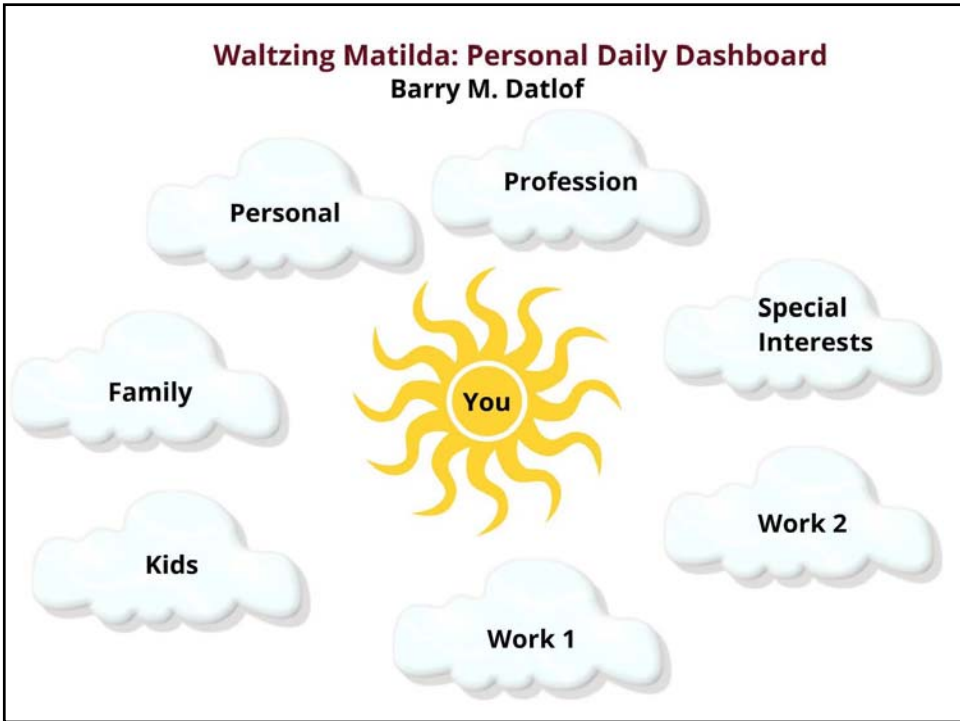
WHO need to cooperatively create, modify, store, discuss, present and use information

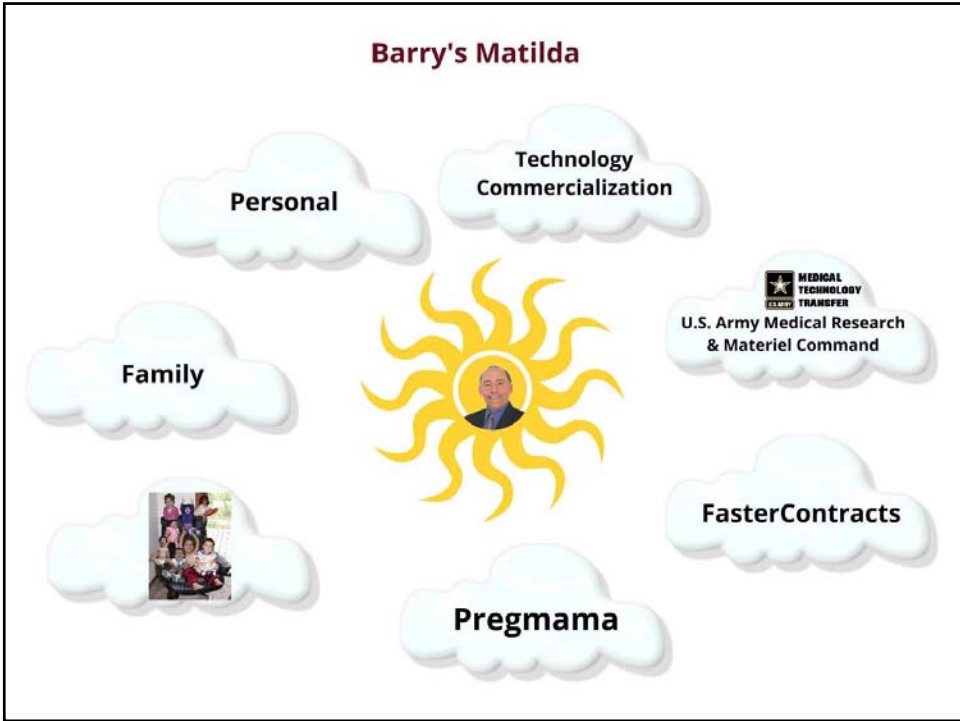
MATILDA is a web-based, **daily dashboard** and **social network**

THAT allows multiple authors, editors, and users to share knowledge, Q&As, reference material, slides, feedback and other information;

UNLIKE portals that have a limited scope of sharing and inherently lead to information sequestration and expiration

MATILDA leverages collective wisdom and facilitates **daily** input and utilization by emphasizing collaborative input, reuse, and personalization





Knowledge Transfer Has Improved

Distance – Speed – Density – Multiplex – Cost

The icons are arranged in three rows:

- Row 1: A man shouting (distance), a drum (speed), a cave painting (density), an open book (multiplex), a torch (cost), a horse (distance), a bell (multiplex).
- Row 2: A newspaper (multiplex), an open book (multiplex), a typewriter (multiplex), a gramophone (multiplex), a rotary phone (multiplex), a clock tower (multiplex).
- Row 3: A television (multiplex), a fax machine (multiplex), a desktop computer (multiplex), a laptop (multiplex), a smartphone (multiplex), a tablet (multiplex).

What's a Dashboard/Portal/Home Page?

Web Site = you go there sometimes

Home Page = default web site on browser - survey

Daily Dashboard

- should be default home page
- where you spend most of your time every day
- enables interacting online with others
- provides links to content and other sites





Does This Get Your Work Done?

The New York Times SATURDAY, MAY 26, 2012
Historical Choice: News
Manist Rebels Suspected as Indian Train Derails
Safety Rules Can't Keep Up With Biotech Industry
Oxford Tradition Comes to This: 'Death' (Exponent)
Adviser to Stars Named in Fraud
Deal Near to Approve More N.Y. Charter Schools
 Expert customer service is alive and well. Not automated. CHASE Sapphire. Learn about expert service at CHASESAPPHIRE.COM

Do
You
Go
Here
Daily?

