



NEWTICKETT is an enterprise diagnostic tool to develop partnering strategy within, between clusters and between their members. Tailored for Clusters and its members (big companies, SMEs, Start-ups and research organisations), it will help you:

- To develop Cluster collaborative projects by a better Partnering approach
- To identify technology strengths and weaknesses in enterprise
- To sort existing ideas and to generate innovative ones
- To develop and to empower partnering strategy inside clusters and abroad
- To increase quality of local and international innovative partnerships

**Use it freely now through the Enterprise Europe Network!**

The whole Newtickett team wish you plenty of success in your innovative projects and in partnering.

*Newtickett methodology has been co-financed under the 6th Framework Programme for R&D of the European commission DG Enterprise and Industry.*

## How to develop partnering strategy within and outside Clusters






- An overview of the Newtickett experience

Concerned Audience:

- Cluster Managers and Animators
- Enterprise Europe Network advisors
- Local Services Actors to enterprises

## European Partners involved

The 6 partners involved in the Newtickett project who developed this Partnering development tool are the following ones:

	Arist Rhône-Alpes, service de la CRCI Rhône-Alpes (IRC* Sofraa)
	Steinbeis-Europa-Zentrum (IRC* Stuttgart-Erfurt-Zürich)
	Arist CRCI Bourgogne (IRC* Grand Est)
	CESTEC (IRC* Lombardia)
	HELP-FORWARD Network/FORTH (IRC* Help-Forward in Greece)
	ABE-BAO (Brussels-IRC*)

(Note (\*): Innovation Relay Centre (IRC) has been now reorganized and integrated into Enterprise Europe Network)

## Introduction

NEWTICKETT is an enterprise diagnostic tool to develop partnering strategy within, between clusters and between their members. Partnering is recognized by European Union as one of the main axes to boost competitiveness of enterprises, European research centres, and SMEs particularly. Clusters of enterprises, other important European axe of competitiveness, are also taken into account by the Newtickett tool. This one is a full package which allows cluster to facilitate partnering integration and to develop trans-national relationships between the Newtickett expert, the enterprises and the European Network: Enterprise Europe Network.

After two years development, the Newtickett project, co-financed by the European Commission FP6 (6th R&D programme framework), has generated a tool integrating the best enterprises diagnostic practices. This tool was developed from six European partners initiative, acting more than 10 years in the field of Trans-national Technology Transfer within the Innovation Relay Centre network (today merged with the former Euro Info Centres Network to constitute the Enterprise Europe Network, network managed by the EACI, Executive Agency for Competitiveness and Innovation).

The Newtickett tool is composed of five Modules, assisted by an expert in Innovation and Partnership, allowing the enterprise to do auto-evaluation practice on one hand and to define partnering strategy and setup an action plan on the other hand.

The objective of this booklet is to let the consultant knowledgeable about all the necessary elements for the good implementation of Newtickett. Their usage will be indicated on the next pages step by step through a simple fictive case of the method application.

## Team of Newtickett Project



*Newtickett coordination meeting*

### Thanks to Newtickett Partners actors:

#### **CRCI/ARIST Rhône-Alpes:**

Sylvie Marino, Patrice Heyde, Claude Garcin

#### **Steinbeis-Europa-Zentrum:**

Petra Püechner, Teresa Puerta, Hartmut Welck

#### **CRCI ARIST Bourgogne:**

Laurent Volle, Ludovic Denoyelle, Timothée Sylvestre

#### **CESTEC (Lombardia):**

Guido Dominoni, Daniele Villa veronelli, Gabriella Cadeddu, Silvia Corbetta

#### **HELP-FORWARD Network/FORTH:**

Vassilios Tsakalos, Rosa Kardara, Anastasia Constantinou,  
Epaminondas Christophilopoulos

#### **ABE-BAO:**

Jacques Evrard, Manuel Fernandez, Alexandre Bonnyns, Nadine Bettens.

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- CONCLUSION

## Overview of the NEWTICKETT method

First of all let us describe what the word "NEWTICKETT" means. It means "NEW Tools to Improve Cluster Key European Technology Transfer"; let's check word by word the meaning of this new methodology.

### New Tools:

Newtickett is not just a gathering of existing audit tools. It is a well-defined method of auto-auditing, assisted by a Newtickett expert, to have a global view on the partnership strategy. The client company can identify opportunities, the dangers it might face and must be aware of, and finally grab the right partner. "New Tools" is plural because the Newtickett method proposes a wide range of possibilities. It is flexible and can be adapted to any context as explained hereunder.

### Improve:

The primary goal of Newtickett is at the benefit of the client company, which can in this way have a survey and diagnostic of its best-practices and weak points. The final step of Newtickett is then to propose practical actions to improve the partnering strategy of the company in order to boost its competitiveness and market penetration.

### Cluster:

Newtickett is not a tool to use on its own, it is designed to be used in parallel with a close collaboration with company Clusters. It is therefore of the Newtickett expert's responsibility to keep a strong link with the Cluster. Ideally all the client companies which will undergo the Newtickett method will be members of the given Cluster or brought by the Cluster. This aspect has a great importance when it comes to solutions brought by Newtickett to improve the client's competitiveness by partnering. Clusters being a pool of closely-related companies it will be in this context that the client will have to look for rapid answers to its problems, it is therefore of major interest to involve as much as possible the Cluster animators and director.

### Key:

Newtickett is designed to sequentially broaden the discussion to a maximum of key aspects of the given subjects (partnership practices and motivations, Products/Markets matrix, Key Success Factors...) and then to narrow the conclusion to a small and precise aspect, in order to clarify the situation and put priorities before the next step is done. By iteration of this along the different steps, the client entrepreneur can come to a very sharp and precise view of its situation.

### Technology Transfer:

Besides the 5-step method presented in this booklet and the satellite actions taken at Cluster level to foster partnership, the Newtickett package proposes a final tool to be able to best answer the client needs: Technology Transfer. In order to be most efficient in offering this service, the Newtickett expert must be closely linked with the Enterprise Europe Network which provides its services in transnational commercial partner search and technology transfer. If the Newtickett expert is not a member of this European network, additional effort has to be done to work in very close relationship with the local partner of the Enterprise Europe Network. This is a condition of use for a quality and complete method.

Clusters are an effective networking mode at regional, national and international level for enterprises working in a given sector, and a common way to boost innovation and competitiveness. Therefore, developing tools for clusters is a priority identified by the CE to achieve the Lisbon objectives to "make the EU the most dynamic and competitive knowledge-based economy in the world". The Newtickett tools are composed of five stages (also called modules) that can be used together or separately, according to the needs.

Stage 1: Relationship inside the Cluster and discussion on Partnering

Stage 2: Positioning of the entity with regard to Partnering

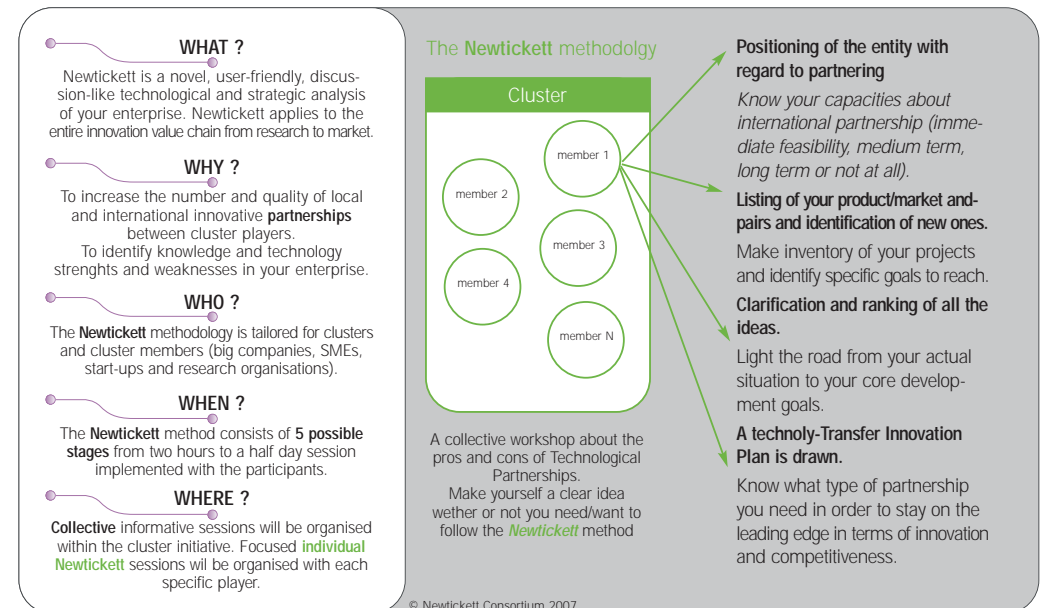
Stage 3: Listing of Product-Service / Market pairs and identification of new ones through technologies portfolio analysis.

