



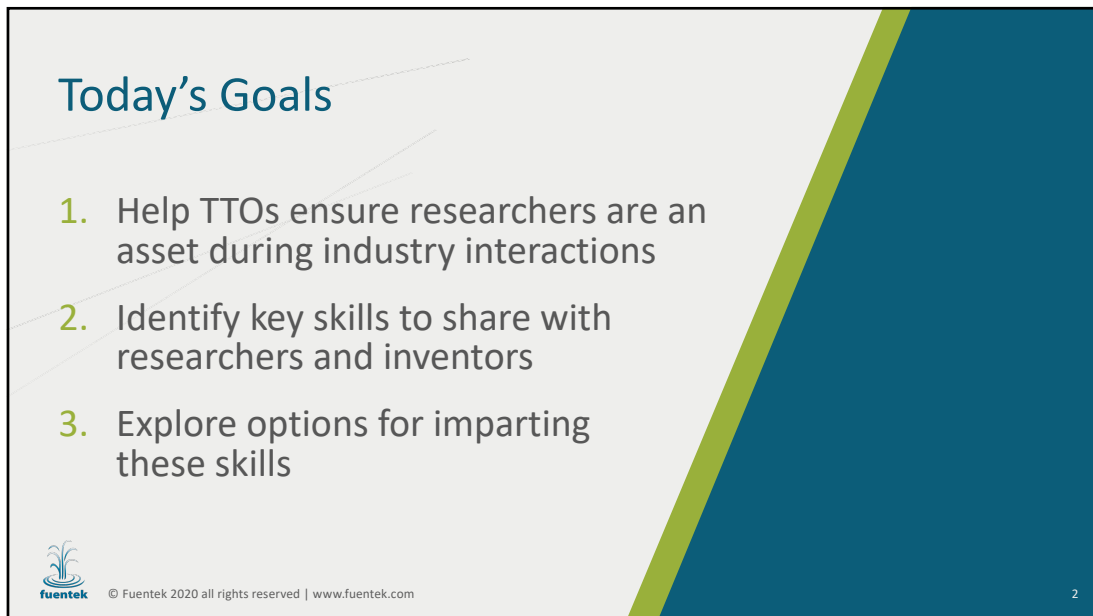

**BE A PITCHING COACH:
HELPING RESEARCHERS COMMUNICATE
THEIR TECHNOLOGY EFFECTIVELY**

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Today's Goals

1. Help TTOs ensure researchers are an asset during industry interactions
2. Identify key skills to share with researchers and inventors
3. Explore options for imparting these skills


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Introductions



Danielle McCulloch, Vice President
Leads major tech transfer projects at leading universities and government agencies

Extensive experience in enhancing an organization's presence and reach through effective communication strategies

15 years as a chemical engineer and product manager in the medical device and paper manufacturing industries

MBA (Dartmouth College), BS in chemical engineering (Washington University)

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Introductions

Becky Stoughton, Vice President
Leads projects and engagements at university, government, and corporate clients

Former director of the Office of Technology Commercialization at the University of Texas at Dallas

Entrepreneur; engineering manager

MBA (University of Texas at Dallas), BS in mechanical engineering and engineering/public policy (Carnegie Mellon University)

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Fuentek




INTELLECTUAL PROPERTY MANAGEMENT

Make and implement well-informed, market-based decisions about patenting, marketing, and licensing the IP portfolio.




MARKETING & COMMUNICATIONS

Raise the profile of the IP portfolio and your office, successfully securing stakeholder support and boosting researcher participation.



STRATEGIC SOLUTIONS

Increase your efficiency and enhance your effectiveness both inside your institution and in the broader innovation ecosystem.




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Covering the Tech Transfer Lifecycle


Fuentek offers services to support your organization wherever you need it



Investments & Inventions

Keep the pipeline filled with technologies poised for success in the market.


- Researcher Relations
- Industry-University Relations
- Entrepreneurial Ecosystems
- Competitive Analysis



Triage

Make strategic decisions for individual inventions and the entire portfolio.


- Patenting Decisions
- IP Portfolio Management



Marketing

Develop and implement strategies to take technologies from lab to market.


- Market Validation
- Marketing Strategies
- Identify, Contact, Vet Prospects
- Marketing Materials
- Briefings and Webinars
- Social Media
- Websites



Doing Deals

Secure win-win agreements that align with your goals for the technology.