AUTM Association of University Technology Managers®
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Members Government Industry Media

Connect with your colleagues at an AUTM Region Meeting

AUTM 2013 Eastern Region Meeting
Sept. 9 – 10, Boston, MA

AUTM 2013 Western Region Meeting
Sept. 30 – Oct. 1, Portland, Oregon

Eastern Region Meeting
Sept. 9–10
Boston, MA USA

Western Region Meeting
Sept. 30–Oct. 1
Portland, OR USA

Benefits to You
AUTM members get instant access to online networking and helpful resources and deep discounts on AUTM events and surveys.
View member benefits >

Upcoming Events
• Eastern Region Meeting
• Western Region Meeting
• AUTM 2014 Annual Meeting
Browse more events >

Volunteer with AUTM
Get involved by supporting a committee that suits your interests and availability.
Volunteer today >

MEMBERS
Renew Your Membership
Awards and Scholarships
Career Center
Discussion Groups

GOVERNMENT
About Technology Transfer
Bayh-Dole Act
Better World Project
Local Legislative Issues

INDUSTRY
Attend an Event
Become a Sponsor
Find University Technologies

AUTM NETWORK
AUTM Annual Meeting
AUTM Foundation
Better World Project
Global Technology Portal

CONNECT
Twitter Facebook LinkedIn

ASSOCIATION OF UNIVERSITY TECHNOLOGY MANAGERS
111 Deer Lake Road, Suite 100
Dover, NJ 07801, USA
Phone: +1 (847) 559-5548
Fax: +1 (847) 450-9282
info@autm.net

ATTP

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Follow @AUTM, @AUTM, @AUTM

Start Pages Era

Link and widget aggregators

→

→

My Yahoo! - Windows Internet Explorer
 http://cm.my.yahoo.com/

File Edit View Favorites Tools Help Links Customize Links Simpy This!

My Yahoo!

Make My Yahoo! your home page

MY YAHOO! BETA Search: Web Search

Web | Images | Video | Local | Shopping | more

Welcome back. Sign in, then dig into your page. [Sign In](#) I'm new here.

Yahoo! Home My Main Page Add Page

Personalize this page How much is that in dollars? Share this page

My Quicklinks

- Answers
- Autos
- Finance
- Games
- Geocities
- Groups
- HotJobs
- Mail
- Maps
- Movies
- Music
- Personals
- Real Estate
- Shopping
- Sports
- TV
- Tech
- Travel
- Yellow Pages

Today

Featured Entertainment Sports Video

Get him to open up
 Choosing the right time and place to talk can maximize the chances of getting through. = 4 tips

- Instant intimacy boosters
- Find relationship advice

How to get your man to open up to you
 Watch NASA video of shuttle Atlantis landing
 Teen phenom eyes unique Olympic feat
 One male 'Idol' blow Simon away

More Featured

Top Stories

Featured World Local Finance

As of 11:30 am PST

- Powerful Teamsters union to endorse Obama
- New violence traps thousands of Darfurians
- Supreme Court limits lawsuits over medical devices
- N.J. college under lockdown after emailed bomb threats
- 11 U.S. children's attorneys to keep name with India's 'China's nearest

Personal Assistant

Mail Horoscope Portfolio

Weather 66°F Lottery Sports

ADVERTISEMENT

Get the Best Value in Broadband
Verizon High Speed Internet
 First Month FREE
\$12.99 per month*
 *for months 2-4 with 3-year agreement

Get Connected

Done Internet | Protected Mode: Off 100%

MSN Home news entertainment more

my msn

Web | MSN | Images | Video | News | Maps

bing

MSN Home Mail Sign In

Wednesday, January 27, 2010

Default page Add a Page

Customize Add Content

Today on MSN

All-Wheel All-Pros
 2010's top 4WD vehicles

MORE ORISMI
 • Baby, you're not actually a bad parent
 • Teeth too white?
 • Shop chocolate for your sweetheart
 • 4 Boston recipes
 • Is grass-fed beef just as risky?

Persons

Latest product recalls
 From strollers and medication to food and children's toys, see what products have been recalled recently and why.

Top People

Paula Abdul on 'Dancing'
 Greg Ginn apologizes
 All My Children's patriarch
 Lucy Liu's 'spartan'
 Nancy Kerrigan's brother
 Karlie Alley's Twitter war

Hot Topics

Federline's depression
 State of the Union address
 ACORN investigator is arrested
 Pro Bowl roster
 Second pregnant man?
 Saab still running

MSN Video

Wednesday, Jan. 27: Laigne & Perry on 'Idol,' Cheating ACCUSED

MSN Top Stories

Gibbs: Obama to outline 'superficial track'

- Obama's test: We back a nation's confidence
- BEF: World of chaos envelops Matt's lab
- FBI: U.S. seizes with olive branch for Taliban
- Sales of new homes sink 7.4 percent last month

FOX Sports News, Scores, Games & Features

- Federline: Seven narrative stars, Venus, Dyanika ousted
- Gamercatch hand file: Kentucky first loss
- UK's loss shows no team will dominate
- Vikings: No deadline for Favre decision
- A's reach one-year deal with Sheets worth \$18M

MSN Entertainment Highlights

- Anna Escobar lost growth worth millions
- Report: Boyle feeds horse intruder
- Idol: Katy Perry puts Kara in hot place
- Video: 5 'Lost' seasons in five minutes
- Opinion: Grammy's 'ghosts' cast shadows

Wonderwall

The Shortlist for Jan. 27

- Hayden Panettiere on 'New Red' De: 'Viva! Tired of Being a Blonde'
- Gene from 'Tonight' Conan still produces for NBC
- Jennifer Lopez to guest on 'You EMet Your Mother'
- Report: Charlie Sheen's Wife Is on Drug Alcohol Rehab

Add Content

Search or choose from MSN recommended sources for content to

save 15%
 SHOP NOW
 teleflora
 Valentine's Day is Feb. 14

Advertisement

Weather

msn weather
 New York, NY - Clear, 32°

Wednesday	Thursday	Friday	Saturday
41° / 29°	41° / 19°	27° / 18°	29° / 18°

Data provided for US and Canada by WOT

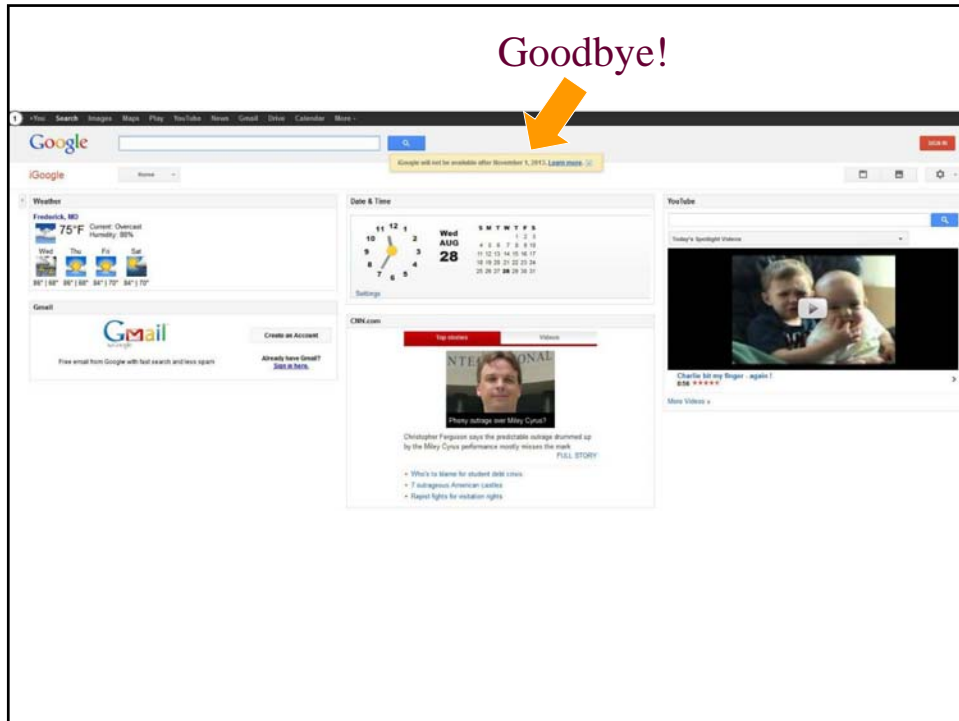
Stock Quotes

Symbol	Price	% Change
SHLD	18.167.92	-24.37 (12.20%)
SCOR	2.283.55	-8.11 (18.91%)
SPD	1.483.89	-1.22 (18.99%)

Data provided by
 Quotes by: Interactive Data Corp. Data as of 20 minutes
 Fixed data provided by: Morningstar, Inc. (©2010) All rights reserved.