Stage 4: Clarification and ranking of all ideas – priorities issue

Stage 5: Drawing of Actions and Technology Transfer Innovation plan.

To stay coherent in the partnering Newtickett initiative, the Newtickett expert will first track down the potential clusters in his region before addressing their members themselves (Enterprises, Research Centers, Laboratories, Organizations, Associations).

Indeed, the purpose of the exercise is to study the place which the company occupies within its local microcosm, in order to detect the gap of improvements according to its strength about local or international partnering and its competitiveness level. So, it is essential to have strong relationships with the cluster responsible.



## Prerequisite

### The Cluster agreement

#### Why an agreement with the cluster?

To work in a professional way with one or several chosen clusters, the notion of partnership or agreement becomes imminent and inevitable, because in this initiative it will be necessary to well define the expectations from each actor. To do it, a simple document was conceived to help in the elaboration of this agreement. And the consultant will take care of filling it together with the cluster manager.

This agreement will allow sparing time, in the relations with the cluster and with its members by sharing the information at the rising and downward levels. It will later facilitate the exchanges not only within the cluster but also at the inter-clusters level: national and trans-national (contacts with other clusters in the same domain, ideally having also involved their members in the Newtikkert practice).

#### Who else to involve?

The involvement of the Enterprise Europe Network via the local official partner is essential to facilitate the international constituent of the initiative and is an indispensable condition for obtaining the license. The body host of the Enterprise Europe Network local office will thus be involved in the implementation and will also be a signatory of the agreement made with target Cluster.

#### Presentation and recruitment for Newtikkert Partnering development

Once this agreement is approved and signed by all the parts, the proposal of partnership development aid in innovative projects can be launched. It has now to be presented to the members of the cluster to raise their awareness on the availability of such a tool and to collect the commitment of the members wanting to undergo a Newtikkert cycle.

It is important, at this stage, that the consultant seizes the opportunity to be presented by the cluster manager to its members. By doing so, he can benefit from this recommendation to speak about Newtikkert and eventually to collectively make a first consciousness-raising about partnership. It is obvious that it is very important also to involve the person in charge of the cluster which will be appointed as the contact person in any Newtikkert activity.

#### Example of Agreement

You will find hereafter a guide, in the form of a check list: you could follow to write a common agreement with the target Cluster and Enterprise Europe Network.

## NEWTICKETT CLUSTER COOPERATION AGREEMENT (Term Sheet)

Text colours meaning: *Parts to be included in all cooperation agreements*  
*Optional parts according to individual needs and preferences of partners/ clusters*

I. Introductory Part	
Purpose and context	The agreement aims at formalising the intention of the cluster to apply the NEWTICKETT methodology.
	Summary of NEWTICKETT project objectives.
II. Parties	
NEWTICKETT Partner	Synoptic presentation of partner's identity/activities/ role in general.
Co-operating cluster	Synoptic presentation of the cooperating cluster's identity/activities.
	List/ annex of cluster members participating in the cluster. Definition of cluster members to apply/ test the methodology (Sample depends on cluster size).
Benefits to parties (esp. cluster)	Description of synergies and benefits to the cluster, resulting from the cooperation with the NEWTICKETT partner.
III. Core	
Agreed Actions	Cluster members to apply and evaluate the NEWTICKETT methodology - Cluster members to provide feedback/ evaluation of tools, against criteria.
	i. Inventory of NEWTICKETT tools (parts of the methodology) made available, for cluster members to select (selection from list with tick boxes) ii. Complementary tools (developed outside NEWTICKETT) accessible from cluster members (e.g. other IRCnet tools, partners tools, etc). iii. Pre-definition of certain preliminary criteria against which cluster members are expected to provide feedback/ evaluation.
	Working procedures in more detail
IV. Confidentiality	
	Input from cluster members to be kept confidential
	Summarised results (feedback/evaluation of tools by cluster members) are publishable
V. Other clauses	
Communication, promotion etc	Definition of persons responsible for communication between the two parties and execution of the agreed actions
	Specifications on the use of cluster and NEWTICKETT logos, promotion of cluster activities via NEWTICKETT promotional material, etc.
Duration	Duration of the agreement
VI. Signatures	

## Module 1

### Awareness and confidence in Partnership

#### Objective:

Breaking the ice, raising consciousness to Partnering and presenting the supporting tool.

#### Means:

During a cluster meeting, a general presentation is done on Newtackett method and a discussion is conducted, involving mainly the audience, regarding benefits and brakes of Partnering.

#### Output for the companies:

*Have a clear idea whether or not you need/want to follow the NewTackett method.*

After having gained the involvement of the chosen Cluster(s), the first step in the Newtackett practice will be to organise, together with the Cluster animator, an event where all the Cluster members will be invited, and where you will be able to present the Newtackett tool and gather the subscription of the interested companies.

This event (Module1) will be presented as a networking event with a workshop discussion on "Awareness and confidence in partnership". It may last from a couple of hours to half a day (in which case you should foresee other activities, like more speakers, the "module 2 collective" option proposed hereafter, or any option of your own you should find suitable), and can be organised inside a greater event (Cluster meeting, brokerage event, business fair...) or stand-alone.

The Module 1 event being oriented through Cluster members it would obviously be much more effective if advertised and co-organised by the Cluster animators, and placed accordingly with the Cluster's calendar of events and meetings.

The event in itself is supposed to be a discussion with the audience, not an ex-cathedra presentation. This exercise is rather difficult, especially in its beginning. People are used to come and receive information, and participation is not straightforward in their behaviour, this can lead to long awkward silences and loss of attention. The Newtackett expert has a very important task here in launching the debate and not letting the discussion fade out. Several tricks are proposed here to ease your task, but, as usual, feel free to organise your module 1 event as best suits the context and your capabilities.

To know so-to-say "how to start and when to stop", a planning of the event is a very good tool to have at hand, a proposed typical planning follows:

#### The different steps of module 1:

- Presentations of the actors: Cluster animators with a few words on the cluster, Enterprise Europe Network partner if present, Newtackett expert (you)
- Background: A few words on the organisation of the event, on why they are here, what is the agenda, present the speakers, prepare them to talk during the discussion...
- Testimonies of partnerships: invite 3 speakers who would present their company and talk about their partnership, past or present. Ideally Cluster members identified by the Cluster animator or old Newtackett/Enterprise Europe Network clients.
- Discussion: See below for the description of this part.
- Presentation of Newtackett: and the modules, so that they know what they subscribe to (see example presentation in Annexes )
- Modules registration
- Networking cocktail

#### Good practices:

Concerning the discussion there are many ways of conducting it, depending on the context and the culture of the participants. In general manner, the aim is to make the audience talk about partnership, about the opportunities and benefits it can bring, but also about the risks inherent with partnerships, about the fears and brakes people see in building a partnership. You can find in the associated tools a PowerPoint file that will lead the discussion on talking about several aspects or different types of partnership. We advise the Newtackett expert to use this presentation as a support to the discussion. It can be projected for everyone to see it. Do not use it as a standard presentation but rather going back and forth during the discussion to bring the debate on a specific aspect you want to cover or, reactively, to show where the discussion is going (and it should not go linearly but rather jump from aspect to aspect and then back in line with the examples, testimonies and reactions of the audience). You can fill in real time the list of benefits and brakes to keep track of what is said (or have someone to do it), whether this editing of the presentation is shown live to the audience or written apart and then shown or sent as a feedback report about the event is your call.

After the discussion the conclusion should arise from the audience, the expert should sum up what was said and let the audience conclude. As a reaction to this conclusion the expert will then link up to the next phase and present the Newtackett practice to raise the will to participate among the attendees. The transition between the discussion and the presentation will be eased by the conclusion, presenting Newtackett as a tool to have a better and clearer idea about whether and how the enterprise has opportunities to grasp by taking the road of partnership, and how to lit this road and know what type of partnership best fits the entrepreneur's short-term strategy.

Finally, you should not let the attendees leave the room before having answered to the question "are you interested in continuing the Newtackett exercise with the individual Modules?", and if yes having left their contact details.