- Due Diligence
- Deal Structure, Scope, Terms
- Negotiation
- Valuation
- Sponsored Research
- Launching Startups



Celebrating Success

Get the recognition you need — and deserve — for your successes.

- Success Stories
- Awards
- Reports
- Presentations




Operations

Where things stand, where you want to go, and how to get there.

- Structure
- SOPs & Policies
- Benchmarking & Metrics

- Reporting to Management
- Strategic Planning
- Communications

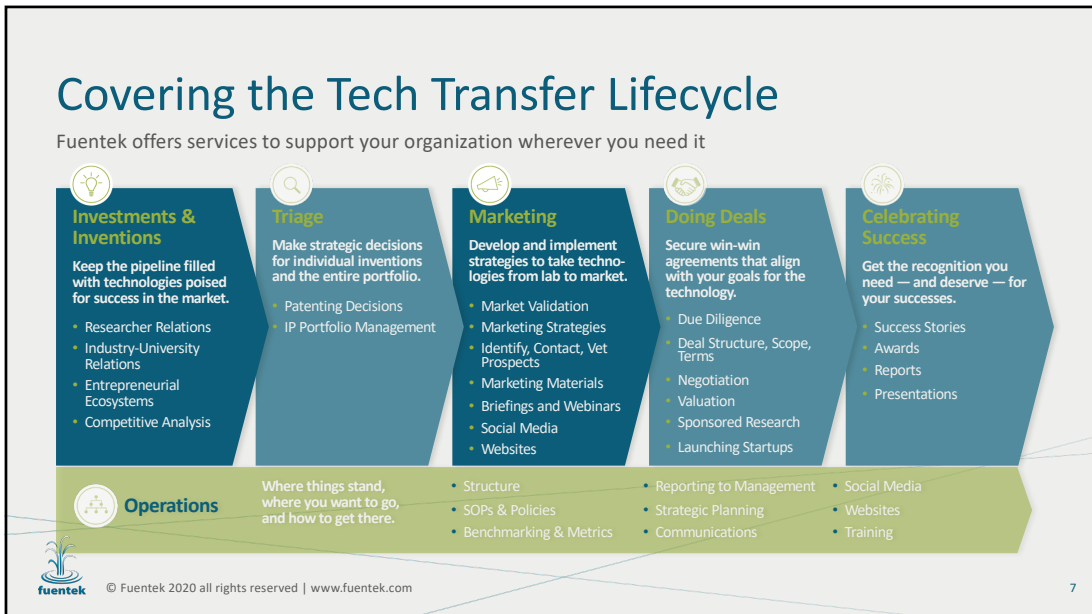
- Social Media
- Websites
- Training



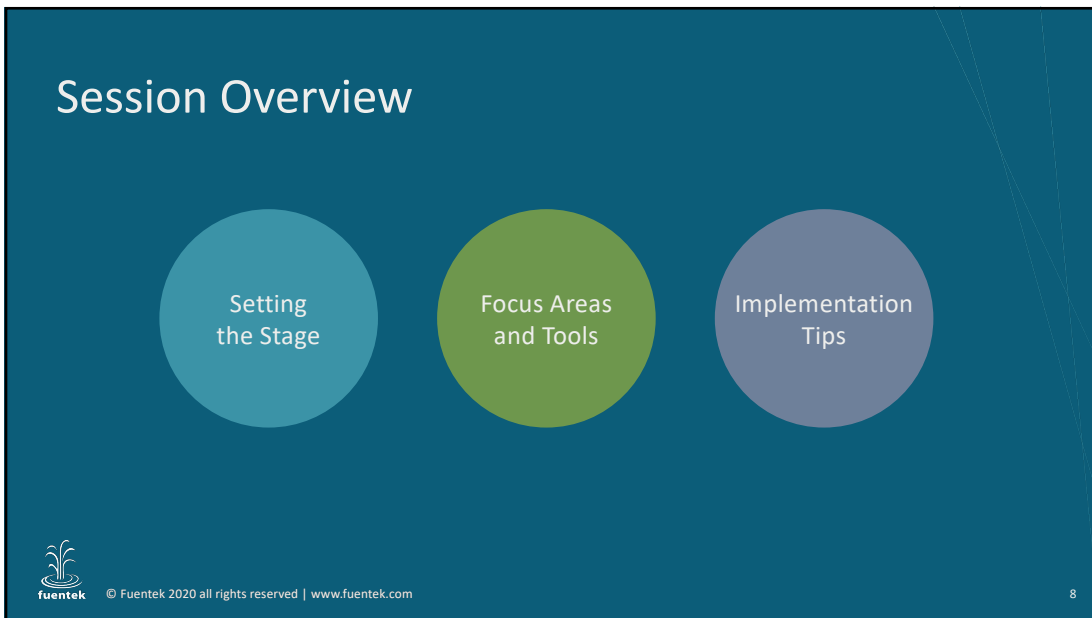
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Session Overview

