

APEC Bio-Medical Technology Commercialization Training Center (TCTC)

Triage & Licensing
12-13 July 2018
Breeze Room, 8th Floor,
Four Points by Sheraton Bangkok, Thailand

PROGRAM OUTLINE

Day 1

12 July 2018 (Thursday)	
08:30 – 09:00	Registration
09:00 – 09:15	Welcoming & Photo Session
09:15 – 10:45	<p><u>SESSION I: TRIAGE - EVALUATING INVENTION DISCLOSURES</u></p> <p>This module will discuss identification and evaluation strategies for the technology transfer/technology commercialization organization itself and how to find marketable inventions in your institution. Other topics to include:</p> <ul style="list-style-type: none"> • Finding the Invention – Faculty Marketing • Invention Disclosure Triage and Research • A Selection of Models to Implement
10:45 – 11:00	Break
11:00 – 12:30	<p><u>SESSION II: TRIAGE - EVALUATING INVENTION DISCLOSURES</u></p> <p>This module will cover the basic concepts of licensing and licensing strategies. A good licensing strategy will consider the needs of both the technology owner and the licensee and attempt to create a relationship that is satisfactory for both sides. Other topics will include:</p> <ul style="list-style-type: none"> • Goals and objectives of licensing • Maximizing technology use versus maximizing financial return • Impact of licensing strategy on valuation exercises • Startup companies as licensing strategy
12:30 – 13:30	Lunch
13:30 – 15:00	<p><u>SESSION III: TECHNOLOGY VALUATION</u></p> <p>This module will cover the basic concepts of technology valuation. Topics will include:</p> <ul style="list-style-type: none"> • Methods of Valuation • Comparison of valuation and pricing • Approaches to sharing revenues through licensing • Effects of risk on valuation • Finding information to use in valuation

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15:00 – 15:20	<i>Break</i>
15:20 – 16:20	<p><u>SESSION IV: STRATEGIES TO GET LICENSEES TO PAY</u></p> <p>Getting an executed license is very important to a technology transfer office but it is just the beginning! The technology transfer office still has to manage that deal for the life of the agreement and ensure the university is getting the full benefit of the deal. This can be a major undertaking as your portfolio of licenses grows. This session will cover some of the common issues that arise during license management and provide helpful solutions and suggestions.</p>
16:20 – 17:20	<u>ONE-ON-ONE CONSULTATION</u>

Day 2

13 July 2018 (Friday)	
09:00 – 10:20	<p><u>SESSION V: HOW TO EFFECTIVELY COMMUNICATE THE VALUE PROPOSITION</u></p> <ul style="list-style-type: none"> • Value Proposition • The Elevator Pitch • Customer Discovery
10:20 – 10:40	<i>Break</i>
10:40 – 12:00	<p><u>SESSION VI: CREATING VALUE –TECHNOLOGY MARKETING</u></p> <p>This module will cover the basics of creating a marketing plan and commercialization strategy. We will discuss the essentials of marketing and minimum expectations to have a technology noticed by an industry partner including key data points for decision makers. Marketing versus selling</p> <ul style="list-style-type: none"> • Creating an opportunity pipeline • Creating strategic “themes” in marketing to attract licensees • Expanding potential markets for high-value technologies <p>(We would like to bring in a local representative to talk about considerations and successful partnering structures for the region.)</p>
12:00 – 13:30	<i>Lunch</i>
13:30 – 14:50	<p><u>SESSION VII: CASE STUDY: A LICENSING DEAL SUCCESS CASE</u></p> <p>A step by step from the cradle to licensing. Why did the licensing succeed?</p>
14:50 – 15:10	<i>Break</i>
15:10 – 16:30	<p><u>SESSION VIII: CASE STUDY: A LICENSING FAILURE CASE: WHY AND HOW TO DEAL WITH IT</u></p> <p>A step by step from the cradle to licensing. Why did the licensing fail? How to deal with it and the lessons learn.</p>
16.30-16.50	<u>COURSE WRAP-UP</u>

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SPEAKERS' OUTLINE



Joseph Janda, RTTP

Director of Innovation & Intellectual Property
Portland State University, USA

Joseph Janda has worked with early stage technology evaluation, IP development and licensing, and university technology start-up companies for over a decade. His experience spans university technology transfer offices at Stony Brook University in New York, George Mason University in Virginia, and for a brief time Oregon Health and Science University focusing on the Knight Cancer Institute. He has been the Director of Innovation & Intellectual Property at Portland State University since 2011.