#### Variants:

- Module 1 can be run either collectively (about 1h00) or individually (15mn)
- Module 1 can be grouped with Module 2 pre-diagnostic: in collective mode (1h to 1h30) or in individual mode (30mn)
- Module 1 can be grouped with Module 2 Pre-diagnostic and Diagnostic (rather individual case)

## Example of a typical case (M1): Benefits and Brakes in Partnering

E, an enterprise acting for 10 years in energy saving and sustainable environment, employs about 80 persons. Full of ideas and projects in its pipeline, the manager has difficulties to sort them, to set priorities. The enterprise "E" is in a critical phase because the competitiveness is sharp and differentiating is a question of survival. But how to be innovative, successful and strong enough alone?

The manager is anxious because he did not have time to look after recent technologies in his domain and he fears to be outrun by his competitors. Due to an unlucky experience, four years ago, he lost confidence in partnering and is now rather closed in the matter.

Participation to the Newtickett workshop on partnership gave him the opportunity to speak and to exchange on his vision of partnership with other entrepreneurs. Sharing with them good and bad experiences allowed him to have a better picture of why his last experience went wrong and restored him enough confidence in partnership to be willing to undergo the auto-evaluation of his partnership strategy and practices.

Other entrepreneurs did also express their interest in the Newtickett method, whether they had no experience in partnership at all and are willing to avoid mistakes and bad moves or had a good experience and are willing to identify other opportunities he could grab.

All these entrepreneurs filled in the subscription form before leaving the workshop and a planning for the implementation of the 2nd module of Newtickett is under construction. Several dates for the next step were proposed to the clients (with the adequate persons in Cc: Cluster manager, Enterprise Europe Network contact person...).

Hereafter are the minutes of the workshop, where benefits and brakes of partnership were discussed and listed by the audience. Then, the consultant showed where the brakes can find solutions and answers through the different Newtickett modules.

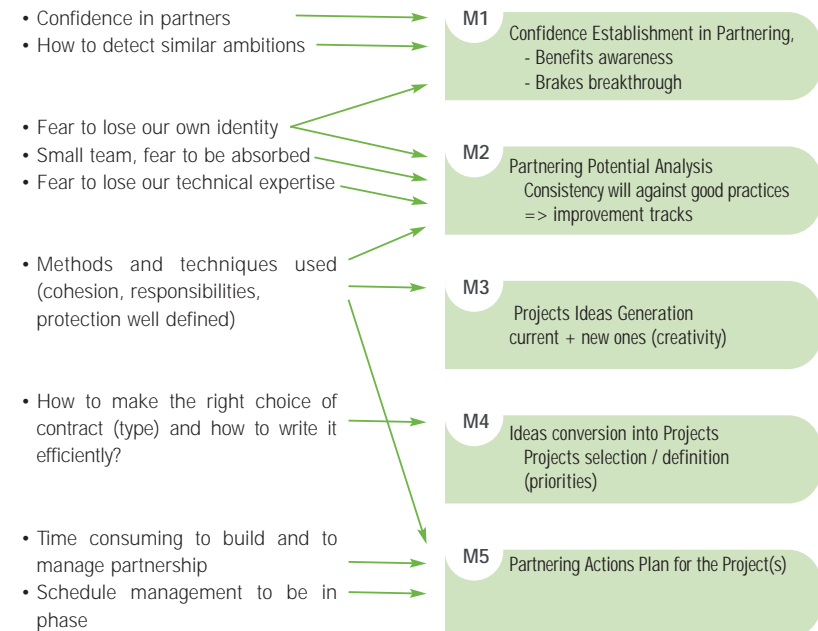
### PARTNERING BENEFITS

- It brings support, complementary elements, links with other industries
- Allows to build a network of professionals
- Bi-directional exchanges on know-how and experiences (but by knowing giving first)
- Partnership enlarged to Europe
- It allows to increase market zone by developing new ones
- It forces to do technology watch, and customers base analysis
- It helps to empower the branding image
- Win-win
- It allows to mutualize the resources while keeping our own identity
- It allows to reduce time, costs and risks in development
- It brings more strength against the competition
- ....

### BRAKES TO PARTNERSHIP

- Confidence in partners
- Methods and techniques used (cohesion, responsibilities, protection well defined)
- How to detect similar ambitions
- Schedule management to be in phase
- How to make the right choice of contract (type) and how to write it efficiently?
- Fear to lose our own identity
- Fear to lose our technical expertise
- Small team, fear to be absorbed
- Time consuming to build and to manage partnership
- ...

### NEWTICKETT PROGRAMME: SUPPORT TO PARTNERING



## Module 2

### Diagnosis and positioning

#### Objective:

To let the enterprise do an auto-evaluation via a pre-diagnostic and/or diagnostic that gives it a positioning reference in terms of Partnering potential.

#### Means:

With the support of a worksheet, best practices are described to the client entrepreneur who then has to evaluate (with a score from 0 to 4) whether and how this practice is implemented in his company. The same is done with the motivations of the company regarding partnership and a first conclusion is automatically deduced.

#### Output for the companies

To know your capacities about partnership (feasibility at once, medium term, long term or not at all).

#### Process / Tools:

- Module 2 **PartnerScan Pre-diagnostic**: targeted for collective mode when several entities meet together (5 questions to be ticked + 3 open questions)
- Module 2 **PartnerScan Diagnostic**: mainly for individual mode. (4 parts)

Although this module can be done in a collective form (see dedicated paragraph), it is more effective when the entrepreneur can freely speak about his/her strategies and practices. This situation is far better achieved in individual work sessions where only trusted persons are present with the entrepreneur (employees of the enterprise, Newticket expert, Cluster animator, Enterprise Europe Network contact person...), we therefore advise the Newticket expert to invite only persons that have been acknowledged by the client entrepreneur and to prepare a Non-disclosure agreement and have it signed by all the stakeholders before the work session begins. The Module 2 can be done at any place, but it is warmly recommended, for client's comfort reasons, to have it take place at the client's premises.

#### Good practices

It is a good idea to perform this module at the client's premises. This may allow to visit the company and to better know the enterprise environment.  
To print questions and note marks as backup in order to keep trace  
To print and to give participants the notation levels for answering 0 to 4.

#### Variants

- Either Module 2 Pre-diagnostic or Module 2 PartnerScan Diagnostic can be run standalone
- Module 2 Pre-diagnostic can also be used jointly with module 1 (collective or individual)
- Module 1 + Module 2 Pre-diagnostic + Module 2 PartnerScan Diagnostic can be run sequentially in one workshop (3 hrs about in individual mode)

### Example of a typical case (M2): Pre-Diagnostic

The entrepreneurs have completed this short page questionnaire during the "Module 1" workshop, and statistics are now drawn and sent to the participants, the cluster manager and the Enterprise Europe Network contact person. These statistics are anonymous and give good information on the composition of the cluster, in term of the type of partnership its members are needing, in term of what geographical coverage is looked for and evaluating the experience in partnership of the cluster members and what services they are waiting from their cluster participation.

#### PartnerScan Pre-diagnostic

Enterprise name (optional): E (tick the correct answer please)

#### 1. In which type of partnership are you interested?

- |   |                                     |
|---|-------------------------------------|
| a) Market prospection                       | <input checked="" type="checkbox"/> |
| b) Distribution                             | <input checked="" type="checkbox"/> |
| c) Purchase or Logistic mutualization       | <input type="checkbox"/>            |
| d) Common manufacture                       | <input checked="" type="checkbox"/> |
| e) Common Research & Development            | <input checked="" type="checkbox"/> |
| f) Technological subcontracting             | <input checked="" type="checkbox"/> |
| g) Selling or buying licences and "kow-how" | <input type="checkbox"/> Later      |

#### 2. In which area are you searching a partner?

- |                           |                                     |
|---------------------------|-------------------------------------|
| h) Regional               | <input checked="" type="checkbox"/> |
| i) National               | <input checked="" type="checkbox"/> |
| j) European               | <input checked="" type="checkbox"/> |
| k) Asia                   | <input type="checkbox"/>            |
| l) North or South America | <input type="checkbox"/>            |
| m) PECO                   | <input type="checkbox"/>            |
| n) Africa                 | <input checked="" type="checkbox"/> |

#### 3. In which type of partner are you interested?

- |                          |                                     |
|--------------------------|-------------------------------------|
| o) SME                   | <input checked="" type="checkbox"/> |
| p) Big companies         | <input checked="" type="checkbox"/> |
| q) Research institutions | <input checked="" type="checkbox"/> |

#### 4. When do you expect to be able to begin your partnership?

- |                |                                     |
|----------------|-------------------------------------|
| r) Immediately | <input checked="" type="checkbox"/> |
| s) 1 year      | <input checked="" type="checkbox"/> |
| t) 2 years     | <input type="checkbox"/>            |
| u) 3 years     | <input type="checkbox"/>            |

#### 5. How many partnerships have you already realized?

- |                |                                     |
|----------------|-------------------------------------|
| v) 0           | <input type="checkbox"/>            |
| w) 1           | <input type="checkbox"/>            |
| x) 2 to 5      | <input checked="" type="checkbox"/> |
| y) more than 5 | <input type="checkbox"/>            |

**6. What is the most difficult for you in setting up a partnership?**

Confidence and capacity to surmount brakes - Legal aspects - Drafting the contract - Getting common objectives while keeping independence - Technological capacity - Skills and market analysis - Delays - Quality - Projects management.