Setting the Stage

Focus Areas and Tools

Implementation Tips

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SETTING THE STAGE

No Ask Acme Co.

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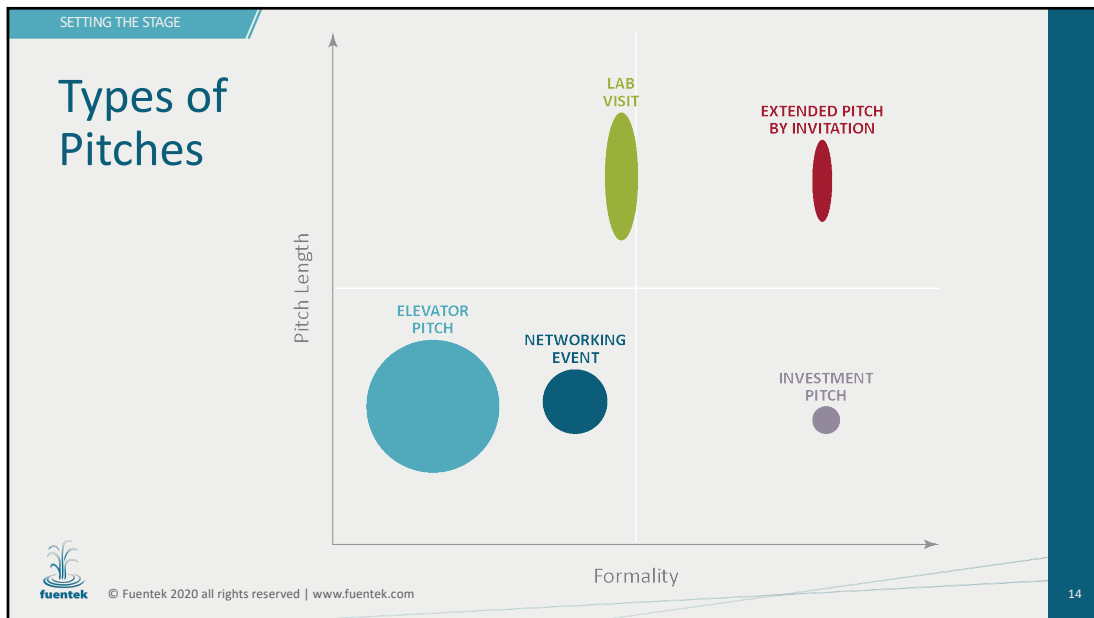
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SETTING THE STAGE

Potential Pitfalls of Innovator Involvement



- Dominating the conversation
- Sitting mute
- Overlooking opportunities
- Getting defensive
- Focusing on minutiae
- Delivering the wrong message
- Revealing proprietary details
- Talking to the wrong person

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SETTING THE STAGE

Benefits of Proactive Training for Innovators

OPTIMIZE available time and energy from TTO	BUILD relationships with researchers	REDUCE researcher frustration	ENABLE innovators to spot and capitalize on serendipity	ACHIEVE better deals!
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Session Overview

The diagram consists of three circles arranged horizontally. The first circle is teal and labeled 'Setting the Stage'. The second circle is green with a yellow border and labeled 'Focus Areas and Tools'. The third circle is blue and labeled 'Implementation Tips'.

Setting the Stage

Focus Areas and Tools

Implementation Tips

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FOCUS AREAS AND TOOLS

Help Innovators Overcome Their Shortcomings

A grid of six colored boxes, each with a title and an icon. The boxes are arranged in two rows of three. The first row contains: 'Understanding the commercialization process' (teal, wrench icon), 'Standing in a potential partner's shoes' (green, shoe icon), and 'Expanding applications' (red, building icon). The second row contains: 'Creating value-based benefits' (purple, tools icon), 'Moving forward while protecting IP' (dark blue, shield icon), and 'Leveraging industry feedback' (light blue, gear icon).

