

# Steps to be followed

## in Industry – Institute R&D collaboration

For a company that wishes to start an R&D collaboration project with an institute, this is a list of steps to follow.

### Decide what you want

- ◆ Identify the project where R&D collaboration is needed
- ◆ Lay down the end objectives, specifications, time frame and budget
- ◆ Lay down quality standards
- ◆ Identify the combination of products and services that meet the project's needs

### Tie up with a collaborator

- ◆ Use the Match maker to search for and shortlist possible collaborators based on expertise, past projects done in similar areas.
- ◆ Do a survey for, assess and find the most suitable collaborator, based on personnel, expertise, past projects done in similar areas, lab and workshop equipment available for the project.
- ◆ Sign an NDA (non-disclosure agreement).
- ◆ Jointly decide the end objectives, technical specifications, deliverables, completion time, and time schedules.
- ◆ Jointly decide the financials fees and fee payment schedule.
- ◆ Jointly decide on loan and return of any equipment required by the institute collaborator.
- ◆ Jointly decide the terms of transfer of data, knowledge and any other information.
- ◆ Decide on the reporting procedure for project status and progress – format of reports, who makes the reports, who they are sent to, what is the periodicity.
- ◆ Decide the ownership of any intellectual property and patents resulting from the project.
- ◆ Sign a contract that contains details of deliverables, time lines, financials, knowledge transfer and ownership of intellectual property.
- ◆ Decide the team members responsible for the project, both in your company and in the collaborator institute. Ensure that your and your collaborator's team is available for the duration of the project.
- ◆ Decide the leaders of the teams in your company and in the collaborator institute.

### Start the project

- ◆ Make initial payment to the institute collaborator, if any.
- ◆ Transfer equipment to be loaned to the institute collaborator, if any.
- ◆ Transfer all data and knowledge required.
- ◆ Train the institute collaborator's team on any gaps in their knowledge of your products and technologies.
- ◆ Ensure access to information and information systems (like areas of your IT network), if any.

## **Supervise the progress**

- ◆ Jointly monitor the status of the project – technical progress, finances.
- ◆ If there are any changes in the initial technical specifications, document these.
- ◆ If there is going to be a change in the time lines or finances because of change in specifications, non-availability of personnel, or non-availability of equipment, document these, modify the initial contract.
- ◆ Ensure that reporting procedures are followed.

## **Close the project**

- ◆ Test the deliverables – design, prototype, documentation, etc.
- ◆ Do a follow up – evaluate the project's good and bad points, document and communicate them in a constructive manner, both internally and with the collaborator.
- ◆ Study and document any improvements that need to be made in the collaboration procedure for future projects.
- ◆ Store the R&D collaboration project's materials in a secure and systematic way for security, audit trail and legal reasons.