Home

Goodbye!



Social Media Era

Cloud synced bookmarks



Great to Use at Work?

The screenshot shows a Facebook event page. At the top, the Facebook logo and search bar are visible. The event title is "My Friends Can Change The Color of Facebook!!!". The event is public and was created by Bill Amdbdjcbffa Sharpebergskymanzwitezuscensenstein. The event date is Friday, and the time is "What time?". The event description includes a special URL that can be found at the first comment. The event page features a "Write Post" section with a text input field. Below the event description, there are two posts from the event creator, Bill Amdbdjcbffa Sharpebergskymanzwitezuscensenstein, both dated "about an hour ago". The first post is titled "Change It Right Now- http://it5xa1xc1.tumblr.com/?974135114812" and includes a link to a Tumblr page. The second post is titled "My Friends Can Change The Color of Facebook!!! it5xa1xc1.tumblr.com". The right side of the page displays sponsored ads, including "Travel north and save.", "Bio-Fitness Club", "Signature Photography", and "Weight Loss Meal Delivery".

The screenshot shows a LinkedIn profile page for Charles Su. The profile is set to "View profile as: Yourself". The profile includes a header with the name "Charles Su" and a note that "58 have you in circles". The profile is divided into several sections: "About", "Posts", "Photos", "Videos", and "+1's". The "People" section is divided into "In your circles" (768) and "Have you in circles" (58). The "Work" section lists the following information: Occupation: Software Engineer; Skills: What are your skills?; Employment: Google, Software Engineer, 2010 - present, Frontend engineer on G+ Profiles. The "Story" section includes a tagline: "Foodie, Retired Professional Gamer, Programmer"; Introduction: "My idea of a good day?" with a list of activities: "Trying a dish I've never had before", "Experiencing the local flavor of a new place", "A round of golf with family and friends", and "Not having any plans"; Bragging rights: "Went to the Emmys and sat with the cast of Mad Men". The "Education" section lists: University of Texas at Austin, Computer Science, 2004; University of Southern California, Computer Science. The "Basic Information" section is partially visible at the bottom.

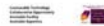
What's Next?



Content Objects

Contacts **Events**
Links **Jobs**
Articles **Emails**

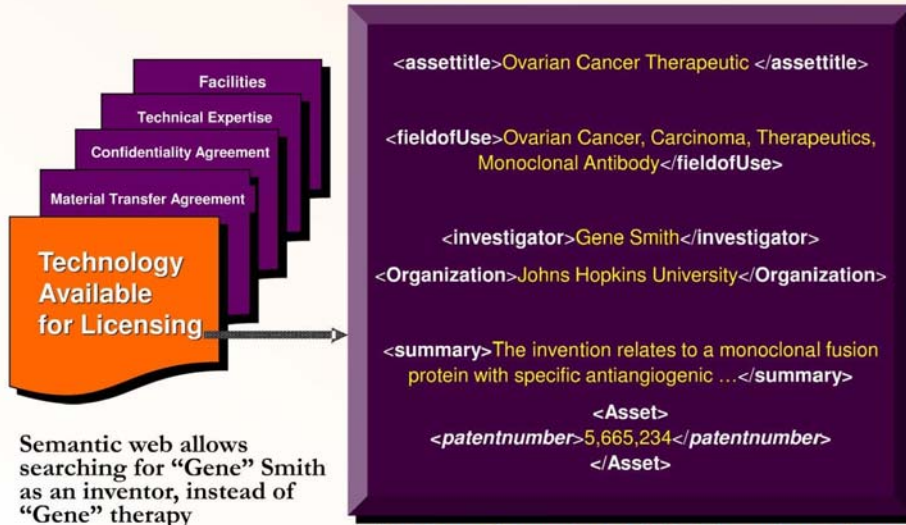
TT Objects



Technology Transfer Objects

1. Licensable Technology
2. Collaborative Opportunity
3. Available Facility
4. Available Expertise

XML Tags are Descriptive of Their Content, Enabling Semantic Search



Semantic web allows searching for “Gene” Smith as an inventor, instead of “Gene” therapy

Web Page Tagged with XML Licensing Schema

Object Characteristics

Title

Author(s)

Date created/updated

Yours

~~Content~~

Classifications

Media

Comments

Others

Ranking

How it was found

USUK Rolodex

Click to Select by State

SELECT BY LAST NAME
A B C D E F G H I J K L M N O P Q R S T U V W X Y Z

Has Resume? Has Picture? Is COO/Exec?

FILTER OR FIND BY

Category: [v]

Innovation:

First/Last Name: [v]

Abstract:

Keyword:

Zip Code:

Employer:

Distance from Me (miles):

TOOLBOX
[Events](#) - [Jobs](#) - [News](#) - [Blogs](#) - [Useful Sites](#) - [Reports](#)
[Social Knowledge Community](#)

[Mainland Geographic Portal Example](#)
[Topical Portal Example](#)

[Printable Version](#)

Name	Phone	Organization
Abdolkhan, Bahar	301-209-2000	Gene Biotechnology, Inc.
Alexandre, Leslie	301-209-2000	OncorMed, Inc.
Andra, Saraholt	410-209-2000	Becton Dickinson Primary Care Diagnostics
Benedek, Krysztina	301-209-2000	Shire Laboratories, Inc.
Berman, Michael	301-209-2000	Alpha T Biomedicals, Inc.
Beminger, Mark	301-209-2000	Genetic Therapy, Inc.
Bern, Lawrence	301-209-2000	Infacial Corporation
Bokum, F. J.	301-209-2000	SuperTech, Inc.
Buccianti, Edmund	301-209-2000	Advanced Biotechnology Concepts, Inc.
Burke, Patrick	301-209-2000	Indtech Biosystems International
Burns, James	301-209-2000	Gene Therapeutics, Inc.
Campbell, R. Nelson	301-209-2000	EntrelMed, Inc.
Carlson, Peter	410-209-2000	Oceana Biosciences Corporation
CHAZZA, Claudio	301-209-2000	Sigma-Tau Pharmaceuticals, Inc.
Chesnut, John	301-209-2000	Classion Immunotherapeutics, Inc.
Comstock, Jose	301-209-2000	Genetec, Inc.
D&S, Brian	301-209-2000	Genetec, Inc.
Dal, Trudy	301-209-2000	Bioplast, Inc.
De Ertes, Mark	301-209-2000	Scientific Hospital Supplies
Defries, Mark	301-209-2000	SHS North America
Deininger, Thomas	301-209-2000	Merck Biosciences Corporation
Falusi, Anurag	301-209-2000	CNA Technologies, Inc.
Felchman, Charles	301-209-2000	Digene Corporation
Folger, Doug	301-209-2000	ChemGen Corporation
Fournier, William	410-209-2000	Alpharma US - Pharmaceuticals Division, Inc.
Gao, Richard	301-209-2000	Neurostem Biopharmaceutical Sciences
Geisler, Mark	301-209-2000	Genetec, Inc.
Graham, Sol	301-209-2000	Quality Biologist, Inc.
Hoffman, Brian	301-209-2000	Cambridge Biotech Corporation
Hockmeyer, Wayne	301-209-2000	MedImmune Ventures, Inc.
Ike, P. Thomas	301-209-2000	Biological Research Faculty and Faculty, Inc.
James, Debbie	410-209-2000	Paragon Biotech, Inc.
Jenkins, John	410-209-2000	Deklar Bio Systems, Inc.
Kincaid, Randall	301-209-2000	Veritas, Inc.
Knight, Martha	301-209-2000	Paygate Technologies Corporation

