

In-House Workshops

by Philip Mendes



For Tech Transfer Offices



For Research Offices



For Researchers



For Founders





About Philip

Philip is an experienced technology transactions professional who negotiated IP transactions for over 25 years with parties in over 25 countries. Most of his clients were universities and research institutes. He has an intimate understanding of the needs and drivers of universities and research institutes.

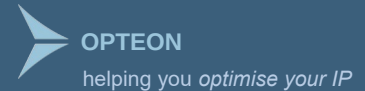
Philip is the author of all workshop content, and personally presents all workshops.

Before retiring he negotiated some of the largest IP transactions arising from Australian research, measured in a number of respects including deal value, export earnings generated, and number of lives saved from new therapeutic drugs and vaccines.

He undertook transactions in all fields of science, including pharmaceutical, biotechnology, information technology, medical devices, diagnostics, defence, engineering and materials sciences etc.

He negotiated with all the world's largest pharmaceutical companies, and multinational companies in other fields.

He is an Adjunct Professor at the Queensland University of Technology, where he has taught Management and Commercialisation of Intellectual Property in the WIPO/QUT Masters Program.



About Philip's Workshops

Skills Building

The object of Philip's workshops is to build new skills and to improve existing skills. Workshops go well beyond just providing information.

Interactive

Workshops are interactive, with participants encouraged to ask questions, make comments, share experiences, participate in short role play exercises, as well as more extensive practical exercises. This keeps participants alert and focused on the workshop, and improves learning outcomes.

Case studies

Numerous short case studies are presented throughout all workshops, drawn from Philip's 25 years experience.

Public Workshops

The workshops described here have been conducted as public workshops throughout Australia and Asia.

In-house workshops for a single organisation

Workshops have also been conducted "in-house" for a single organisation's staff.

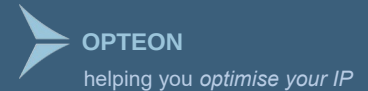
In-house workshops for two or more organisations

Workshops have also been conducted "in-house" for two or more organisations for their combined staff. Fees are the same regardless of number of attendees, and regardless of number of organisations whose staff attend. In the latter case, fees are apportioned between the organisations in the proportions they request.

Customised workshops

A workshop can be customised so that its content focuses specifically on the skills that are sought to be built.

Our Newest Advanced Workshop in 2025



For Tech Transfer Offices



For Research Offices

Research Collaborations and Research Agreements

Level: Advanced

Duration: 1 day

A major focus of this skills building workshop is negotiating the ownership of IP in research agreements, including:

- IP ownership models in Research Agreements
- IP ownership models in Collaboration Agreements between a university and company
- IP ownership models in Collaboration Agreements between two or more universities
- Joint ownership of IP and its downsides, and how to manage joint ownership.

In particular it focuses on strategies that equip you to:

- Resist demands for you to concede the ownership of the IP you create
- Resist demands for you to concede the joint ownership of IP you solely create.

Also covered are

- Managing the risk of unpaid research monies
- Managing the participation of
 - Students, and
 - Visiting Scientistsin research projects subject to contractual obligations.
- Terms in Collaboration and Research Agreements that you should expect
- Terms in these agreements that are not so common and which you should avoid.

Our Newest Basic Workshops in 2025

What Researchers Need to Know About IP and Commercialisation

Level: Basic

Duration: 1 day or 2 half days

For Researchers

This workshop has been designed specifically for researchers and students.

It introduces them to intellectual property, and to commercialisation.

Its aim is to remove some of the myths that researchers and students sometimes mistakenly believe about intellectual property and commercialisation.

The program includes:

- What IP is
- How it is Commercialised
- Commercialisation pathways
- Researcher's role in commercialisation
- Evaluating Technology for Commercialisation
- How researchers create commercialisation opportunities

What Founders Need to Know About IP

Level: Basic

Duration: 1 day or 2 half days

For Founders

This workshop focuses on the protection of a startup company's IP.

It deals in greater detail with all the categories of IP that the startup must recognise and protect, including trademarks.

It also deals more thoroughly with

- the patent application process
- the trade mark application process
- the dangers to the company of joint ownership of IP that it must recognise
- how to manage joint ownership

Particular attention is paid to securing to the startup the ownership of IP created by

- Employees
- Contractors
- Directors
- Scientific Advisory Boards .

