



Strategic Advising for Successful Commercialization Offices

**RTI's Technology
Commercialization Support**

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Strategic Advising

In addition to offering market research and licensing support for technology licensing offices (TLOs), RTI provides strategic consulting on the technology commercialization and IP management issues important to you. Whether you need help identifying areas for improvement in policies or procedures by benchmarking performance against the best practices of peers, or technology commercialization training for staff at all levels, or expert interim support in meeting a host of other challenges, let RTI be your strategic advisor.

You will benefit from RTI's exposure to and familiarity with universities, federal labs, corporations, economic development agencies, and a wide variety of other clients. We leverage their successes and lessons learned to provide you with keen insight on a number of different subjects. Our experience with strategic advising techniques, combined with our knowledge of technology-based relationships, makes RTI the ideal partner. Put our years of experience in technology applications and partnerships to work tackling your strategic challenges.

*From tactical to strategic, RTI
offers a full range of services
to meet your technology
commercialization needs*



Best Practices

Technology transfer is a continually evolving practice. As new tools and procedures are introduced and expectations from stakeholders change, questions arise for TLOs: What is the competitive position of our organization? How can we plan for the future? What are the current best practices in technology transfer and how do we compare? RTI's years of experience and breadth of contacts provide a strong platform for answering these and other questions.

To enhance your understanding of best practices either generally or on a specific topic, we perform functions such as the following:

- Conduct operational reviews to identify areas for efficiency gains and performance improvement.
- Benchmark the capacity, capabilities, policies, and practices of TLOs.
- Facilitate strategic planning processes to develop a blueprint for increasing technology transfer and boosting economic development outcomes.
- Define steps to enhance the entrepreneurial culture both within and around leading research institutions.

We help you evaluate the outcomes from best practice analyses to provide a roadmap for making future investments and decisions.

Strategic Planning Case Study: University of Louisville

The University of Louisville Office of Technology Transfer (OTT) desired to create a five-year business plan identifying specific business strategies that would enable more effective interactions with industry and position the OTT to move forward in a way that would maximize engagement potential with corporate partners. The OTT enlisted RTI to facilitate this process.

RTI led the OTT through a strategic planning process that culminated in a five-year business plan and operational review for the office. Involving several distinct steps, the process included a situational analysis, a benchmarking study, and a thorough look at the office in terms of goals, mission, staffing, and processes. Next, RTI focused on the operations and business planning, helping the OTT build a plan that projected forward into five-year budgets, staffing plans, and even office needs. This plan gave OTT the tools and roadmap needed to reach its goals and, more importantly, create buy-in from internal and external stakeholders.

Operational Review Case Study: University of Minnesota

The University of Minnesota Office for Technology Commercialization (OTC) wanted to restructure the office and create a business model that would significantly increase revenue by shifting time spent on certain functions from licensing staff to support staff and by reducing inefficiencies and time-consuming tasks across the organization.

OTC selected RTI to review the internal operations of the OTC office to aid in the development of a support organization that assists the licensing function. Conducting a thorough review of current OTC procedures, tools, and resources, RTI reviewed and documented office work flow processes, identified bottlenecks and paper-laden steps, and developed solutions to address these areas and help accomplish the desired organizational changes and planned revenue and efficiency goals. RTI's investigations included on-site interviews, reviews of current and proposed process changes, interviews with peer universities, and review of vendor-supplied IT tools. RTI's recommendations have the potential to save hundreds of hours of staff time each month and set the stage for generating millions of dollars in additional revenue for the university in the next five years.



Interim Support Case Study: Virginia Tech Intellectual Property, Inc.

Virginia Tech found itself in a transition phase, with a newly hired director for Virginia Tech Intellectual Properties, Inc. (VTIP) and the task of hiring several new licensing managers. Because recruiting and hiring new licensing managers takes months, VTIP turned to RTI to provide support in the interim.

RTI provided interim case management staffing and support to help organize the VTIP caseload and keep cases moving while full-time staff were recruited. RTI's interim support team supplied a broad range of support to the office through both on-site and off-site activities:

- Executing inter-institutional agreements
- Advising on pending license agreements
- Advising on U.S. and international patent decisions
- Conducting license compliance reviews
- Meeting with faculty to review new and existing disclosures
- Marketing technologies to potential licensees

Through RTI's interim support, cases were moved forward, licensing and patenting decisions were made, faculty needs were met, and the portfolio was prepared for the incoming full-time staff.

Interim Support

RTI understands that TLOs periodically need additional staffing during times of change and heavy workload. RTI is well positioned to provide interim staffing and support to help organize the office and keep the work flow moving while full-time staff are found and hired. Offering the collective experience and expertise of 25 full-time staff and over a dozen consultants, RTI's professionals are knowledgeable in managing technology transfer operations as well as evaluating, marketing, and licensing early-stage technologies.

RTI creates an interim support team that provides a wide array of services to the office. From reviewing incoming invention disclosures and developing commercialization plans based on thorough market analyses to marketing a technology and advising on negotiations for sponsored research and inter-institutional and licensing agreements, RTI seamlessly fills the voids. Additionally, RTI can meet with faculty to uncover technologies that could be commercialized, evaluate existing portfolios to identify both promising technologies and cases that warrant closure, and advise on patent maintenance decisions.

An added benefit of using RTI to fulfill this need is the advantage of having multiple technology areas covered for less cost than hiring a full-time staff member in each area.



Training

Improving technology commercialization at your organization may mean training staff at all levels—researchers, upper administration, commercialization staff, or support personnel. RTI offers training modules for any audience, designed to improve capabilities or enable better understanding of roles and processes in technology commercialization.

Grounded in over 40 years' experience in technology transfer and extensive knowledge of best practices, RTI conducts training for people who are impacted by or involved with technology transfer processes. Training modules can be customized to ensure that clients receive the training needed to address their critical issues. Some of the topics that may be covered include the following:

- Managing internal and external customers
- Evaluating early-stage technology
- Applying resources and techniques for market research
- Identifying and reaching out to potential licensees
- Crafting the value proposition for a technology
- Developing defensible valuation of technologies
- Negotiating win-win agreements

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RTI International is one of the world's leading research institutes, dedicated to improving the human condition by turning knowledge into practice. With projects in more than 40 countries and a staff of more than 2,600, RTI offers innovative research and technical solutions to governments and businesses worldwide in the areas of health and pharmaceuticals, education and training, surveys and statistics, advanced technology, democratic governance, economic and social development, energy, and the environment. For more information, visit www.rti.org.

RTI International is a trade name of Research Triangle Institute.

“RTI has provided exemplary results on a number of projects for UNC. In every case, RTI team members have rolled up their sleeves and been an integral component from the start.

“They are responsive to our needs, creative in their approaches, and innovative in the solutions provided.

“Our success with the Technology Development Initiative is clearly linked to RTI's involvement.”

*Dr. Russ Lea
Vice President for Research
University of North Carolina System*



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