Understanding the commercialization process

Standing in a potential partner's shoes

Expanding applications

Creating value-based benefits

Moving forward while protecting IP

Leveraging industry feedback

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FOCUS AREAS AND TOOLS

Understanding the Commercialization Process

Innovators do not understand the complexity of the process

- So many steps!
- So many people are involved!
- The timeline is so long!

Benefits of coaching

- Increased innovator patience
- More appropriate innovator actions
- Improved flexibility

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FOCUS AREAS AND TOOLS

Road to Tech Transfer

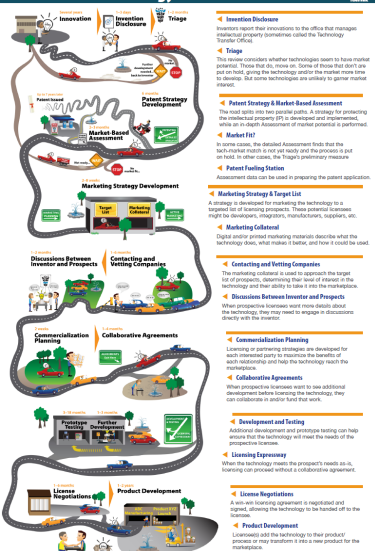
Free to use

- In presentations
- On your website
- As a handout

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The Road to Technology Transfer



- Innovation Disclosure**
Innovators report their innovations to the office that manages intellectual property's commercial aspect: the technology transfer office.
- Triage**
The review considers whether technologies qualify to have market potential. Those that do receive a "green" flag that allows them to move forward. Those that do not receive a "red" flag that means they are to be shelved. But some technologies are unclear to garner market interest.
- Patent Strategy & Market Based Assessment**
The road splits into two parallel paths. A strategy for protecting the intellectual property (IP) is developed and implemented, while an in-depth Assessment of market potential is performed.
- Marketfit**
In some cases, the detailed Assessment finds that the technological merit is not yet ready and the process is put on hold. In other cases, the Triage's preliminary measure.
- Patent Filing Notice**
Assessment data can be used in preparing the patent application.
- Marketing Strategy & Target List**
A strategy is developed for marketing the technology to a targeted audience: investors, manufacturers, hospitals, etc.
- Marketing Collateral**
Digital and/or printed marketing materials describe what the technology does, what makes it better, and how it could be used.
- Connecting and Setting Context**
The marketing collateral is used to approach the target list of companies, identifying their level of interest in the technology and their ability to take it into the marketplace.
- Discussions Between Investor and Prospects**
When prospective business want more details about the technology, they may need to engage in discussions directly with the inventor.
- Commercialization Planning**
Licensing or partnering strategies are developed for each interested party to maximize the benefits of each technology and help the technology reach the marketplace.
- Collaborative Agreements**
When prospective business want to see additional development details regarding the technology, they can collaborate in a non-exclusive license.
- Development and Testing**
Additional development and prototype testing can help assess if the technology will meet the needs of the prospective users.
- Licensing Agreements**
When the technology meets the prospect's needs an intellectual property process and a collaborative agreement.
- License Negotiations**
A non-exclusive agreement is negotiated and signed, allowing the technology to be licensed off to the licensee.
- Product Development**
Licensees take the technology to their product process or they transform it into a new product for the marketplace.

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FOCUS AREAS AND TOOLS



Standing in a Potential Partner's Shoes

Innovators must consider who they are speaking to and why



Audience

Identify target audience

Message

Refine core message to match audience

Mechanism

Select best tool for conveying message to audience

Outcome


Determine CALL TO ACTION and metrics for assessing success

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FOCUS AREAS AND TOOLS



**Worksheet
for
Distribution**

Use AMMO to Hone Your "Pitch" *
(It's all about *them*.)



Audience
Identify target audience

Message
Refine core message to match audience

Mechanism
Select best tool for conveying message to audience

Outcome
Determine CALL TO ACTION and metrics for assessing success

Audience
"Who" is my audience for this "pitch"? What are they looking for...what matters to them? What is the appropriate "tone" for communicating with them effectively?


Message
What are the core message(s) I want my audience to receive with this "pitch"? How do I convey it to my audience in a way that will most resonate with them?

Mechanism
What "channel(s)" is best suited to reach my audience most effectively? (Possibilities include informal conversations, formal presentations, email, formal research posters, etc.)