**7. What do you need to set up your partnership?**

Means to look for and to find the good partner - Institutional support - Legal and administrative assistance - To develop activities, the customer base and to get the funding.

**8. What do you expect from your cluster?**

Administrative help - legal support - Complementary means (mutualisation) - To find partners within the cluster - Develop common projects - Knowledge sharing - prescription - Synergy within the cluster and with other clusters support of influence with regard to the Poles of competitiveness.

—○ Example of a typical case (M2): Diagnosis

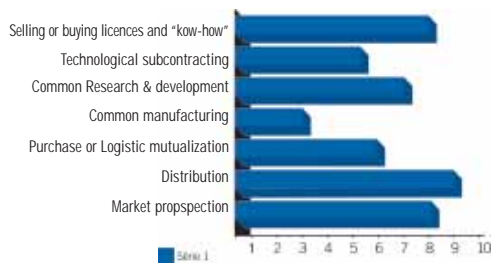
**Readiness:** Before the session, the consultant has prepared on one hand, the necessary files on his PC, and on the other hand, the set of cards for the questions, and a handout with the explanation of the evaluation levels 0 to 4. The Newtackett session begins with a small introduction where the manager speaks firstly about his company and introduces it to the participants (all the participants having been agreed by the client and having signed a Non-Disclosure Agreement).

The consultant then gives the manager the PartnerScan set of cards (all at once or at each section starting). The manager answers the questions according to his own vision and perception by setting a mark from 0 to 4.

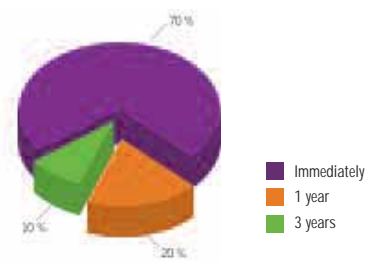
Answers to questions (by levels from 0 to 4)	
0	No, we don't agree and this does not apply to us.
1	No, but this may have an interest for us.
2	We apply the proposal partially or occasionally.
3	We apply regularly and quite fully this proposal.
4	We apply the proposal with willingness > by having it know internally > and by being able to measure the efficiency, the impact or the benefits.

**SYNTHESIS AND STATISTICS ISSUED FROM THE PRE-DIAGNOSTIC SHEETS**

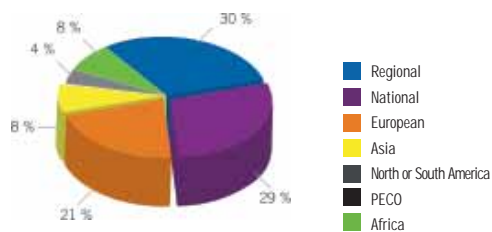
**Type of needed partnerships**



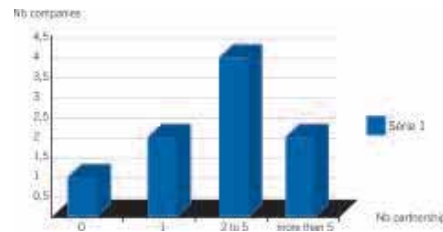
**Expected time to start partnership**



**Aera of partnership**



**Average number of realized partnership**



The first part of the Diagnosis PartnerScan allows to evaluate the practices and habits of the enterprise that have an impact on its partnership strategy. These are seen through the three following angles: Markets/Customers/Distribution, R&D and Production / Suppliers. Results are automatically compiled and evaluated thematically as the "thematic level of practices" that will be compared to the motivations.

**Market / Clients / Distribution**

We get information regularly about the marketing strategies of our competitors.

**Research & Development**

During conceptual definitions of new products or services, we pay attention on a structured way to the needed processes and support technologies as well as to the necessary internal or external resources.

**Production & Suppliers**

We detect in an organized way the technical tendencies and the evolution of the uses likely to influence the characteristics of our products or provisions of services.

The second part of the Diagnosis PartnerScan allows the manager to auto-evaluate his will in term of partnering, according to partnership types. The results ("leader motivations") are compared to his practices in the auto-evaluation histogram. Then, a synthesis shows the gaps between the practices and the motivations according to 3 different colours (for important, medium, small gaps).

D. Partnership opportunity	Quo.	Graph	Gap
D1. We are interested in a common market research with another partner.	4		-2,2
D2. We are interested in a crossed product distribution.	3		-1,2
D3. We plan to find a partner to group purchases or logistic.	1		0,8
D4. We are interesting in licensing or acquiring a know-how.	4		-1,6
D5. We are interesting in involving external partners in our design process.	3		-0,6
D6. We plan to sub-contract "key" technology parts four our products.	1		1,6
D7. We are interested by a common manufacture of products with another partner.	3		-0,4

<b>Graph legend</b>	<b>Deviations legend</b>
Thematic level of practices	Important gap = strong differences between practices level and motivations
Leader motivations	Medium Gap = acceptable risk if strong motivations
	Small or positive gap = consistency between practices level and motivations

Automatic Results

Suggested partnerships: Potential	
P1. Commercial partnership for the exploration of market	Likely
P2. Commercial partnership for distribution	Likely
P3. Industrial partnership for purchase/logistic mutualisation	Risk
P4. Industrial partnership for a common manufacture	OK
P5. Technological partnership for research & development	Likely
P6. Technological partnership for subcontracting	Risk
P7. Technological partnership for licences and "know-how"	Likely

The tool sets an indication on the risk (risk, likely, ok) associated to each type of partnership. This is just an indication, and does not give rise to any advice on a given partnership, except to check the practices that were poorly evaluated and try to work on them, especially if an important partnership is flagged risky.

To rank the importance of the partnerships, the manager is asked to put them in an "Impact versus Difficulty-of-implementation" matrix. The tool automatically keeps the ones flagged "ok" and the manager may choose among the other the ones he wants to keep.

E. Suggested partnerships

Potential:

P4. Industrial partnership for a common manufacture

**Other suggested partnerships:**

- P1. Commercial partnership for the exploration of market
- P2. Commercial partnership for distribution
- P5. Technological partnership for research & development
- P6. Technological partnership for subcontracting
- P7. Technological partnership for licences and "know-how"

Partnership ranking

Fill the matrix below with the potential partnerships:

Impact

Strong	P4	P1	P5
Medium		P7 P2	P6
Low			

Low Medium Strong Difficulties

This gives the manager a first status issued from his perception, by showing potential risks or particular attention according to the foreseen partnership types.

Then, he is asked to make an attempt of his partnership key points, by answering the following questions:

## PROJECT DEFINITION

*(The manager tried to define the main following topics about the Partnership P4 that he selected by answering the following questions)*

### F1. Precise the goal and the location of your partnership project:

Goal: We look for a partner to make an innovative and reliable product by means of a technical expertise with targets: Sustainable Energy and of energy saving products (for private individuals and SME / SMI) based in Europe

Location: Europe

### F2. What are the types of agreements needed?

Joint participation - collective advertising - crossed distribution

### F3. What type of partner is desired?

SME/SMI - Research centre - Large Group

### F4. What are the criteria of selection of the required partner?

Expertise in renewable Energy – Fame  
Confidentiality  
Exchanges and complementary  
Dedicated project manager  
Mutual Training

### F5. What are the organisation type, model and culture of the required partner?

International culture - Flexibility - Ability to react - Innovation - Little hierarchical  
- Interactivity - Synergy

### F6. What is the desired model of organization of the common development?

Centralized for the research-production part

### F7. How to finance the partnership?

Financing according to property splitting - costs-sharing.

### F8. What are the deadlines and objectives of the partnership?

Partnership to be established (in June, 2008 - Starting up) - 1st assessment (3 months later) then every 6 months.