PERSONAL DETAILS

Richard Delina

Title: CEO and Principal Company: New Economy Strategies, Inc.
Address: 1250 24th St NW, Suite 300 Washington, DC 20037
Phone: 202-209-2000
Web Link: www.new-econ.com

Background: In the economic development arena for over eighteen years at the national, regional, and local levels, Richard has been recognized for his work in public-private partnerships, regional business climate analysis, and technology adaptation by numerous business organizations... more

Education: BA, University of Texas at Austin

Colleagues: Yael Friedman, Barry Dabof, Kirstie Irtich, Michelle Lennihan, Vedant Koppera, Mary MacPherson, Steven Miller, Ethan Byler, Richard Bender, Steve Platten, Pita Crowe, Tom Marie Austin

Your Notes: Likes chocolate

[Print Business Card](#) [Print Bio Sheet](#)

[Add this person to your personal rolodex](#)
[Request to be added to this person's rolodex](#)

Privacy Statement for 71,113,240.83

Intranet Dashboard

Matilda Intranet

Navigation: Home | Network | Events | MTA | MTR | MTA/MTA | MTR | Home | News | Contact

News Feed:

- 10/10/2013 - 10/10/2013 - 10/10/2013 - 10/10/2013 - 10/10/2013
- 10/10/2013 - 10/10/2013 - 10/10/2013 - 10/10/2013 - 10/10/2013

Calendar:

Day	10/10/2013	10/11/2013	10/12/2013	10/13/2013	10/14/2013	10/15/2013
Event						

ORTA Staff Communications

Internal web site

- facilitates sharing content
- creates one stop location
- enhances use of standard forms
- expand to all ORTAs - LiveLink

Barry M. Dattol
September 2013

Deal Dashboard

MAKO Licensing Extranet

1. Registering users took too long
2. Poor GUI for editing home page content
3. Good Group/Discussion features

What if Our Contracts Were Crowd-Enabled?

Payment	Amount	Terms	Due	Other	Additional Terms (as described by the site on the preceding page)
License Execution Fee		Every year unless stated. Royalty to be in excess of Minimum Annual Royalty	30 days after issue date	Invited by Licensee	
Minimum Annual Royalty		Proportional to first year but not less than...	February 15th	Invited by Licensee	1
Development Costs	To be discussed	Percentage amount times Net Sales		Invited by Licensee	2
Patent Royalty		Percentage amount times Net Sales	45 days after milestone occurs	For each Licensed Technology	3
Milestone Payments		Sub-Milestone of Licensee according to Clause 15.1	45 days after Sub-Milestone completion	Invited by Licensee	
Patent Sub-investment	Ongoing	Proportional to Licensee's net income	45 days after each year	Invited by Licensee	
Patent Enforcement Expenses	As incurred	Proportional to Licensee's net income and credited royalties are recovered	February 15th of each year	Invited by Licensee	4
Patent Enforcement Proceeds	As incurred	Proportional to Licensee's net income and credited royalties are recovered	45 days after Licensee receives each income	Invited by Licensee	5
Contingency Sub-investment	2%	As defined in Clause 1.38	45 days after License Termination date	Invited by Licensee	
License Termination Fee	\$2,000.00	Triggered by Termination by Default of Licensee or Termination at OTT by Licensee	45 days after the later of the notification or the receipt of Third Party notice proceeds, and actually thereafter	Payment will be held in escrow until paid	6
Regulatory Voucher Proceeds					
Discounts & Demo Units					

Licensee CoP

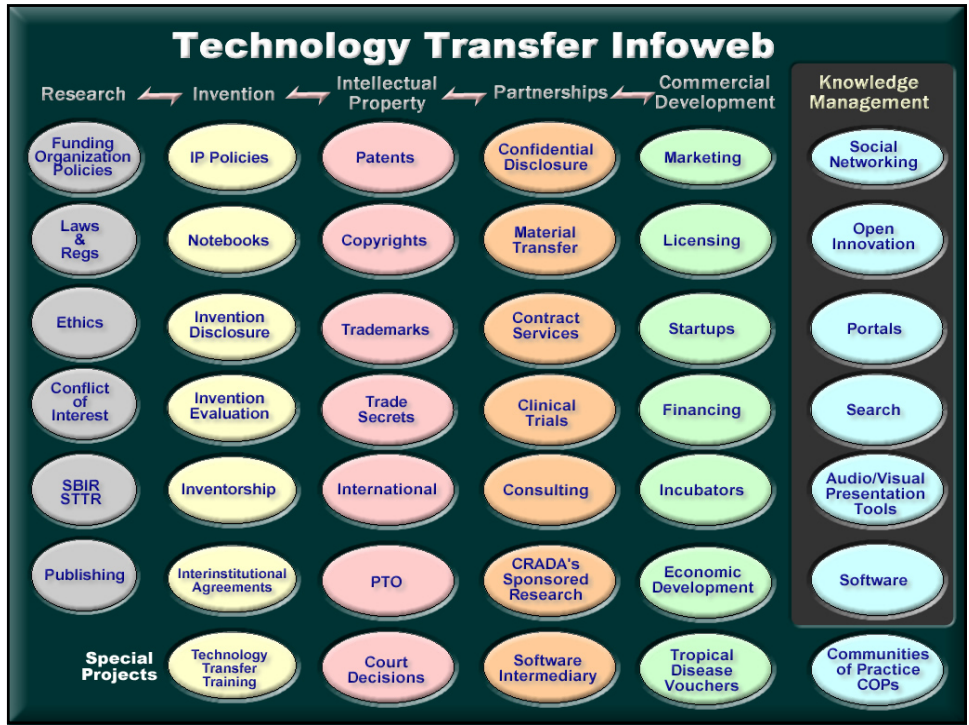
What is a CoP and Why Form It?

- A group of active practitioners across multiple organizations who share knowledge, contacts, data, tips, best practices, questions, and support for each other.
- Membership is restricted to those actually performing in the field of the CoP.
- CoPs share
 - Knowledge objects (e.g. white papers, ppts, templates, etc.)
 - Knowledge embedded within individuals (e.g. personal approach to a problem)
 - Knowledge embedded in a community (e.g. analyses of members' best practices)
- Benefits for technology development and commercialization
 - Disseminates Army inventions to broader audience
 - Enhances Army CoP member's role in the medical community
 - Supports Army licensee's commercialization efforts
 - Increases royalty revenue back to Army from increased sales by Licensee
 - Provides ability for Army to compare its practices and results with outside organizations
 - Provides forum for Medical Technology Transfer licensing personnel to seek input, leads, etc.

