

| Course Title  | Duration | Who Should Attend?  | Outcome   |
|---|----------|---|---|
| Intellectual Property Management for Projects and Teams | 1 Day    | Project managers and team leaders.<br>IP liaison officers and accountability holders.   | <ul style="list-style-type: none"> <li>~ Understands the different forms of intellectual property, and their role in securing business advantage.</li> <li>~ Is able to identify and discharge the actions that projects and teams should undertake to manage the intellectual assets their team accesses and generates.</li> <li>~ Is able to apply simple tools designed to help identify protectable concepts and innovations.</li> </ul>  |
| Knowledge Management for Projects and Teams             | 1 Day    | Project managers and team leaders, or those responsible for managing knowledge assets on their behalf.  | <ul style="list-style-type: none"> <li>~ Appreciates the role of knowledge management in the successful development and delivery of products and services.</li> <li>~ Has an overview of the key knowledge management tools available for projects and teams.</li> <li>~ Understands how to identify those knowledge assets requiring active management.</li> <li>~ Is able to identify and discharge the actions that projects and teams should undertake to manage the knowledge assets their team accesses and generates.</li> </ul> |
| Intellectual Asset Management for Projects and Teams.   | 2 Days   | Project managers and team leaders, or those responsible for managing knowledge assets on their behalf.<br>IP liaison officers and accountability holders. | <ul style="list-style-type: none"> <li>~ Combines the above two courses.</li> </ul>   |
| Intellectual Property for Researchers                   | 1 Day    | R&D personnel and those involved in innovation.   | <ul style="list-style-type: none"> <li>~ Understands the different forms of intellectual property, and their role in the commercialisation of R&amp;D projects.</li> <li>~ Is able to conduct patent searches using publicly available databases.</li> <li>~ Is able to identify, and discharge, the actions researchers should undertake to manage arising innovations.</li> </ul>   |
| IP Issues in Contracts                                  | 1 Day    | Procurement professionals.<br>Licensing Executives.   | <ul style="list-style-type: none"> <li>~ Understands the principal IP issues that need to be addressed by contracts.</li> <li>~ Is able to ensure contracts address these issues.</li> </ul>  |
| IP Valuation and Metrics                                | 1 Day    | Those managing an IP portfolio, or involved in the licensing or sale of IP.   | <ul style="list-style-type: none"> <li>~ Understands the strengths and weaknesses of the principal methods available to value intellectual assets.</li> <li>~ Is able to generate an indicative value for many types of intellectual asset.</li> </ul>  |

## Intellectual Property Management for Researchers

This one-day course is accompanied by full supporting notes and includes crib-sheets highlighting key messages and learning points.

### Overview

Researchers should:

- ↗ Be aware of the different forms of intellectual property right that can be used to protect their innovations.
- ↗ Be able to search external databases to identify other organisations' patented innovations.
- ↗ Be able to identify the IP risks and opportunities that should be addressed by research proposals, contracts and collaborations.

### Session 1 : Learning from Mistakes

This is an interactive session, making use of a mixture of real and hypothetical examples to highlight the mistakes research projects can make if they fail to proactively manage the knowledge and IP they access and generate.

### Session 2 : The Legal Framework

This session provides a plain-English overview of the different forms of intellectual property. Examples are used to illustrate the scope and limitations of the various forms of intellectual property right. This session includes topics of particular relevance to researchers, such as; laboratory books, patent busting and what constitutes an "inventive step".

### Session 3 : Infringement and Patent Searching

Covering:

- ↗ How to search publicly available patent databases.
- ↗ How to develop a search strategy.
- ↗ What to do if third party patents are identified that appear to anticipate internal research.

### Session 4 : IP Aspects of Research Proposals and Agreements

This final session will examine the IP issues that need to be addressed in:

- ↗ Research proposals / programmes - to ensure the results of any research can be effectively leveraged by the sponsoring organisation.
- ↗ Collaborative agreements.
- ↗ R&D contracts.

## Intellectual Property Management for Projects and Teams

This one-day course is accompanied by full supporting notes and includes crib-sheets highlighting key messages and learning points. IP&AM Ltd has created a range of these sheets, each developed for a different type of organisation/market; however, there is often merit in developing a version tailored to the specific needs of your organisation.

### Overview

Projects and teams should leverage and improve their organisation's intellectual property (IP) portfolio. This one-day course is designed to help teams generate a fit-for-purpose action plan describing the actions that should be undertaken to manage these assets.

#### **Session 1 : Learning from Mistakes**

This is an interactive session, making use of a mixture of real and hypothetical examples to highlight the mistakes projects and teams can make if they fail to proactively manage the knowledge and IP they access and generate.

#### **Session 2 : The Legal Framework**

This session provides a plain-English overview of the different forms of intellectual property. Examples are used to illustrate the range of material that can be protected together with the associated actions and costs.

#### **Session 3 : The Contents of an IP Plan**

This session explores the key actions projects and teams should undertake to manage the knowledge and IP they access and generate. Delegates will be given a "crib-sheet", providing a high level summary of the key issues that managers should ensure are addressed by their project(s) and team(s).