### F9. What are the advantages for our partners to be associated with us?

Our Knowledge, fame, knowledge of the clientele, network of distribution - Management of projects-

**This lets the manager recover his confidence in partnering. Now, he is interested in looking for new ideas and in sorting those ones he had previously to really turn them into projects.**

## Module 3 Collection and generation of project ideas

### Objective:

In a first part of module 3, to bring the enterprise manager to build clear and complete description of his Product-Service / Market pairs, to focus on main key success factors that are associated to a selected pair and on the technologies used in it, impacting the Key Success Factors. Opportunity is given to auto-evaluate his technology positioning in terms of competitive impact and control level.

In a second part, a brainstorming session based on the output of the first part should allow him to generate new innovative ideas in addition to his current ones.

### Means:

With the support of a worksheet, the client entrepreneur is invited to make a complete inventory of the elements constituting his company's technology portfolio (Product/market pairs, Key Success Factors, Technologies mastered, technologies needed...) in order to prepare the brainstorming session that will be focused on improving the existing situation.

### Output for the companies:

To Make an inventory of your projects and identify some goals to reach.

### Process:

Part 1: Preparing the Brainstorming session.

With the support of the worksheet provided, let the client entrepreneur list all the products and services his company offers and the markets that he covers and place them in the Product/Market matrix. You can also decide with the client to list here future products/services and markets not covered but interesting to consider. Let him list the importance (expressed in absolute and relative values) of each product and market and then fill the matrix with the cross-linking information (i.e. by multiplying the relative values) and express for each box if the tendency is raising or falling (with the arrows). Begin a discussion on the overall matrix (are there holes? Is the picture well-balanced?) and chose one product/market pair that the client entrepreneur wants/needs to invest efforts in.

List with the client entrepreneur the Key Success Factors that influence the success of the penetration of this product/service in that given market (keep a wide open approach, listing as many KSF as you/the client think useful, even if the influence is not strong, these will be sorted afterwards but can prove useful to investigate). Rate the influence that each Key Success Factors has on the given M/P pair with a number ranging from 1 (weak or indirect influence) to 4 (close and strong influence).

Once all the Key Success Factors have been listed, the client entrepreneur should estimate at which level its company masters each factor, to have an idea of its strengths and weaknesses, by rating them from 1 to 4 (you should write in the appropriate box directly the value multiplied by the influence importance of this KSF rated previously). This exercise can be repeated by evaluating other entities (mainly competitors) with how much the entrepreneur thinks his competitors master the Key Success Factors of importance.

To narrow the discussion before the next step is taken, the client entrepreneur should now chose among all the KSF listed a maximum of five on which the investigation will continue. This should not necessarily be the ones with the higher influence, but the ones the client wished to work on (because the enterprise does not master it well enough, because the competitors are strong in it, because he is already working on it without success...).

The next step is to let the entrepreneur list all the technologies he has in-house. This should be viewed in a very large sense, not only considering state-of-the art technology, but considering all kinds of technologies; technologies of products, but also of production and organisational technologies (like a website, key human resources for IPR issues or communication, advertisement...). Once listed, the entrepreneur has to rank their influence on the Key Success Factors chosen (and written in abscise of the table) from 0 to 10. This ranks the importance of the listed technologies by giving them an importance factor A (core), B (major) or C (minor).

The “core” and “major” technologies shall now be placed in the matrix defining their competitiveness impact and how much the enterprise masters it. This will give you possible actions to take with this technology, and this provides the starting material for the brainstorming session.

**Part 2: Conducting the brainstorming session**

You should help yourself conducting the brainstorming session with all the advices and materials available on the internet that you consider useful.

**Good practices:**

Ask the client entrepreneur to fill in a prerequisite form (listing the products, services and markets covered) and to already think about Key Success Factors and the technologies he has in-house. This will save a considerable amount of time.

Allow as many persons as needed to conduct the brainstorming (with the approval of the client, or even better, on his initiative), the more brains are in the storm, the better.

This module is quite consequent and dense, and depending on how much the participants are prepared to this exercise, may require 2 or 3 sessions to progress in this step 3. Sometimes, the manager takes this opportunity to share information and vision among his key responsible persons by using Newtackett method as a communication tool within his enterprise.

**Variants:**

The second part of module 3 (creativity part) can be jointed to Module 4 when this creativity part is shorter because numerous ideas are already existing.

—○ Example case (M3): 2 main parts

**Part 1** (2hrs to 3hrs): 4 elements from Markets / Products-Services pairs to Technologies portfolio Matrix

**Part 2** (1hrs to 3hrs): Creativity (collection and ideas generation)

**Module 3 part 1:** Markets /Products-Services pairs

In this session, E manager has defined his Markets / Products-Services matrix. He listed 5 markets segments, 3 main products and 2 services. He gave also the percentages for all of them and consequently got them for the different M/P-S pairs.

**ENTERPRISE NAME :** Enterprise E  
**Date :** 12/03/2008

**Market / Products (or services) Pairs matrix** (Figures, Data, sources: from enterprise mentionned above.)

products/ Services	P1 24 % (//other PS)	P2 35 %	P3 25 %	S1 9 %	S2 7 %
Markets (segments)					
<b>M1 :</b> Market contribution against the Total Sales (TS): 41 %	<b>M1 : / P1 Pair</b> S Turnover = % against Tot.Mark sales = 8 % Trends =	<b>M1 : / P2 Pair</b> S Turnover = % against Tot.Mark sales = 18 % Trends =	<b>M1 : / P3 Pair</b> S Turnover = % against Tot.Mark sales = 13 % Trends =		<b>M1 : / S2 Pair</b> S Turnover = % against Tot.Mark sales = 2 % Trends =
<b>M2 :</b> Market contribution against the Total Sales (TS): 21 %	<b>M2 : / P1 Pair</b> S Turnover = % against Tot.Mark sales = 6 % Trends =	<b>M2 : / P3 Pair</b> S Turnover = % against Tot.Mark sales = 8 % Trends =	<b>M2 : / P3 Pair</b> S Turnover = % against Tot.Mark sales = 7 % Trends =		
<b>M3 :</b> Market contribution against the Total Sales (TS): 29 %	<b>M3 : / P1 Pair</b> S Turnover = % against Tot.Mark sales = 10 % Trends =	<b>M3 : / P2 Pair</b> S Turnover = % against Tot.Mark sales = 9 % Trends =	<b>M3 : / P3 Pair</b> S Turnover = % against Tot.Mark sales = 5 % Trends =		<b>M3 : / S2 Pair</b> S Turnover = % against Tot.Mark sales = 5 % Trends =
<b>M4 :</b> Market contribution against the Total Sales (TS): 9 %				<b>M4 : / P1 Pair</b> S Turnover = % against Tot.Mark sales = 9 % Trends =	

**Outcome:** 1 Market/Product Pair chosen (against high innovation and partnership potential)

M3/P2&P3

**Reasons of this M/P pair choice :**

Market sector to be developed for us, by innovating in these domains

By setting the trends, he saw equally that he could better develop the pairs M3/P2 and M3/P3. So he retained the following grouped pairs: M3 / P2-P3.

### Module 3 part 1: Key Success Factors and competition analysis

Then, he tried to list and to analyze the main Key Success Factors (KSF) for this pair as on the next table considering his own control and comparing to two of his competitors.

**ENTERPRISE NAME : Enterprise E**  
Date : 105/03/2008

**Keys Success Factors(KSF) for the selected M/P Pair** (Figures, Data, sources: from enterprise mentioned above.

**Market / Products Pairs chosen : M3 / P2 & P3**

Keys Succes Factor for this pair	Weights - Importance given to KSF for this MP Pair				Control level from the Enterprise and its Competitors for each main KSF			
	Weak		Strong		My Enterprise	Competitors		
	1	2	3	4	Enterprise E	A (X1)	B (X2)	C (name)
ksf A	4				8	8	13	0
ksf B	3				9	6	9	
ksf C	4				12	12	9	
ksf D	3				9	9	6	
ksf E	4				12	8	16	
ksf F	2				4	6	6	
ksf G	3				9	6	6	
ksf H	4				8	8	8	
ksf I	3				12	6	12	
	<b>TOTAL</b>				<b>83</b>	<b>69</b>	<b>85</b>	<b>0</b>

Outcome :

- 1) These figures allow to check the Key Success Factors relevance and the enterprise positioning against the competitors, when inferior positioned, this will also allow to enlighten the difficulties met.
- 2) This allows to range Key Factors by decreasing order to extract the 5 most important ones .

5 KSF ranged by decreasing order	Importance weight
ksf C	4
ksf E	4
ksf H	4
ksf A	4
ksf I	3

This was a good opportunity to see where some improvements could be performed.