Outcome
What do I want to achieve with this particular communication initiative to this audience? What outcome would be considered successful? What specifically do I need to ask my audience...what do I want them to do?

* The AMMO concept is quite versatile and can be useful when applied to any communications with any audience.


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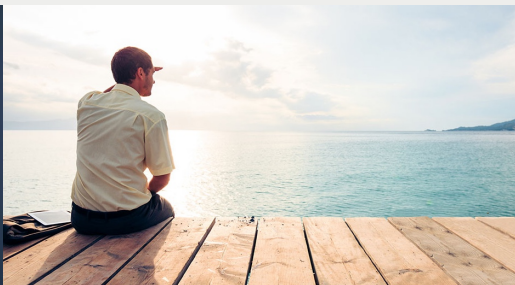

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FOCUS AREAS AND TOOLS



Expanding Applications

- Encourage innovators to focus on their **problem**
 - What problem were they trying to solve?
 - Who else might have a similar type of problem?
- Commercial application might be drastically different that the original application



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FOCUS AREAS AND TOOLS

UNEXPECTED APPLICATIONS

Beauty and the Display



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FOCUS AREAS AND TOOLS

UNEXPECTED APPLICATIONS

An Almost Seamless Encounter



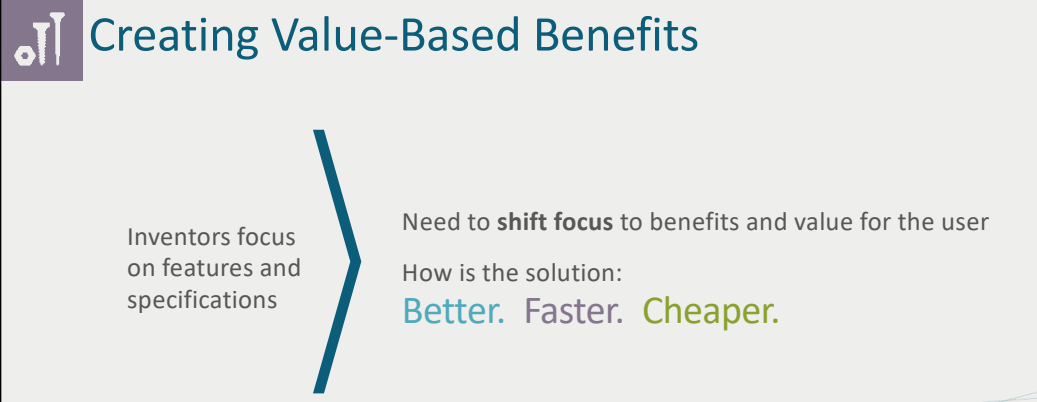
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FOCUS AREAS AND TOOLS


Creating Value-Based Benefits



Inventors focus on features and specifications

Need to **shift focus** to benefits and value for the user

How is the solution:
Better. Faster. Cheaper.

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FOCUS AREAS AND TOOLS

How to Express Features as Benefits

Feature	Benefit
Absorbs less than 1% of water	Absorbs less than 1% of water, providing an effective moisture barrier
Unlike conventional systems, ours uses optical fibers	Uses flexible optical fibers, eliminating many metal parts of conventional systems, resulting in smaller, lighter, less costly systems
Uses C++ code base and map formats	Affordable and accessible: Offers industry standard C++ code base and map formats, enabling implementation on existing systems

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FOCUS AREAS AND TOOLS

Potential Benefits Examples

Faster Powerful chip produces test results in half the time of other systems	More accurate Improved optics provide 10% better sensitivity than conventional tools	Improved reliability Uses fewer hardware components, reducing the risk of failure
Smaller Technology is 25% smaller than similar systems, enabling use in more products	Less expensive Uses off-the-shelf parts, decreasing overall system cost	Safer Open flame is not required, providing improved safety over similar solutions

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FOCUS AREAS AND TOOLS

Moving Forward While Protecting IP

- 1 File an invention disclosure first
- 2 Discuss invention appropriately
- 3 Obtain an NDA

It works like this... = DANGEROUS

This is what it can do... = SAFER

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FOCUS AREAS AND TOOLS

Format 1: The Value Proposition

Our product/service is _____
A NOUN OR SHORT PHRASE

for _____ who are
POTENTIAL APPLICATIONS/USERS

dissatisfied with _____. It
THE CURRENT MARKET ALTERNATIVE
THAT ADDRESSES THE SAME PAIN POINT

provides _____.
POTENTIAL BENEFITS


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FOCUS AREAS AND TOOLS

Value Proposition Example

Our innovation is a *method* for *joining the two halves of a plastic casing* for users who are dissatisfied with *unsightly seams caused by conventional manufacturing techniques*. This method provides *a more attractive end-product with lower manufacturing costs*.



