Invention and Marketing – Flow Chart

Case Manager (CM) receives an Invention Disclosure Form (IDF) from Inventor, and distributes to TVO staff.

Senior Financial Analyst (SFA) emails Invention Disclosure Receipt (IDR), informing Inventor of date of next Invention Review Meeting (IRM). Additional information needed from PI is requested at this time.

CM evaluates IDF, and contacts PI to discuss Invention by phone or in person. CM’s evaluation of Invention is recorded by filling out Pre-Patent Filing form (PPF), and stored in JAKE along with any pertinent information.

If a decision has been made to file a patent application, the CM sets up a call between the Inventor and the Patent Attorney. A Provisional Patent Application is filed.

CM comes to the biweekly IRM prepared with PPF and group discusses patentability and commercialization strategy.

CM reports back to PI on the results of the IRM—i.e., that a patent will be filed/not filed, or that additional information is needed for further evaluation.

Invention Review Meeting

TVO Decision

Marketing

Within 10 business days

Within 5 business days
Marketing Continued

The CM, working with the Technology Transfer Specialist (TTS) work to gather marketing collateral - (a non-confidential description (NCD) of the technology plus a list of potential industry partners) Inventor reviews the NCD and discusses potential Licensees with CM.

3 Month Report

CM and TTS produce the 3 month market report which lists all potential Licensees and business development contacts. They meet to discuss the marketing plan.

CM and TTS contact potential business partners, and expand list if necessary. Contacts are made and CDAs put in place.

6-9 Month Report

CM and TTS set up a meeting with the Inventor to discuss the commercialization strategy. They will use the 6-9 month report as a basis to update Inventor and to see if Inventor has new data or any commercial leads. Next steps are discussed.

Based on this set of information and the discussion with the Inventor, a decision will be made to convert to a Utility Patent or to abandon the Provisional.

Licensing

When a commercial partner has been identified, License negotiation begins. Inventor will be kept in loop to the extent that they wish to be. At a minimum they will be provided with a copy of the executed License Agreement and a summary of the deal terms.