To be ready in the next session, E manager had listed in preparation, all the technologies used in his products/services, in their productions, and at the organisation level. This will allow him to measure their impact on the KSF.



Module 3 part 1 (continued):  
Technologies impact on Key Success Factors and technologies classification

At the next step, he answered the question: how much the different technologies (of products, Production, Organization) can impact these KSF. Sometimes, some technologies mentioned are not technologies as such but rather a technical line with a technology behind. Generally it is sufficient when this technology is key or basic; it may not be the case in case of Leading Edge or Emergent Technologies as more accuracy may be needed when research centers are involved.

ENTERPRISE NAME : Enterprise E

Date : 05/03/2008

Technologies List & Classification against main Key Success Factors (KSF) (Figures, Data, sources: from enterprise mentioned above)

Chosen Market / Products Pairs chosen : M3 / P2&P3

Product Technologies	KSF 1		KSF 2		KSF 3		KSF 4		KSF 5		TOTAL Weighted	Importance class of the technologies according to their impact on the M/P pair A = Core B = Major C = Minor	
	(0-10)	Weighted	(0-10)	Weighted	(0-10)	Weighted	(0-10)	Weighted	(0-10)	Weighted			
	ksf C	ksf E	ksf H	ksf A	ksf I								
	4	4	4	4	3								
T1	10	40	7	28	4	16	8	32	6	18	134	A	2
T2	10	40	7	28	4	16	8	32	6	21	137	A	1
T3	10	40	6	24	4	16	2	8	7	21	109	B	5
T4	3	12	8	3	12	3	12	2	6	50	50	C	
T5	6	24	2	8	2	8	9	36	10	20	106	B	6
T6	0	0	0	0	0	0	7	28	7	21	49	C	
T7	4	16	2	8	4	16	8	32	8	24	96	B	8
	0	0	0	0	0	0	0	0	0	0	0	C	
Production Technologies													
T8	2	8	2	8	2	10	40	10	30		94	B	9
T9	7	28	4	16	5	20	9	36	8	24	124	A	4
T10	8	32	2	8	6	24	2	8	7	21	93	B	10
T11	4	16	2	8	1	4	2	8	4	12	48	C	
T12	6	24	3	12	5	20	1	4	3	9	69	B	11
	0	0	0	0	0	0	0	0	0	0	0	C	
Organisation Technologies													
T13	4	16	8	32	0	0	0	0	0	48	48	C	
T14	2	8	10	40	5	20	5	20	7	21	109	B	5
T15	6	24	4	16	8	32	5	20	2	6	98	B	7
16	9	36	3	12	10	40	6	24	6	18	130	A	3

Depending on the total impact mark, the tool classified the listed technologies according to 3 classes with the idea to only keep the A (Core) and B (Major) ones to set them into the portfolio technologies matrix.

Module 3 part 1:  
Technologies Portfolio Matrix (Competitive Impact and Technology control)

This matrix classifies the technologies in the portfolio regarding their evolution competitive impact (Emergent, Leading edge, Key or Basic) and the control the enterprise (or its partners) has on it (Strong, Medium, Weak).

ENTERPRISE NAME : Enterprise E

Date : 05/03/2008

Chosen Market / Products Pairs: M3/P2&P3

Technologies (Know-How) Portfolio Matrix (TPM): Competitive Impact against Technology control level  
(Figures, Data, sources: from enterprise mentioned above.)

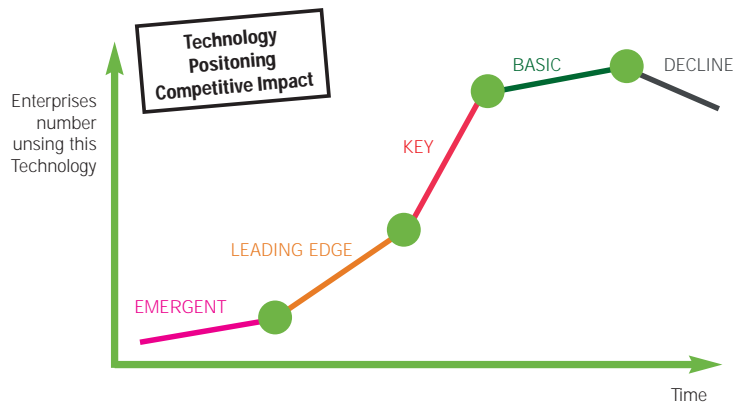
Enterprise position Technology control	Technology evolution Competitive Impact			
	EMERGENT	LEADING EDGE	KEY	BASIC
STRONG		T1	T 16 T14	T8 T10
MEDIUM		T2	T9 T3 T5	T7
WEAK			T16	

E manager found this matrix helpful as he got a status on his capacity in terms of differentiation (the maximum is on the two first columns) and can now identify needed improvements in terms of technology control (mainly on medium and weak lines) by himself or via partnerships.

This table gives him a reference at the time being and he can see the evolution in the future by doing this exercise again. The next picture is a help for the understanding of the matrix and proposes directions of improvement.

Module 3 part 1 (continued)  
**MATRIX VOCABULARY DEFINITION**

This matrix classifies the technologies in the portfolio regarding their evolution competitive impact (Emergent, Leading edge, Key or Basic) and the control the enterprise (or its partners) has on it (Strong, Medium, Weak).



Definitions	
<b>Technology Competitive Impact</b>	The technology competitive impact is an environment factor which escapes the enterprise but this one can try to take advantage from it by controlling it.
<b>BASIC Technology:</b>	Are essential for carrying out the activity, they are largely exploited by the company and its competitors and in his way by has little competitive impact. Although it is indispensable to control them, no competitive advantage can be expected.
<b>KEY Technology:</b>	Are currently being exploited by the company and have a strong capacity of impact because their control results the possibility of differentiation in the heart of the industry.
<b>LEADING EDGE Technology:</b>	Are being testing by certain competitors and offer a strong potential for differentiation. They pattern the future of the enterprise.
<b>EMERGENT Technology:</b>	Are at the research stage or testing in other industries. Their potential for differentiation is uncertain but promising.

Module 3 part 1 (continued)

Definitions	
<b>Technology Control Level</b>	<p>The degree of control of the technologies can be high, average or weak. The degree of control of the company reflects their ability to implement the technology on the one hand and make it to evolve on the other. Technology can be controlled internally or controlled by a supplier as in the case of a buy-in component or by a partner as in the case of distribution by an intermediary.</p> <p>The link between the company and its supplier will be considered as strong, if it has a real power over it, that means if the company can really influence the technology development, the transfer price of its supplies, or by default to be able to change partners.</p> <p>External recognition of the company or of the supplier for its technology expertise is a measure of the competitive positioning on the considered technology. The allocation of specific resources in terms of people or means is a third element of valuation of the degree of control of the technology.</p>
<b>Possible actions of management by Technology and according to their position on the matrix.</b>	
<b>D: Dispose of</b>	To transfer all or part of the present technology to some 3rd-party in return for financing or cross transfer, in particular to some 3rd party operating on different product / market pairing, not interested in the business and for which the technology is leading edge or key.
<b>E: Enrich</b>	Make sure of growing the present capability or at least avoiding its devaluation. This can be done through own development, partnership or acquisition.
<b>O: Optimise</b>	To be concerned always to make the most of what we have as technology and its different components to grow its control.
<b>P: Protect</b>	Protect against each eventuality whether external (competitive factors) or internal (careless management of technical resources) which can undermine the integrity of the technology portfolio, but equally protect it so as not to miss the benefit of optimising it.
<b>S: Scan</b>	Assuring a watching brief: namely acquiring environmental intelligence so as to detect strong or weak signals which would indicate both threats and opportunities.
<b>V: Add Value to..</b>	To research all the possible applications of the technology already in place: in particular to apply it to new products and/or to new markets. This value adding process can be driven internally or externally.

	Emergent	Leading edge	Key	Basic
Strong	P,O	P,O,V	P,O,V	V,D
Medium				
Weak	S,E	S,E	E	E

Depending on the total impact mark, the tool classified the listed technologies according to 3 classes with the idea to only keep the A (Core) and B (Major) ones to set them into the portfolio technologies matrix.

## Module 3 part 2: Creativity (Collection and generation of ideas)

These different analysis, helped him to enter the next phase, the creativity phase, with plenty of key points and innovative ideas.

The most pertinent ones were selected to be evaluated during the next step, module 4.

## Module 4 Conversion of ideas to project

### Objective:

To set priorities on the ideas according to three main parameters: the innovation degree, the partnership orientation, and the market attractiveness, and to transform the main ideas into projects by defining a first set of elements.

