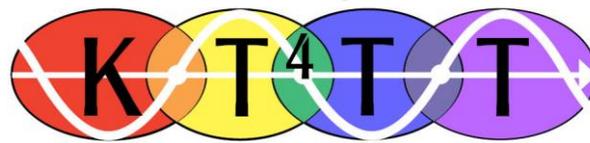


Technology Transfer Planning Template

Question List

by

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Introduction

What is the TTPT? The Technology Transfer Planning Template (TTPT) is an online planning tool for creating technology transfer and commercialization plans. Inventors and project investigators who are developing inventions that may have market potential can benefit from the template's intuitive interface.

What does the TTPT do? The TTPT guides users through describing their development projects, planned outputs, and potential impacts. It offers resources to quantify the size of potential target markets and to generate business cases for new inventions. It offers simplified access to the Need to Knowledge Model components, and provides links to informational resources for planning and completing critical process steps.

How can I access the TTPT? The TTPT is available for use 24/7, free of charge at this link:

<https://sphhp.buffalo.edu/cat/kt4tt/projects/development-projects/technology-transfer-planning-template/ttpt-user.html>

What is this list of questions? The following listing includes all questions posed by the TTPT. It is broken into three parts. The first part asks for basic project information, such as what is being developed, who is working on the project, and what the plans are for each major stage of activity. The second part gathers more detail about the project's technical objectives, and information related to how the end product will get into consumers' hands. The third part relates to production, sales, and marketing activities. The online version of the TTPT links resources, examples, and guidance to each question.

Part 1- Project Overview

1. What is the name of your project?
 - a. What is the project start date?
 - b. What is the project end date?
2. What are you creating/developing?
3. As described by the end users, what problem does your product solve or what unmet need does it fulfill?
4. The product solves the problem/ fulfills the unmet need by...
5. Generating your proposed solution may require you to conduct scientific research, to develop inventions using engineering methods, and/or to employ production capabilities to create final products. Check the boxes that relate to the project activities you would like to describe in your technology transfer plan. [I plan to conduct research, I plan to conduct engineering development, I plan to produce the product]
6. Who will be responsible for manufacturing, selling and servicing your product when it is in the market? Select the response that best fits your plans
 - a. All activities will be done in house.
 - b. Some activities will be performed by external parties (outsourcing).
 - c. All manufacturing, selling, and servicing will be performed by external parties.
7. Who will use your product?
8. Will someone always or sometimes have to prescribe this product to the user? YES/NO
 - a. If yes, who will prescribe the product?
9. Who will pay for the product? Select all that apply
 - a. No one- the product will be free.
 - b. Users will pay out of pocket.
 - c. A caregiver, friend, or relative.
 - d. An organization or institution (school, hospital, etc).
 - e. Health insurance (public or private).
 - f. Other
10. How does the target customer currently meet the need that your product will address?
11. Why is your product superior to existing alternatives?
12. What problems might you encounter in creating, testing, transferring, and selling your product?
13. How will you overcome the problems you stated that you might encounter?

Part 2- Development Plans and Market Potential

Research Activity- Objective and Process

1. Briefly describe the knowledge being sought with research activity that is being conducted before a prototype has been developed.* Also describe the research process being used to gather that information.
 - a. When will this activity occur? [Start date; End Date]

Development Activity- Technical Objectives

2. What technical objectives do you intend to achieve through your development activity?
3. Have you established an engineering implementation plan to achieve your objectives? [Yes; No]
4. If yes- Describe the details that are included in your engineering implementation plan.
5. If no- when will you establish an engineering implementation plan? [Enter date]

Development Activity- Project Partners

6. You previously indicated that (All activities will be done in house; Some activities will be performed by external parties (outsourcing); All manufacturing, selling, and servicing will be performed by external parties.). Describe any strategic alliances, partnerships or licensing agreements you have or plan to put in place to develop, produce, market or sell your product.
 - a. When will (or did) work with project partners begin?

Development Activity- Describe Target Market

7. You previously described the product as being used (response here), and purchased by (response here). These groups make up your target market. Describe and quantify the size of the target market. If appropriate include age, gender, disability or functional limitation.
8. Describe the geographic area where the target market is located, including if the target market is domestic, international, or both.
9. In what setting will the target market use the product?