What Founders Need to Know About Startup Companies and Venture Capital

Level: Basic

Duration: 1 day or 2 half days

For Founders

This workshop focuses on two aspects of start up companies.

The first is the setting up, structure, and management of companies – the minimum that every company director must know

The second is focused on seeking angel, seed, or venture capital

- An investor's investment criteria
- Pitching
- Preparing for an investor's due diligence
- What to expect from an investor's term sheet
 - What is negotiable and what is not
 - Share preference rights
 - Anti-dilution models to watch out for
 - Option and share plans
 - Company governance and the investor's participation.

Our Programs - Advanced

Licensing Master Class: Mastering the IP License – Terms and Strategies

Level: Advanced
Duration: 2 days



For Tech Transfer Offices

This Master Class will:

- help your staff recognise licensing terms and issues that may disadvantage you
- help them effectively deal with those issues
- expand your staffs' toolbox of solutions to controversial and complex licensing issues
- help your staff achieve better licensing outcomes
- improve your staffs' licensing skills.

Every part of a license is examined in detail, particularly the controversial and complex aspects of a license that can sometimes result in impasse or anxious negotiations.

A major focus of the workshop is to give your staff an expanded toolbox of solutions to call upon when they encounter these controversial and complex licensing issues.

The workshop is suitable for novice licensing professionals wanting to accelerate their skills building. The workshop is also suitable for experienced licensing professionals wanting to hone their licensing skills

Formulating Royalty Rates and Other Financial Terms

Level: Advanced
Duration: 2 days



For Tech Transfer Offices

A licensor does not want to settle for a 5% royalty when the technology deserves 10%. A licensee does not want to pay a 12% royalty when the technology deserves no more than 8%.

When your staff negotiate a license of technology they need to know what royalty rate and other financial terms they should seek (as a licensor) or agree to pay (as a licensee).

This intense skills development workshop will teach your staff how to make that determination. It will show them the methodologies they should employ, and those they should not, and why. It will show them the sources of public domain information that they need to help them make that determination.

It will teach them the skills that they need, to reliably make that determination.

The aim of this workshop is to give your staff royalty formulation tools and skills that they need to get better financial outcomes in license negotiations.

Our Programs - Advanced

Negotiating Wisely - Strategies for Better Outcomes in IP Transactions

Level: Advanced
Duration: 2 days



For Tech Transfer Offices

There is more to negotiating a license or other IP transaction than formulating the deal terms that you aspire to secure. You also need to formulate negotiation strategies that you will employ to secure them.

It is the strategies that you employ that will influence the outcomes of the negotiation. The better your strategies, the better the deal terms you will be able to secure.

Should you make the first offer in a royalty negotiation, or should you wait for the other party to do so? Which strategy does the experienced negotiator employ, and why?

Are there steps you can take to make your proposals more persuasive to the other party? How do you package and deliver your proposals to make them compelling?

There is more to a negotiation than simply stating what you want. That often results in adversarial positions and impasse.

This workshop presents tried and tested negotiation strategies to achieve the best outcomes when negotiating IP transactions.

Start-Up Companies – Negotiating Investment Terms

Level: Advanced
Duration: 1 day



For Tech Transfer Offices

Venture capital investment into start-up companies has its own unique processes and language. What is a series? What is a tranche? What are pre-emption rights, conversion rights, preference rights, anti-dilution rights, winding up preferences, tag-along and drag-along rights, liquidity events, and matters for consensus?

What are the governance arrangements for a start-up company that a venture capitalist invests in? Does the venture capitalist control the company? What strategies are there to protect the founders in governance arrangements?

What is a shareholders' agreement? What unique things will a venture capitalist seek that it provide for?

What criteria does a venture capitalist employ to judge an investment opportunity? What does a venture capitalist look for when considering investing in a start-up company?

Our intensive one day workshop is designed to demystify the process and language of venture capital investment, and equip you to negotiate with a venture capitalist the terms of its investment.