Ideally you belong to multiple CoPs
but use single, aggregating dashboard

CoP Details and Implementation

- PIA/GOCO/Contractor
 - Create backbone & infrastructure for multiple CoPs to use
 - Oversee knowledge workers who hunt, gather, repurpose content
- CRADA/Collaborative Agreement/Other to establish
- Commercial Licensee of Army IP can sponsor CoP
 - Annual fee of \$___K
 - Benefits to Licensee
 - Sponsor logo appears on web site banner
 - Access to data, membership lists, forums
 - Controlled communications: monthly notices/annual solicitation
 - Split of subscriber fees and advertising revenue
- Training Data
 - Build into all CoPs with web-based training
 - Anonymize data and provide real-time analysis
 - Business rule-based triggers with dashboard can flag problems



Why Tablets

- Greater touch
- Instant boot
- Push notifications
- Touch interface
- Socially acceptable use during meetings
- Augmented reality (future)
- Big enough to read/watch video

Matilda Next Steps Needed

- 1. Start grass roots community of practitioners**
- 2. Create Object Models of Technology Transfer**
- 3. Obtain FLC/AUTM/LES support of Object Model**

Matilda Dashboard Buildout

1. Obtain grant or investment for hosting/coding
2. Port code to ecommerce platform
3. Populate with enough objects to be useful daily
4. Syndicate feeding objects in/out of affiliated sites
5. Market, market, market

If interested

Email

Matilda@Datlof.com



Contact
Information



Barry Datlof

301-619-0033

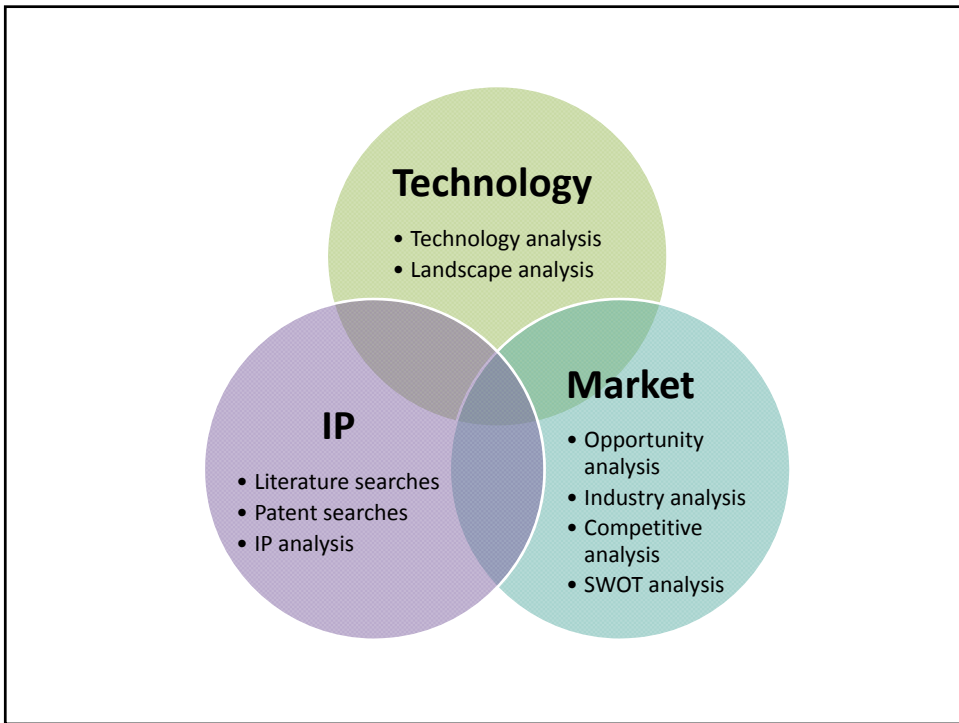
barry.m.datlof.civ@mail.mil

Dashboard for understanding an invention portfolio

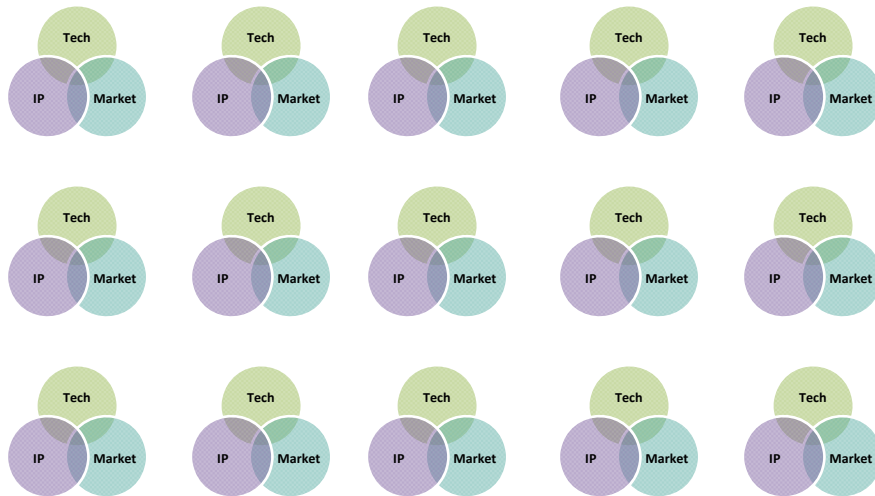
Michael Manion BSc(Hons) PhD MBA GAICD
CEO, Invention Evaluator

Title here

The following presentation reflects the personal views and thoughts of Michael Manion, and is not to be construed as representing in any way the corporate views or advice of the Invention Evaluator and their Affiliates, Subsidiaries or Divisions, nor the views or advice of the Association of University Technology Managers (AUTM). The content is solely for purposes of discussion and illustration, and is not to be considered legal advice.



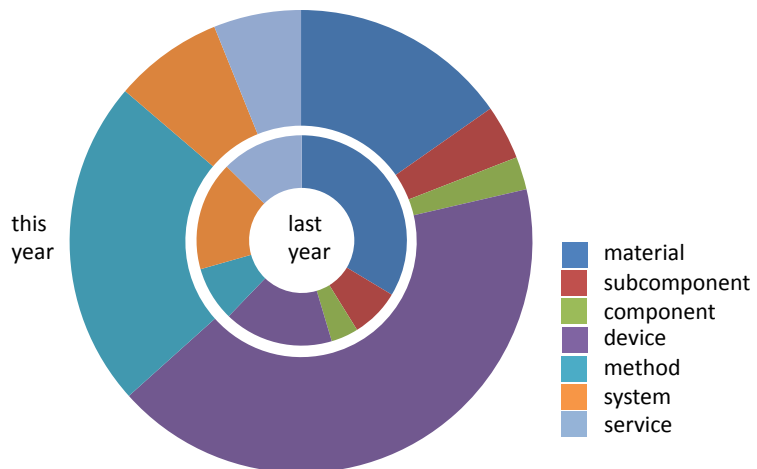
What can this information tell you across your portfolio?