### Means:

With the support of a worksheet, evaluate the suitability and appropriateness of the project ideas born during the last module. By ranking them, choose or up to 3 priorities maximum in order to concentrate instead of diluting the effort.

### Output for the companies:

*To light the road from your actual situation to your main development goals.*

### Good practices:

At this stage, either propose exact Technology Offers/Technology Request corresponding to its needs or give a set of possible.

### Variants:

- Module 4 can be coupled with the second part of module 3 (creativity part) (1 workshop about 3h)
- Module 4 can also be coupled with module 5 (1 workshop about 3h)

### Definitions of (E/I/F) method to measure the Innovation degree

Experience (E)	Induction on the users against the life cycle of the product / service - high criteria of the experience change in the product / service usage. Does this new product/service make users (actors) change of experience?
Identifiable (I)	That means elements awareness, easy to remember for the customers (distributors, buyers, users, suppliers). The innovation must be visible and differentiable in order to be able to speak about it and to be easily remembered for it.
Feasible (F)	That means compatible in terms of costs, technologies and resources availability, in terms of gap to be covered, partnership solutions.

Example of Case (M4)  
(1h30 to 2hrs): Sorting and Conversion of ideas to projects

E manager used the method of the step 4 to sort out his ideas according to 3 parameters: degree of innovation, partnership orientation, and market attractiveness. He could then select one or two major ones and set priorities.

Module 4: Ideas Evaluation and selection of the Project(s)

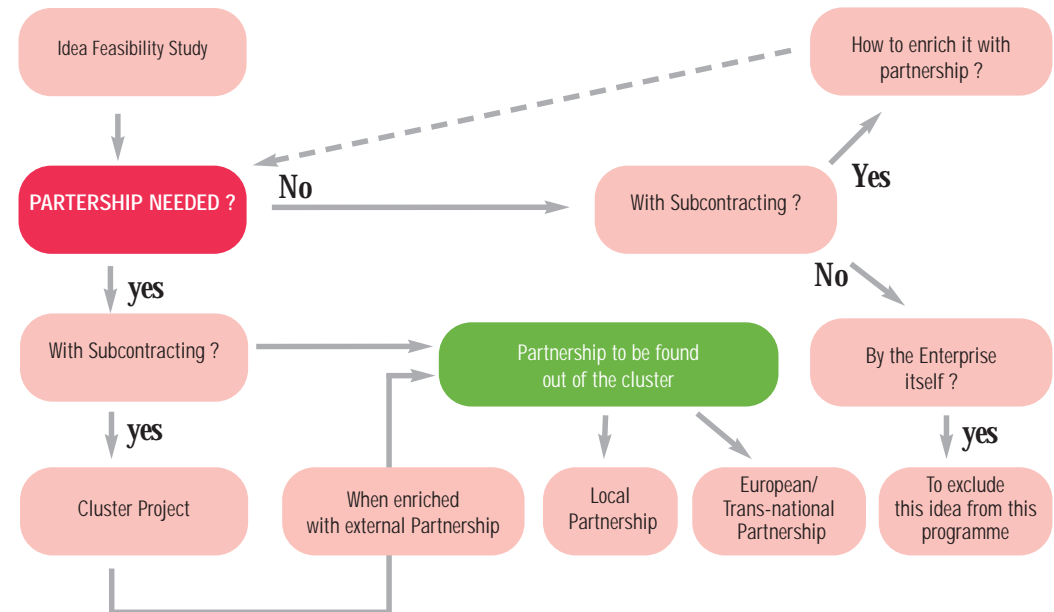
<b>ENTERPRISE NAME : Enterprise E</b> Date : 20/03/2008
<b>10 IDEAS SCREENING via E/I/F Method and Partnership Orientation</b>
<b>Market / Products Pair chosen (reminder) : M3 / P2&amp;P3</b>

N°	Ideas Title	Set a mark from 1 to 10				Partnership Orientation C: Cluster, R: Regional, N: National, E: European only, T: Trans-national (Europe and out of Europe)	The Attraction Level // the market(s), the ease of implementation (Strong, Medium, Weak)
		Experience (E)	Identifiable (I)	Feasible (F)	TOTAL		
1	A (issued from new technology)	6	9	6	21	E,N	S
2	B (Sustaining Improvement)	7	8	7	22	E,N	M
3	C (issued from New types used out France)	6	6	7	19	E,N,T	W
4	D (Customization ability development)	8	7	7	22	C,R,N	S
5	...E	6	8	6	20	E,N	S
6	...F	6	8	8	22	C,R	
7	...G	8	8	6	22	N,E,T	M
8	...H	8	9	4	21	N,E,T	W
9	...I	5	5	8	18	R,N,E	W
10	...J	7	6	6	19	C,R,N,E	S

Ideas Groups: (when needed, by setting colours on the matrice for instance)	
Blue	Development
Pink	Partnership contracts
Green	Business Strategy
Yellow	Organisation

Selected project(s) Definition (3 maximum)	Priorities
A (issued from new technology)	1
D (Customization ability development)	2

Partnership orientation



Example M4 (continued):  
Selected Project(s) and definition of the first main elements

<b>ENTERPRISE NAME : Enterprise E</b> Date : 20/03/2008							
<b>Selected project(s) Definition (3 maximum)</b> (Figures, Data, sources: from enterprise mentioned above)							

**Market / Products Pair chosen (reminder) : M3 / P2&P3**

N°	Project Title	Innovation Description / Schema	What problematic solved?	ASSETS internal to theEnterprise	Work packages Definition	Results to be achieved	Partnership Needs
1	A (Issued from new technology)	Features describing the innovation (size, design, sensitivity, cost...)	To increase use areas, to get a better differentiation	Skills and knowledge in the concerned domain - fame - Good knowledge of the field and problematic	Studies with research centres	Studies with research centres	N,E
					Patent	Idea protected (according to the partnership agreement with the Research centre)	N,E
					Analysis for the most appropriate mean of production	Quality and production optimized	C,N,E
2	D (Customization ability development)	Features describing the new means/way of customizing	To answer the right needs, to enlarge the market, while reducing time and cost to produce	Network, customer installed base - Good knowledge of Customer and fitters and logistic needs	Building blocks definition	Building blocks ready to use	C,R,N,E
					Definition of possible Assembly packages range	Offer of possible ranges defined - Time and costs saving	C,R,
					Tests of assembly packages range (interoperability and installation)	Reliability of the integrated assembly	C,R,N,E

**Selected Projects (reminder)**

Selected project(s) Definition (3 maximum)	Priorities
A (issued from new technology)	1
D (Customization ability development)	2

Module 5  
Technology Transfer Innovation Plan

**Objective:**

To help in defining the main fields with critical needs for the project, the associated actions, and to rank them.  
Then, to learn how to define criteria for selecting partners according different partnership types and to manage the partnership life cycle.

**Means:**

With the support of a worksheet, this functions like a checklist, to establish the list of actions to be implemented in order to fulfill the project and to establish their priority.

**Output for the companies:**

To know what type of partnership you need to stay on the leading edge regarding innovation and competitiveness.

**Good practices:**

It is strongly recommended that the project pilot and other leaders on the project actions participate to this session.

**Variants:**

An enterprise with projects already well defined could start directly with Module 5. It will try to define at once the right partnerships and partners. Nonetheless, it may need to come back and to perform the Newtackett cycle reversely up to module 3. This will allow it to test and to confirm or correct its vision for a best competitiveness positioning.

Example Case (M5)(3hrs): **Definition of Newtackett Partnership Actions Plan (NPAP)**

In this last step, E manager defined in details his project (mission, goals, limitations, risks reduction). He listed the main domains with actions field for each critical need, mainly in terms of partnerships and set priorities on the associated actions.

He defined also criteria for each type of partnership needed, which will facilitate the task to compare the potential partners and make a decision. Finally, a resume table will help him to follow up with his partnership contracts during all their life cycle. The consultant could give him at once some relevant contact about Research Centres.

On the next pages, you will find a full example of NPAP, concluding the Newtackett cycle of our typical Enterprise E case.