#### **Session 4 : Identifying IP**

This session looks at some simple tools that can be used to:

- Help projects and teams identify their key knowledge and IP assets, and the actions that need to be taken to protect each asset.
- Review the alignment of existing IP to business strategy.

#### **Session 5 : An IP Plan in Practice**

This final session will allow delegates to use template IP Plans to develop an outline action plan for their area of responsibility/interest.

## Knowledge Management for Projects and Teams

This one-day course is accompanied by full supporting notes and includes crib-sheets highlighting key messages and learning points.

### Overview

Projects and teams both leverage and improve their organisation's knowledge portfolio. This one-day course is designed to help teams generate a fit-for-purpose action plan describing the actions that should be undertaken to manage these assets.

### Session 1 : Learning from Mistakes

This is an interactive session, making use of a mixture of real and hypothetical examples to highlight the mistakes projects and teams can make if they fail to proactively manage the knowledge assets they access and generate.

### Session 2 : Overview of Knowledge Management Tools




This session provides an overview of the key processes used by organisations to enable the sharing and preservation of knowledge assets. Examples of successful implementations are given. Emphasis is placed on describing tools such as Post Project Reviews, Peer Assists and Knowledge Markets, which can be used by projects without their company making a significant investment in infrastructure (e.g. IT).

### Session 3 : The Contents of a Knowledge Plan

This session explores the key actions projects and teams should undertake to manage the knowledge they access and generate. Delegates will be given a "crib-sheet", providing a high level summary of the key issues that managers should ensure are addressed by their project(s) and team(s).

### Session 4 : Identifying Key Knowledge Assets

This session looks at some simple tools that can be used to:

-  Help projects and teams identify their key knowledge and IP assets, and the actions that need to be taken to protect / leverage each asset.
-  Capture and share information.
-  Review the alignment of existing knowledge to business strategy.

### Session 5 : A Knowledge Plan in Practice

This final session will allow delegates to use template Knowledge Plans to develop an outline action plan for their area of responsibility/interest.

## Intellectual Property Issues in Contracts

This one-day course is accompanied by full supporting notes and includes crib-sheets highlighting key messages and learning points.

### Overview

This course concerns the IP provisions of contracts and, in particular, how any contract:

- ↗ Should distribute rights to, and ownership of, arising IP, while ensuring the customer:
  - Is able to exploit the contract's deliverables.
  - Has the ability to competitively tender follow up work.
- ↗ Should enable, where appropriate, the transfer of knowledge between the subcontractor and customer.
- ↗ Should incentivise subcontractors to apply innovative and cost saving solutions.
- ↗ Should avoid creating, or entrenching, monopolistic supply positions.

### Session 1 : Learning from Mistakes

This is an interactive session, making use of a mixture of real and hypothetical examples to highlight the mistakes that can be made in the preparation of a contract strategy and during contract drafting.

### Session 2 : The Legal Background

This session provides a plain-English overview of the different forms of intellectual property. Examples are used to illustrate the scope and limitations of the various forms of intellectual property right.

### Session 3 : Contract T&Cs

Contractual drivers, and the options for drafting IP T&Cs, are considered in the following areas:

1. Ownership, rights to, and reporting of arising IP.
2. Rights to subcontractor background IP.
3. IP warranties, guarantees and indemnities.
4. The marking of documentation.
5. The transfer of knowledge from the subcontractor.

The key components of an ideal Procurement Process are then considered.

### Session 4 : Examples

Examples of flawed and strong contract terms are used to highlight key learning points.

## The Valuation of Intellectual Assets

This one-day course is accompanied by full supporting notes and includes crib-sheets highlighting key messages and learning points.

### Overview

There are many reasons why an organisation may wish to determine the value of a specific intellectual asset, or even undertake a programme to systematically value sections of its portfolio. These include:

- ↯ To assist in internal decision making (e.g. to decide if the cost of seeking IP protection is justified).
- ↯ To assist in licensing negotiations.
- ↯ In dispute resolution.
- ↯ For tax, or other accountancy purposes.

### Session 1 : Alternative Valuation Methods

This session explores the strengths and weaknesses of the various standard valuation tools:

- ↯ The Income Approach which seeks to calculate a value for any given intellectual property (IP) asset by aggregating all expected income and expenditure.
- ↯ The Cost Approach which values IP assets by aggregating either the historic costs of their generation or the cost that would be incurred in their reproduction.
- ↯ The Market Approach, which seeks to determine the value of an IP asset by reference to another of known value (i.e. one which has been traded for a known value between unrelated parties).

### Session 2: Relief from Royalty Approach

This session uses a case study to illustrate the use of the Relief from Royalty Approach (a combination of the Market and Income Approaches).

### Session 3 : Alternatives to Valuation

In many situations, instead of determining a financial value, it is sufficient to develop simple metrics showing the alignment of the asset to business need. This session examines the development and use of metrics.

### Session 4 : Example

This session allows the delegates to apply the lessons they have learned to a number of case studies.