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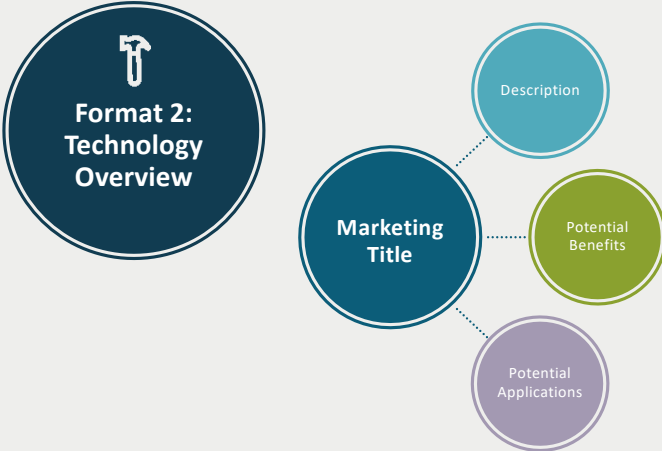
Courtesy of Geoffrey C. Moore in "Crossing the Chasm"

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FOCUS AREAS AND TOOLS

Format 2: Technology Overview



- Be clear and concise
- Focus on *what* it does, *not* how it works
- Focus on innovative aspects
- Benefits not features
- End uses beyond original concept
- Think broadly
- Compelling summary
- What it is and key benefit



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FOCUS AREAS AND TOOLS

Technology Overview Example


This technology is a method for seamlessly joining two halves of a plastic casing. This method uses a high-impact process to very rapidly bring the two parts together, resulting in a joint that is not visible. The technology can be used with a variety of shapes and types of plastic, and the simplicity of the process has the potential to streamline manufacturing.

Potential benefits

- **Attractive** – resulting parts have no seam
- **Versatile** – suitable for many polymers or shapes
- **Simple** – method reduces the number of steps in manufacturing
- **Low-cost** – process is less expensive than current methods

Potential applications

- Industrial sensors
- Waterproof casings
- Consumer electronics
- Toys



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FOCUS AREAS AND TOOLS

Leveraging Industry Feedback



- Considering external feedback is essential for:
 - Ensuring innovations are used by others
 - Securing collaborations
- Critical feedback can be a tough pill to swallow
- Encourage a strategic approach




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FOCUS AREAS AND TOOLS

Tools for Transformation

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Session Overview

Setting the Stage

Focus Areas and Tools

Implementation Tips

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IMPLEMENTATION TIPS

Engaging with Innovators

FORMAL TRAINING SESSIONS



1-ON-1 COACHING



ON-DEMAND CONTENT ONLINE



AD HOC INTERACTIONS



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IMPLEMENTATION TIPS

Reinforcing What You've Shared

Keep in touch with innovators

Provide self-service resources innovators can access on demand

Offer opportunities for practice and feedback

Share success stories

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IMPLEMENTATION TIPS

Tools to Improve Pitching Skills

The Road to Technology Transfer

Use AMMO to Hone Your "Pitch"
It's all about them!

Our product/service is _____ A NOUN OR SHORT PHRASE
for _____ POTENTIAL APPLICATIONS who are
dissatisfied with _____ THE CURRENT MARKET ALTERNATIVE THAT ADDRESSES THE SAME PAIN POINT
It provides _____ POTENTIAL BENEFITS

Marketing Title

- Description
- Potential Benefits
- Potential Applications

- Compelling summary
- What it is and key benefit
- Be clear and concise, not how it works
- Focus on what it does, not how it works
- Focus on innovative aspects
- Benefits not features
- End uses beyond original concept
- Think broadly

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TECH TRANSFER CONSULTANCY

STRATEGIC SOLUTIONS

MORE ABOUT FUENTEK'S STRATEGIC SOLUTIONS SERVICES

Coaching Innovators on Technology Communication

During our AUTM session, Fuentek provided these tools to help technology transfer offices (TTOs) give researchers skills and insights for pitching their technologies to prospective licensees/partners. Contact us today to discuss how Fuentek can help your TTO engage effectively with researchers as well as achieve other technology transfer goals.