NEWTICKETT PARTNERSHIP ACTIONS PLAN (NPAP) Enterprise E (28/03/08)

1. Innovation Project Definition

The synthesis of the analysis made in the previous modules allowed the enterprise and the consultant to summarize the project / Work packages:

- Precisely define the Innovation Project / Work package(s)

<b>Project: A (issued from new technology)</b> Project Pilot: Manager E	
<b>What is the project or solution?</b>	
Mission, (reason of the project)	To get a better differentiation – to enlarge possibility of market according to the region. Better contribution to the environment and energy saving.
Objectives <i>(expected results which must be clear, measurable, accessible, realistic, temporal)</i>	Gain 20% in system outputs capability Gain 25% over one year in system usage Project starting date: April 2008
<b>Work packages</b> <i>(if defined at this stage in case of project)</i>	<b>Deliverables</b>
Studies with research centres	New Technology selected
Patent	Patent
Analysis for the best mean of production	Specifications for Manufacturing, and internal or external choice defined
<b>What is not part of the project?</b> <i>(to be specified to be sure to address the right need)</i>	
<ul style="list-style-type: none"> <li>Other sciences not linked to that domain</li> <li>Technology too much distant to be ready at least in medium term</li> <li>...</li> </ul>	
<b>What is known against this project?</b> <i>(knowledge, database, experience...)</i>	
<ul style="list-style-type: none"> <li>Conditions of use which are not very favourable</li> <li>The current systems and their limitations</li> <li>...</li> </ul>	
<b>What is unknown against this project?</b> <i>(General to details...)</i>	
1- the possible innovation in terms of new technology for these systems 2- the full list of research centres who could work on that domain 3- the price target depending on the expected savings	

**Try to reduce the unknown parts :** (by doing this, they aimed to reduce risks too, a solution can be foreseen according to the risk hypothesis (low, medium, high) when no or not sufficient knowledge can be got)

To reduce the unknown topics			
Unknown items	1- How to get some knowledge about this item	2- To make hypothesis	3- To sort out of the project frame
1- the possible innovation in terms of new technology for these systems	Questions... Know-how acquisition... Use what exists... To use scientists network, To subscribe to technologies offers and demands such as Mail opportunities (technology watch).		
2- The full list of research centres who could work on that domain	To contact poles of competitiveness and get research contacts working in this domain		
3- the price target depending on the expected savings	To make a market and costs reduction (saving) analysis. (Students or University could be used for doing that)		

2. Definition of Fields, Critical Needs, Actions and Priorities

Then the manager completed the next table by following these 4 steps:

- Step 1: He defined the areas of management / fields implied by the project or the work package.  
The following proposed areas have been explored as starting,  
- Technology (type, domain ...)  
- Expertise (basic, linked...)  
- Marketing (type, specific, common, products or services...)  
- Manufacturing (products, supply chain...)  
- Intellectual Property (IP) (known, search)  
- ... but other ones can be added
- Step 2: He describes what are the critical needs and profile required for each fields.
- Step 3: Then he found how to answer each needs with a possible measure or key initiative, which means an action to be set up.
- Step 4: Once all the actions have been set up, a priority will be given for each of them.

PARTNERSHIP PROJECT (or Workpackage): A (issued from new technology)			
Project Pilot Name: ME			
1	2	3	4
DEFINITION OF ACTION FIELDS (Areas of Management)	CRITICAL NEEDS AND PROFIL DESCRIPTION	POSSIBLE MEASURE / KEY INI- TIATIVE = ACTION	Action Number (prioritization)
<b>Technology</b>			
T1	To screen technological innovations that could boost the system	To find a contact of laboratory or research centre in each potential domain	2
T2			
T3			
<b>Expertise</b>			
About the new Technology selected	Partnership for creation of a new system	To make partnership with this (these) laboratory (ies), RC(s)	3a
<b>Marketing</b>			
	Market for using this new system	To make a market analysis	1
<b>Manufacturing</b>			
	To define the best mean of production (internally or outside)	To train concerned resources to this new technological domain	4
		Internal tests	5
		To find partners if too costly	6
<b>Intellectual Property (IP)</b>			
	To protect the idea	To make at least confidentiality convention and/or patent registration when needed according to the agreement/investment foreseen	3b
<b>Other</b>			
	...	...	

All the Actions are then reported on the next table for the follow-up and an Action Leader will be assigned for each of them

ACTIONS FOLLOW UP				
Partnership Project (or Workpackage): A (issued from new technology)				
Project Pilot Name : ME				
ACTIONS	Action Leader	On-Going	Achieved	Comments / Next step
1- To make a market analysis	ME	April 08		
2- To find laboratory/ research centre	ME	May 08		
3a- To make partnership with this (these) laboratory (ies), RC(s)	ME	June 08		
3b- To make convention – patent registration as needed	ME	June 08		
4- To train concerned resources to this new technological domain	ME	Oct 08		
5- Internal tests	ME	Dec 08		
6- To find partners if too costly	ME	Jan 09		
7- ...				

Finally, on the two next tables, the criteria have been defined and listed for each type of Partnership in order to make the potential partners selection.

### PARTNERS EVALUATION (Research Centres, Laboratories)

For Project (or Workpackage): A (issued from new technology)

Criteria	PARTNER 1 (name)	PARTNER 2 (name)	Comments
Skills in our domain in addition of their specialisa- tion( Complementary)			
Patents number already performed and ability to manage patents agreement			
Flexibility, reactivity			
Assessment / Analysis			
Best Practices use			
Technology based upon Research			
Demonstration Activities - Prototypes			
Project Pilot Assigned			
Costs			
...			

### PARTNERS EVALUATION (Manufacturing)

For Project (or Workpackage): A (issued from new technology)

Criteria	PARTNER 1 (name)	PARTNER 2 (name)	Comments
Group Importance/ Fame			
Skills			
Complementary Points			
Flexibility, reactivity			
Assessment / Analysis			
Best Practices use / Quality			
Technology based upon Research			
Building / Manufacturing capacity			
Deployment capacity			
Demonstration Activities			
Project Pilot Assigned			
Price			
...			

Once a partner is selected, and a contract signed, the manager will do a summary for each Partnership and will keep it updated and so can easily manage it during its life cycle:

#### File for any Partnership Contract

Partnership name/address/tel./site web :

Name :

Address :

Tel. :

Site Web :

#### Contact name / position / tel./ email :

Name :

Position :

Tel. :

Email :

#### The source of Partnership

(description of the origin)

#### Main Objectives and Goals of this Partnership

#### Partnership Implementation

#### Partnership Results

#### Partnership life (what is in common (means, facilities...), and what is not...):

## Conclusion

The Newtikkert methodology is a very powerful tool. Unlike the idea many people have on the relationships between efficacy and complexity, value or cost, this tool is quite simple to use, rather basic in its concept and free to use (but submitted to the acceptance of a chart giving access to the license). The greatest added-value of the Newtikkert method is the human contact it fosters, and YOU, as consultant conducting the methodology, are in frontline of this contact. You will be the person in charge of conducting the auto-evaluation on the partnership strategy of the client; you will be the person creating the atmosphere for the client entrepreneur to ask himself the right and pertinent questions, you will be the contact person when it comes to concretise the projects by finding the right partner. The Newtikkert toolbox, along with the relationship you will build with the **Cluster representatives** and the **Enterprise Europe Network** (and any other network or entity you might find useful to the case), brings you all you need in order for the client entrepreneur to evaluate his partnership strategy and the projects he has in the pipeline and to identify new projects he should realise to boost its competitiveness. Of course, it is the client entrepreneur who will take the decisive steps, he will answer the questions, evaluate the importance of his assets, identify the actions to be taken and define the strategy of his own enterprise. Still, your personal contribution is mandatory, you will ask the questions, reorient the answers for the discussion to stay in-topic and bring them in the focal point for the next step to begin.

Newtikkert is a strong basis to know how and why to build partnerships that can boost competitiveness and innovation, but the methodology should not be used exclusively without dedicating efforts in the satellite activities. Positioning the company inside the cluster, having it meet other companies of interest via **events, cluster meetings or company visits (\*)**, and any other activity in line with the projects and the strategy of the client company (like making a market study, listing state-of-the-art available technologies or providing information on international legislations) will bring a substantial plus to the conduction of the five modules. Here the relationship you will build with the managers or animators of the cluster and with the local representative of Enterprise Europe Network will be of greater importance, remember to keep them involved all along the process as they will bring some keys you will need in a later stage.

Conducting the Newtikkert methodology takes a substantial amount of time and efforts, but always keep in mind that this is a flexible tool, feel free to adapt it to your client's need and context and do not hesitate to spend more time on one module than on another. The separation of the methodology into five modules should also help you to impose a rhythm of implementation and to insist on the most important aspects for the client.

(\*) For example, the E manager of our typical case has participated in an inter-cluster exchange in Belgium in the Eco-building sector. He could develop relationships and realize on concrete things in the field.

The E manager can now develop partnerships and he is very satisfied. He gained time and confidence in partnering. Today, he continues to keep his consultant informed