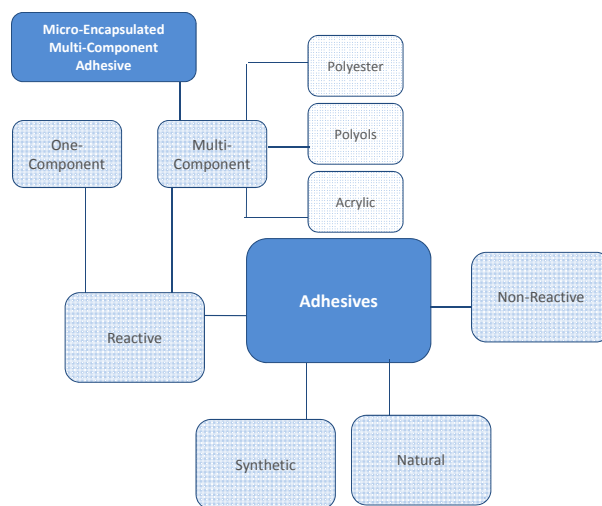
Invention Type: Individual



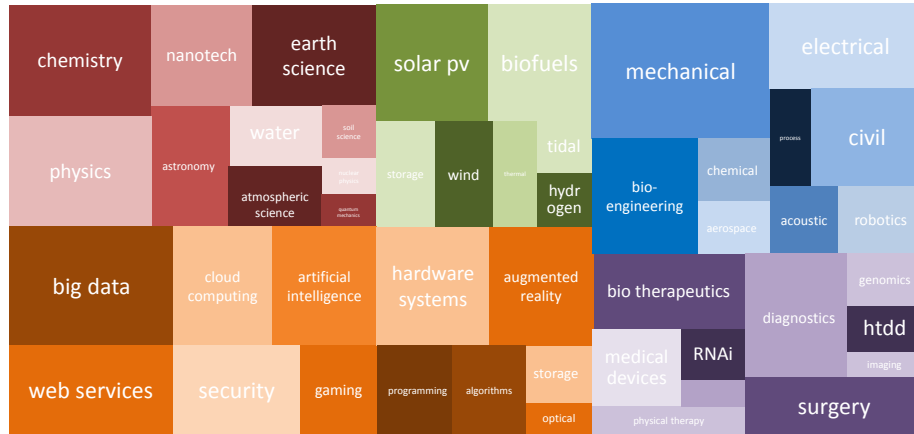
Invention Types: Portfolio



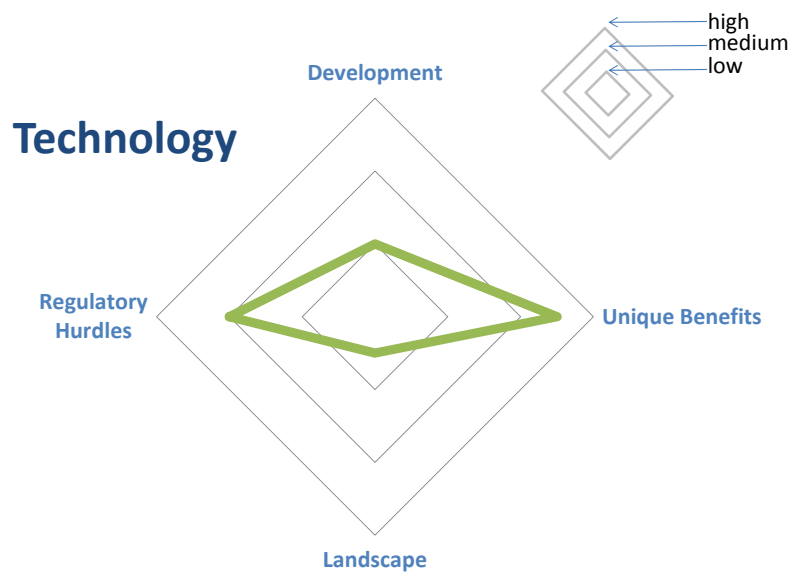
Invention Landscape: Individual



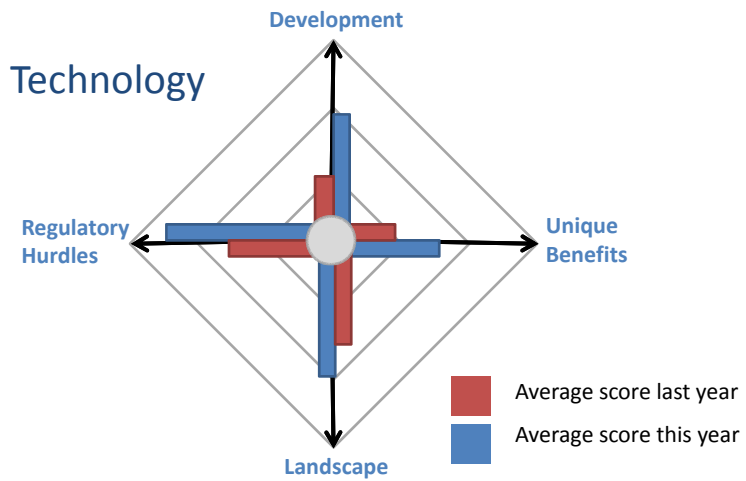
Invention Landscape: Portfolio



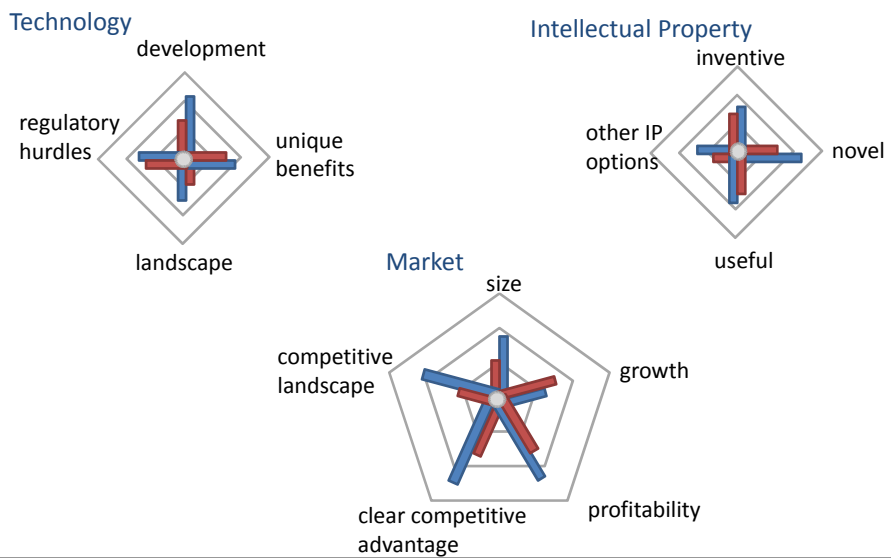
Invention Quality: Individual



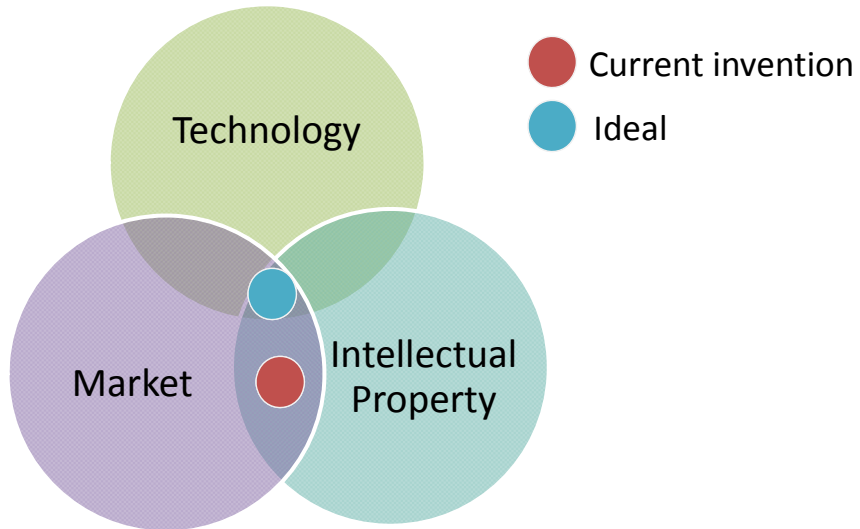
Disclosure quality: Portfolio



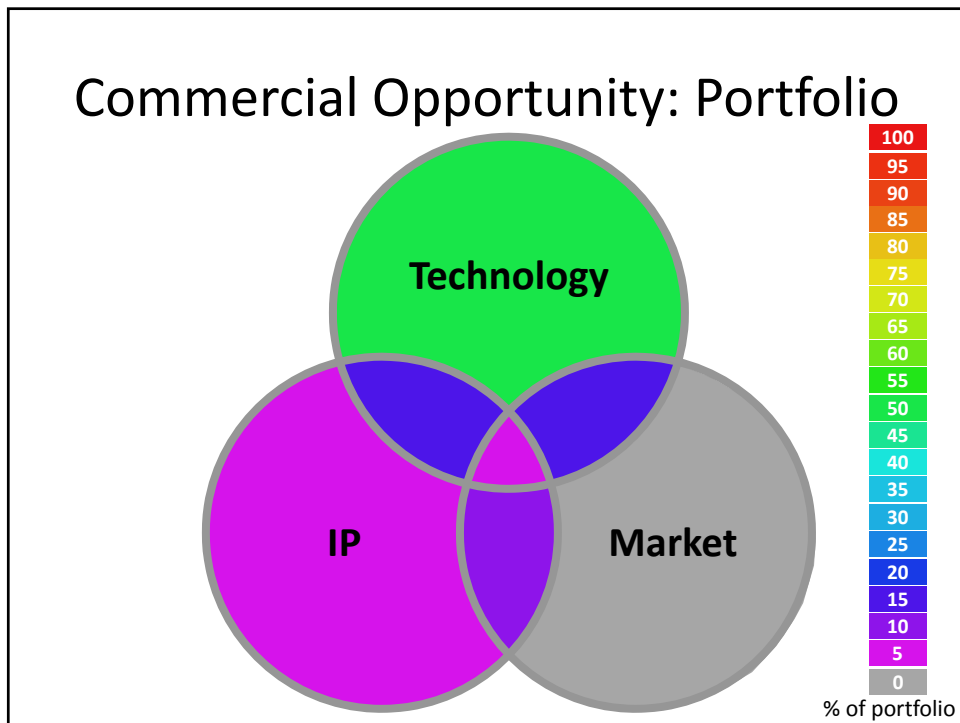
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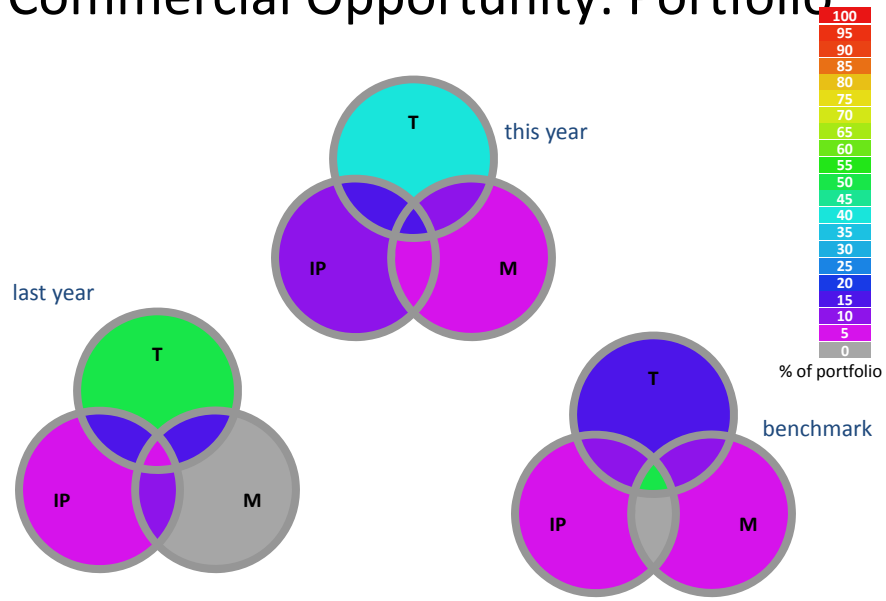