In these roles he has facilitated the movement of technologies and knowledge from university labs to commercial entities across a broad range of disciplines and assisted in the formation of several university start-up companies in the fields of cancer and heart disease diagnostics, drug screening, early stage pharma, and remote sensors. As a board observer he has also coached and participated in start-up companies through their first years of operation.

Joseph has also managed an independent consulting firm since 2015, Sunbreak Consultants, LLC, which advises on strategy, financial modelling, and business development for a range of technology based start-ups. He also sits on the board of two state Signature Research Centers, Oregon BEST (Built Environment and Sustainable Technologies center) and the Oregon Biosciences Incubator.

He has also worked as a house painter, veterinary assistant, high school math teacher, biotechnology manufacturing technician, door to door vacuum cleaner salesman, and once spent a summer in a biomedical engineering lab collecting colorful images of human molars being zapped with a laser.



Brian Shedd, Ph.D.

Committee Member and Instructor
Association of University Technology Managers (AUTM)
Essentials Program

Brian Shedd is currently the President and Founder of Precision Technology Consulting, a freelance consulting company focused on delivering services to technology transfer offices and companies of all sizes. Prior to his consulting career, Brian worked in technology transfer roles at LSU and UCLA. At LSU he was the Assistant Director of the Office of Innovation & Technology Commercialization (ITC) at Louisiana State University (LSU). ITC is responsible for intellectual property protection and commercialization of all of the research that takes place on the LSU campus. There he created and managed ENGINEERING INNOVATION, a program housed within the College of Engineering at LSU designed to engage faculty, staff, and students in commercialization of engineering research initiatives. Additionally, he served as the lead administrator of LSU's NSF I-Corps Site Program that prepares scientists and engineers to move beyond the university setting and help drive their research towards commercialization.

Brian also worked at UCLA in their technology transfer office, the Office of Intellectual Property, which is now known as the Technology Development Group. During his time at UCLA, he also served as a Board Member to PortTech Los Angeles, a business incubator focused on developing technologies for the Port of Los Angeles. Together with the Port of Long Beach, it ranks as the 10th largest port in the world. He also served as a Leadership Council Member for the Los Angeles Cleantech Incubator, and a lecturer in the UCLA Anderson School of Management. He is also responsible for the creation and management of BRUINcubate, the UCLA Entrepreneur Support Network, involving more than 20 different entrepreneurial support organizations located on campus.

Brian Shedd is a native of Baton Rouge, Louisiana but has lived across the US and even internationally. Brian received his PhD and MS degrees from UCLA in Mechanical Engineering and during his graduate studies, completed international visiting researcher programs with the Korea Advanced Institute of Science and Technology (KAIST) in Daejeon, South Korea and the Intelligent Polymer Research Institute (IPRI) at the University of Wollongong, Australia. Brian also has a BS in Mechanical Engineering from the University of Colorado, Boulder and a BA in Physical Science from Southwestern University in Georgetown, Texas.

As an engineer, Brian worked for Alliant Techsystems (ATK) in Clearfield, Utah as a Composite Tooling Engineer to help support rocket engine manufacturing on programs such as the Delta Rocket and Joint Strike Fighter. He also worked for General Electric in their Corporate



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Research and Development facility in Niskayuna, New York as an Electronic Reliability Engineer, helping to “bring good things to life.”

Throughout Brian’s technology transfer career, he has been involved in training, education, and promotion of the technology transfer profession both domestically and internationally. He is currently a committee member and instructor for the Association of University Technology Managers (AUTM) Essentials Program and has participated in numerous panels and speaking engagements at AUTM’s annual meetings. Internationally, Brian has been involved with the Commercial Law Development Program through the Office of the General Counsel within the US Department of Commerce, and the EURECA Program, which is an initiative of the US Russia Foundation for Economic Advancement and the Rule of Law (USRFL) developed to support the establishment of a national research university network in Russia.