Our Programs – Advanced

Contract Law for IP Professionals



For Tech Transfer Offices

Level: Advanced
Duration: 2 days



For Research Offices

A large part of this workshop was designed and developed in collaboration with a large university's tech transfer office and research office and has since been extended.

The catalyst for the development of this workshop was the university's assessment that its staff engaged in negotiating IP transactions were better equipped to do so when they had knowledge of aspects of the contractual legal environment in which the negotiation was conducted.

Its staff needed this knowledge to be equipped to recognise and deal more effectively with some of the implications of what they encountered.

An IP professional needs to have a working knowledge of those laws which impact upon the IP transactions they will be involved in. This workshop is about those laws.

Legal implications and potential liabilities do not start when the drafting of a contract commences. They start much earlier. There are legal implications to consider when formulating how to deal with the other party to a transaction. Even earlier, there are legal implications when formulating a research or tech transfer proposal to put before potential collaborators or industry partners.

They start when the negotiation starts, and sometimes earlier, when seeking potential commercial partners.

In this workshop we look at numerous research, collaboration and tech transfer case studies, and at the laws impacting upon the IP professionals that deal with these transactions.

Lurking Legal Traps Awaiting the IP Contract Negotiator

Level: Advanced
Duration: 1 day



For Tech Transfer Offices



For Research Offices

This workshop is a one day condensed version of Contract Law for IP Professionals.

This one day version focuses upon risks and liabilities that may arise in the course of the negotiation of IP contracts:

- License Agreements
- Research Agreements
- Collaboration Agreements
- etc

Our Programs – Basic

Licensing Basics

Level: Basic
Duration: 1 day



For Tech Transfer Offices

This one day workshop is a condensed version of our two day Licensing Master Class.

While the two day Licensing Master Class is intended for tech transfer professionals that already have some licensing experience, this shortened one day program is intended to provide participants with basic licensing skills, for basic technology licenses.

It covers the same topics as Licensing Master Class, but not to the same depth or complexity.

It introduces new licensing professionals to the nature of licensing and the essential terms of a license agreement.

By doing so it equips new licensing professionals to negotiate basic license agreements.

The Basics for IP Professionals

Level: Basic
Duration: 2 days



For Tech Transfer Offices



For Research Offices

This intense and comprehensive skills development workshop has been designed for new IP professionals that need to accelerate their learning of the essential skills they need.

It is also a useful refresher for more experienced IP professionals.

The unique needs and perspective of universities and research institutes are kept in focus.

Common points of tension in university / industry partner relationships are covered, as well as ways to overcome these points of tension.

After this skills development workshop, participants will have an excellent all round appreciation of IP, its management and commercialisation.

Our Programs – Basic

Habits of Highly Successful TTOs

Level: Basic

Duration: 1 day or 2 days



For Tech Transfer Offices

This is one of our most popular in-house workshops.

Its focus is on what the most successful tech transfer offices in Australia and the United States do that is best practice, and even beyond best practice - better practice.

The workshop is based on Philip's intimate association with over 18 tech transfer offices over some 25 years. During this time he was able to observe what they did which was effective, and what they did which was not so effective. He was also able to observe the refinement and improvement of their strategies and processes.

This became the basis not just of this workshop, but also the basis of Philip's Commercialisation Improvement consulting.

In this workshop Philip shares:

- strategies and procedures that contribute to the commercialisation success of the most successful TTOs.
- lessons they learned and what as a result the most successful TTOs make sure they always do, or avoid doing.
- traps that TTOs fell into on their path to success, commercialisation mistakes they made, and which they make sure they never repeat
- "Do's"; "Must Do's" and "Don'ts" of the most successful TTOs

Ultimately, the workshop is about improving a TTO's commercialisation scorecard. That is, securing more commercialisation "hits" and less "misses," by equipping the TTO with the proven strategies and practices employed by the most successful TTOs.

This workshop can be presented in a condensed 1 day version or a more detailed 2 day version..

Who comes to our workshops?

- Tech Transfer Office staff
- Research Office staff
- Licensing staff
- Business development staff
- Tech transfer associates
- Tech transfer analysts
- Researchers
- Founders
- Start up companies
- Lawyers
- Patent attorneys
- Business advisers

Contact Us

Do contact us to discuss your staff's professional development needs and how we can help.

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