

TRANSPARENCIES FOR UNIT 15

**CLASSIFYING,
EVALUATING
AND MANAGING
TECHNOLOGIES
FOR TRANSFER**

OVERVIEW

- The Elements of Technology Management
- Attributes of a Technology Management System
- Users and Beneficiaries of a Technology Management System
- Soliciting and Identifying Candidates
- Classification
- Evaluation
- Transfer Strategy
- Implementation: File Cabinet or Floppy



ELEMENTS OF TECHNOLOGY MANAGEMENT

- ◆ Awareness and Identification
- ◆ Classification and Evaluation
- ◆ Transfer Strategies
- ◆ Protection
- ◆ Markets and Marketing



ATTRIBUTES OF A TECHNOLOGY PORTFOLIO MANAGEMENT SYSTEM

- ◆ INVENTORY
- ◆ CLASSIFICATION
- ◆ MARKETING
 - ◆ Reports of Contact
 - ◆ "Needs" Information
- ◆ TRACKING
 - ◆ Status
 - ◆ Current Activity
 - ◆ Time and Event Flags
- ◆ CULLING
- ◆ FINANCIAL MANAGEMENT
 - ◆ Costs
 - ◆ Value
- ◆ INTERACTION WITH RELATED SYSTEMS
- ◆ VERSATILITY
 - ◆ Uses
 - ◆ User Groups



USERS AND BENEFICIARIES OF A TPMS

- ◆ ORTA, or Other Technology Manager
- ◆ Laboratory Management
- ◆ Agency Management
- ◆ Other Federal Laboratories
- ◆ Marketing Manager or Consultant
- ◆ Seekers of Technology
- ◆ Inventors/Identifiers



SOLICITING AND IDENTIFYING CANDIDATE TECHNOLOGIES

- ◆ Technology Portfolio Doesn't Just "Happen"
- ◆ Disclosures
 - ◇ Invention (Traditional)
 - ◇ Application Awareness
- ◆ Formal Searches
 - ◇ Internally Initiated
 - ◇ Externally Initiated
- ◆ Evaluation Process
 - ◇ New Applications
 - ◇ Related Technologies
- ◆ Patent Files
- ◆ Project Reports



CLASSIFYING TECHNOLOGY

- ◊ WHY CLASSIFY?
 - ◊ Describe
 - ◊ Evaluate
 - ◊ Manage
 - ◊ Market

- ◊ SELECTION OF ATTRIBUTES
 - ◊ Number
 - ◊ Importance
 - ◊ Commonality

- ◊ LABORATORY RELEVANCE

- ◊ MARKET RELEVANCE

- ◊ FLEXIBILITY



EVALUATING TECHNOLOGY

- ❖ **Context in the Innovation Process**
- ❖ **Market Perspective**
- ❖ **Applications**
 - ❖ **Product or Service**
 - ❖ **Ultimate User Group**
 - ❖ **Probable Delivery Sector**
 - ❖ **Candidate Transferees**
- ❖ **Quick and Dirty Questions**
 - ❖ **Quantification and Description**
 - ❖ **Development Status**
 - ❖ **Protection Status**
 - ❖ **Novelty**
 - ❖ **Value**
 - ◆ **Market Pull**
 - ◆ **Market Test**
 - ◆ **Third Party Assessments**
 - ◆ **Internal Assessment**
- ❖ **Remember Your Competition**



TRANSFER STRATEGY

Context, Application Related



Process Options

- ⇒ Drop
- ⇒ Publish
- ⇒ Protect, but Do Not Transfer
- ⇒ Joint Development Program
- ⇒ Exchange Personnel
- ⇒ License
- ⇒ Sell



Transferee Options

- ⇒ Established vs. Startup
- ⇒ Large vs. Small
- ⇒ Regional vs. National
- ⇒ Domestic vs. Foreign



IMPLEMENTATION CONSIDERATIONS

- ◆ Attribute Matrix
- ◆ Compatibility
- ◆ Cost
- ◆ Equipment Availability
- ◆ Users
- ◆ Size



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