Development Activity- Describe Market Growth

10. Describe growth trends regarding the size of the target market.
11. Describe anticipated changes to rate of demand over time.

Development Activity- Describe Competition

12. You previously stated that the target market's alternatives include (response here). You also stated that your product will be superior to those alternatives because (response here). Describe the competitive landscape in more detail. For example, you may wish to list the companies that produce the alternative solutions and the cost to the customer to purchase those solutions.
13. Describe barriers to entry that prevent new entrants or current competitors from copying your solution.

Development Activity- Technology Transfer Office

14. Describe your current or planned interactions with your University's Technology Transfer Office.
15. Moving forward, describe the role that the Technology Transfer Office will play in the project.
- a. When will these activities begin?

Development Activity- Protecting Intellectual Property

16. Describe the terms of existing non-disclosure agreements (NDA) or partnership agreements that are in place or forthcoming.
17. If needed, describe how you are going to protect any intellectual property (IP) that results from your innovation.
- a. When will these activities begin?

Development Activity- Regulations and Reimbursement

18. If applicable, describe how you will address regulatory standards and reimbursement requirements for your prototype.
- b. When will these activities begin?

Development Activity- Product Specifications

19. Describe how you have or will develop product specifications. Include details regarding interactions with end users, including how many target users have already, are currently, and/or will later provide feedback on your product or device; and how did/will you go about interacting with the target users? (Focus groups, surveys, participatory development?)
- a. When will this activity occur? [Start date; End Date]

Development Activity- Product Engineering and Testing- Alpha Prototype

20. Describe the steps or tasks involved in creating the alpha prototype. Indicate what tools and techniques will be used, and any costs associated with acquiring or using those tools.

a. When will this activity occur? [Start date; End Date]

21. Describe the testing that will be performed to ensure the alpha prototype functions as desired. Indicate what tools and techniques will be used, and any costs associated with acquiring or using those tools.

a. When will this activity occur? [Start date; End Date]

Development Activity- Product Engineering and Testing - Beta Prototype

22. Describe the steps or tasks involved in creating the beta prototype. Indicate what tools and techniques will be used, and any costs associated with acquiring or using those tools.

a. When will this activity occur? [Start date; End Date]

23. Describe the testing (i.e. user testing and/or field testing) that will be performed to ensure the beta prototype functions as desired. Indicate what tools and techniques will be used, and any costs associated with acquiring or using those tools.

a. When will this activity occur? [Start date; End Date]

Development Activity- Financing and Resources

24. Have you assessed the project's resource requirements and availability of needed resources?

[Yes; No]

a. If yes- Describe the necessary financing you will require to complete this project's research and development effort. When will funding be required, how much is needed, and how will it be obtained?

b. If no- when will resource requirements be evaluated? [Enter date]

25. Are the required resources available and/or already secured and allocated? [Yes; No]

a. If yes- Describe how the resource needs are being met.

b. If no- Describe how the needed resources will be obtained.

i. When will the needed resources be obtained? [Enter date]

Part 3- Production, Sales, and Marketing

Production Activity- Materials and Capabilities

1. Describe the materials needed to produce your product and how they will be obtained.
 - a. When will materials be obtained?
2. Describe how the production of your product/service will occur, including discussion of in-house capabilities and/or those provided by a partner or subcontractor.
 - a. When will production begin?

Production Activity- Financing

3. Describe the necessary financing you require to produce the product and begin generating revenue. When will funding be required, how much is needed, and how will it be obtained?

Production Activity- Marketing and Sales

4. Briefly describe your marketing and sales strategy.
 - a. When will the marketing effort be initiated?
5. Describe any plans for test marketing the product prior to a full-scale launch.
 - a. When will test marketing take place?

Production Activity- Product Launch and Maintenance

6. Describe your plans for full-scale launch of the product.
 - a. When will the full-scale launch occur?
7. Describe your plan for distributing your product.
8. Describe your plans for providing product support and after-sales service.
 - a. When will support activities be initiated?

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