DOWNLOADABLE FILES

BE A PITCHING COACH
Helping Researchers Communicate Their Technology Effectively

AUTM Presentation
Be a Pitching Coach - helping Researchers Communicate Their Technology Effectively

[Download](#)

Road to Tech Transfer & AMMO
Handouts

Audience, Message, Mechanism, Outcome

[Download](#)

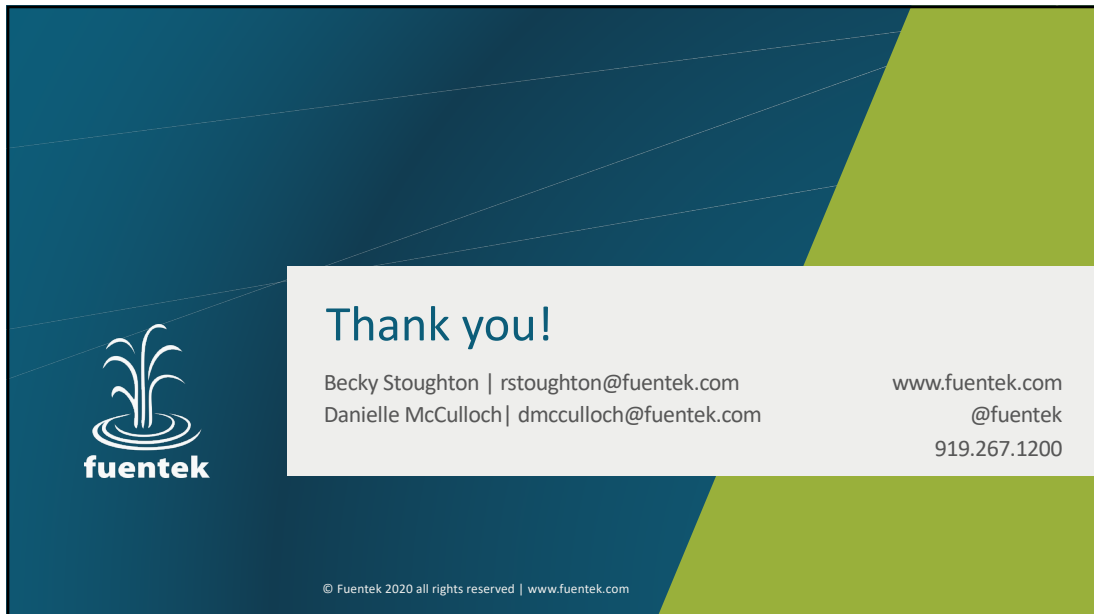
Use AMMO to hone your "Pitch"
(It's all about them)

AMMO Worksheet for Innovators

[Download](#)

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Fuentek's Experience




WE'VE CONDUCTED
16,000+
MARKET RESEARCH
INTERVIEWS




WE'VE WORKED WITH
3,500+
TECHNOLOGIES




WE'VE WRITTEN
900+
TECHNOLOGY
LISTINGS



WE'VE FACILITATED
500+
TECH TRANSFER
AGREEMENTS



WE'VE PREPARED
80+
WINNING AWARD
NOMINATIONS



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The Fuentek Team's Expertise and Acumen

Technical expertise

- Acoustics/Fluid dynamics
- Chemistry & chemical engineering
- Computer hardware & software
- Data processing/analysis
- Design automation
- Electrical engineering
- Energy/Power systems
- Image/Signal processing
- Instrumentation
- Information technology
- Life sciences
- Materials science
- Mechanical engineering
- Molecular biology
- Nanotechnology
- Nuclear engineering
- Optics/Photonics
- Physics
- Process/Systems engineering
- Propulsion
- Remote sensing
- Robotics
- Semiconductors
- Sensors

Industry acumen

- Aerospace/Aeronautics
- Agriculture
- Automotive
- Biotechnology
- Chemicals
- Communications
- Defense
- Electronics
- Energy, including nuclear & renewables
- Environmental
- Manufacturing
- Medical devices, diagnostics, equipment, & imaging
- Pharmaceuticals
- Product development/management
- Refrigeration/Climate control
- Supply chain management
- Telecommunications & networking
- Transportation
- Veterinary
- Web and Internet



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