Commercial Opportunity: Individual



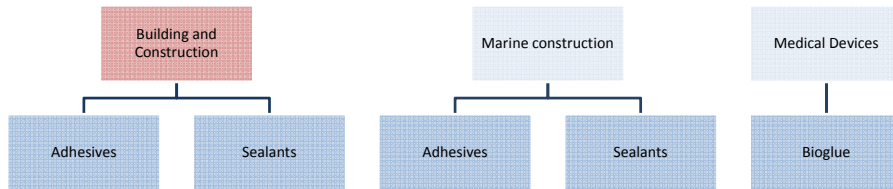
Commercial Opportunity: Portfolio



Commercial Opportunity: Portfolio



Invention Industry Relevance: Individual



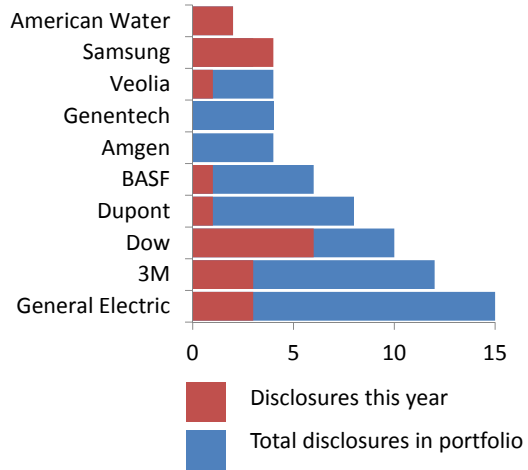
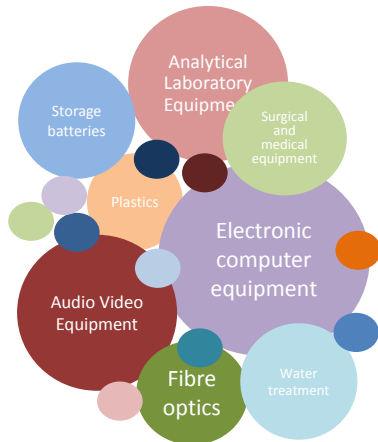
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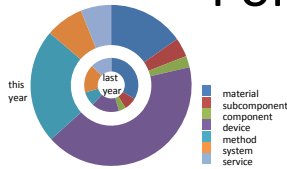
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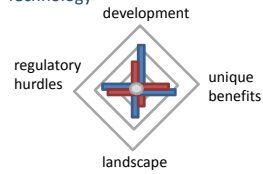
Disclosure industry relevance: Portfolio