Lerson Tanasugarn, Ph.D., RTTP

Technology Transfer Consultant

Dr. Lerson Tanasugarn taught biochemistry at the Faculty of Science, Chulalongkorn University for 3 decades while working to shape the intellectual property and technology transfer policies of Thailand. In the late 1980s he served as Science and Technology Policy Advisor to the Prime Minister. In the early 1990s, he was on the intellectual property law drafting committees that modernized Thai IP laws in response to the conclusion of the Uruguay Round of GATT. Around that time, he was among the first group of Thai professionals who were trained in the ECAP-1 Program to draft patent applications. After working with patents for a few years, he switched to technology licensing and began taking courses from AUTM. In the mid-1990s, he became director of the technology transfer office of Chulalongkorn University, the first such office in Thailand. When the Central Intellectual Property and International Trade Court was established in 1997, he served as an Associate Judge for a term of 5 years. During the past decade, he delivered several major lectures on intellectual property and on technology transfer/licensing for organizations like WIPO Summer School, Thai Bar Association, Department of Intellectual Property (DIP), and Thailand Center of Excellence for Life Sciences. Recently he took part in the APEC-TCTC program as a participant and an instructor. In early 2017, he was designated a Registered Technology Transfer Professional (RTTP) by the Alliance of Technology Transfer Professionals (ATTP).

Dr. Lerson was also on the engineering board of the National Research Council of Thailand, on the executive board of the National Center for Metals and Materials, on the National Committee for Space Affairs, on the Scholarship Sub-commission of the Civil Service Commission, and on the NanoSafety Sub-committee under the NANOTEC Board.



Dr. Phayat Wutthirong

Value Creator and Innovation Strategist

Dr. Phayat Wutthirong is highly recognized as an expert in Innovation Management, People, Organization, & Commercialization. He had developed Thailand Total Innovation Management (TIM) System, and has promoted a number of successful innovations from Research to Commercialization. He is an executive committee of the Innovation and Intellectual Property Association of Thailand.

Dr. Phayat got a Master Degree of Management from Mahidol University with exceptional GPA at 4.00, before getting his doctoral degree in Human Resource Management/Innovation from the National Institute of Development Administration (NIDA). He worked as an executive on sales, marketing and business planning for Siam Cement Group (SCG) for almost 20 years and was awarded the Winner of Marketing and Innovation Best Awards in SCG.

Dr. Phayat has worked as an advisor on IP Management & Commercialization and Total Innovation Management of a few public organizations during 2010-present, the Institute of Technology Transfer and Innovation of Mahidol University during 2014-2016, and a Consultant and Trainer on Creativity and Innovation, Marketing and HR of Thailand Top Organizations. He is also a special lecturer on innovation management at a number of Thailand Top Universities, and a columnist on Value Creation and Innovation Smart SME.

Dr. Phayat is an author of the Innovation Management Best Seller Books of Chulalongkorn University Press.



Eliza Stefaniw, RTTP

Advisor for International Agreements

King Mongkut's University of Technology Thonburi

Eliza Stefaniw is an Advisor for International Agreements working in the Research, Innovation, and Partnerships Office at King Mongkut's University of Technology Thonburi (KMUTT). At KMUTT, Eliza works on the development of university IP management, from strategy to operations and from IP protection to IP licensing. In addition, she focuses on capacity building within the innovation ecosystem of KMUTT and Thailand, from teaching patent and technology transfer skills to mentoring students and early stage start-up companies.

She has over 19 years of experience in intellectual property law and management, as a patent examiner, patent agent, intellectual property attorney and advisor in the US and Thailand. Eliza strives to maximize innovation impact by listening to inventors and clients and crafting tailored strategic solutions.

Before moving to Thailand, she was an associate in the Silicon Valley office of Morgan, Lewis, and Bockius. Eliza became a registered US patent agent in 2001 and obtained her JD from Georgetown University Law Center in 2003. She holds a masters in physics from the University of Rochester, where she was an Office of Naval Research Graduate Fellow. She received a bachelors in physics and Russian with a concentration in international economic relations from Bryn Mawr College.

As a scientist, Eliza supported the Lab for Computational Physics and Fluid Dynamics at the U.S. Naval Research Laboratory where, among other things, she learned how to present complex dynamic systems to lay people. Other jobs include supporting technical implementation of the Comprehensive Nuclear Test Ban Treaty, spinning milkshakes at a diner, teaching high school physics, enumerating households in rural Alabama, and assisting a technical librarian.