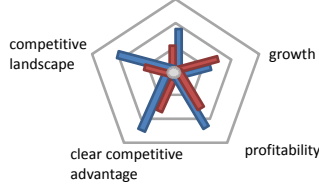
Portfolio dashboard



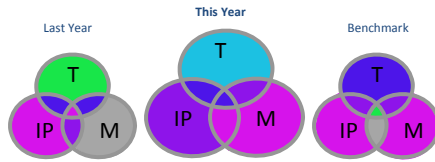
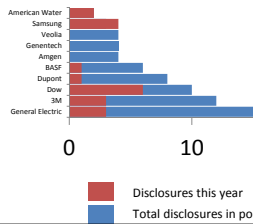
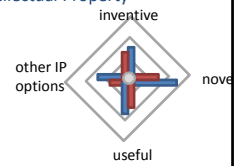
Technology



Market



Intellectual Property



Disclosures this year
Total disclosures in portfolio

inventionevaluator
objective idea analysis

InventionEvaluator.com

michael.manion@inventionevaluator.com

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Dashboards for Technology Transfer using Analytics for Inteum®

- **Dave Waddell CITP MBCS**

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Background

- Analytics developed in the commercialization office of the University of Edinburgh.
- Start-up company formed 2009.
- Partnered with Inteum Company LLC.
- Around 150 institutions across the world using Dashboards and Reporting.
- A tool for the ‘front line’.

Why Use A Dashboard?

- Instant information, centralized access.
- High level summaries and detailed reporting.
- Create once, use anytime...always up to date.
- Encourage sharing & collaboration.
- Self service & mobility (tablets e.g. iPad®).
- **Data > information > intelligence.**

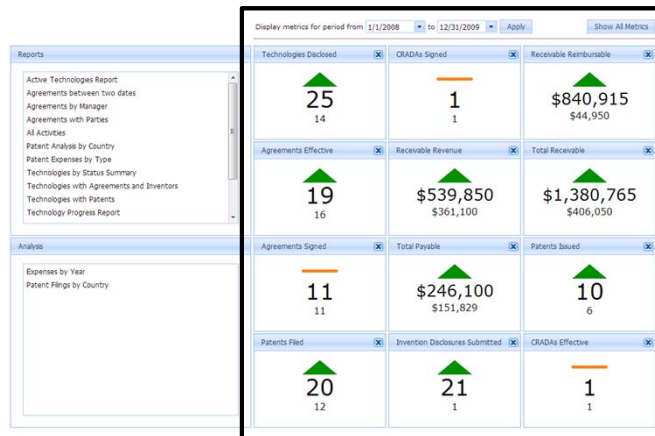
77

Differing Perspectives

- Directors and Managers
 - Summary
 - Progress
 - Performance
- Other staff
 - Information on 'My' cases/activity
 - Detailed reporting 'up the chain' or 'departments'

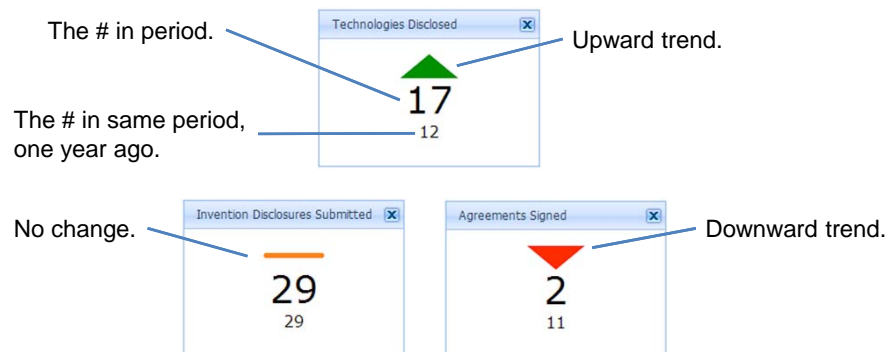
78

Summary Performance & Progress



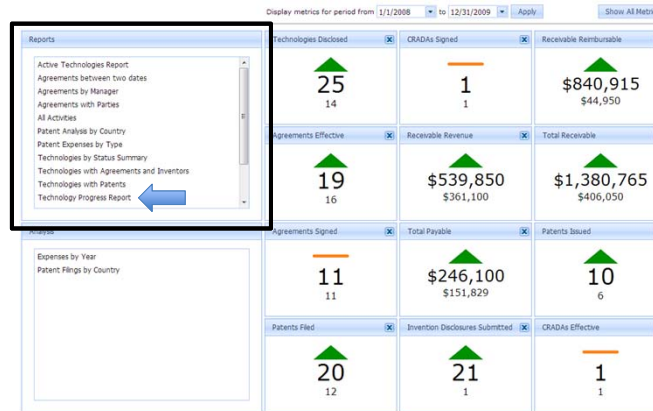
79

Anatomy of a Dashboard Metric



80

Detailed Reporting

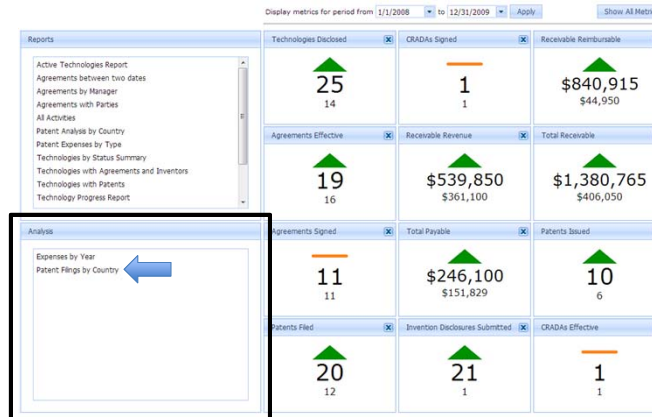


81

How are 'my' cases progressing?

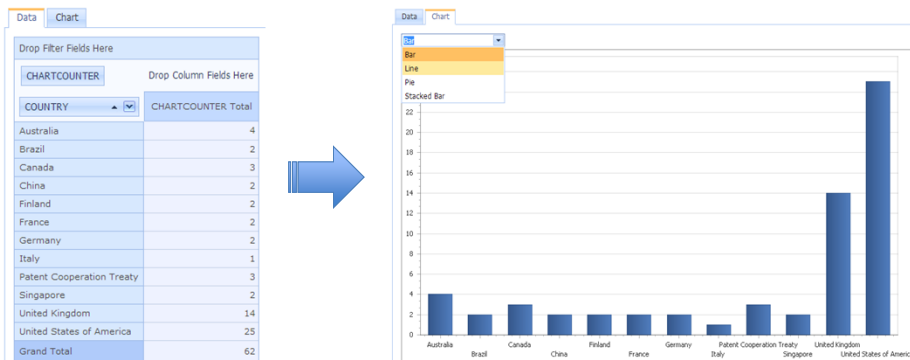


Detailed Graphical Analysis



83

Which countries have we filed in?



Roundup

- Different people...
- Different roles...
- Different needs...
- Different tools...
- =FLEXIBILITY
- **Data -> Information -> Intelligence**

85

Questions? Comments?



Discussion and Q&A

Click the raise hand button.

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Press * 6 to re-mute your phone.

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Financial Conflicts of Interest

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Need to Know Basics of Technology Transfer for Support Staff

Negotiation of License Agreements

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