

# Project Deliverable

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<b>Instrument:</b>  COORDINATION AND SUPPORT ACTION	<b>Thematic Priority</b>  HEALTH
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<b>Title</b>  <b><i>D3.4 Report on H2M Helpdesk Operation</i></b>
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<b>PP</b>	Restricted to other programme participants (including the Commission)	
<b>RE</b>	Restricted to a group defined by the consortium (including the Commission)	
<b>CO</b>	Confidential, only for members of the consortium (including the Commission)	

**Abstract :**

This document describes helpdesk function in Health-2-Market project, including the concept and deployment. The document covers the questions asked through helpdesk function as well as feedback provided to the participants. The document ends with conclusions related to setting up the helpdesk function within the project.

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# 1. Introduction and objectives

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Health-2-Market (H2M) aimed at providing support to researchers in the field of Health/life sciences in order to boost their competences in the commercialisation of their research results. One of the main project activities consisted in setting up and development of a H2M electronic infrastructure (e-infrastructure). The objective of the H2M e-infrastructure was to address the needs of a much wider audience of health researchers, overcome geographical limitations and facilitate the provision of e-learning courses and advanced services in particular to these target groups that are more prone to use them (e.g. young researchers).

The deployment of the Helpdesk function was an integral part of the H2M e-infrastructure and provided a supportive function. The objective of the Helpdesk Task was to deliver tailored helpdesk support related to intellectual assets management, entrepreneurship, business planning, new venture creation, fundraising and other issues related to valorisation of the research results. The target group for helpdesk's activities were the researchers prone to commercialisation of their research results. The service was provided free of charge and was available to everyone interested. The service was accessible online via the main H2M's web page ([www.health2market.eu/ask\\_the\\_expert](http://www.health2market.eu/ask_the_expert)). This service was provided continuously throughout the H2M project by UGOT as coordinator with support from other partners.

Initially, it was expected that the Helpdesk function would provide assistance and advice to approximately 200 researchers; however, this number was not met, due to the fact that many questions were asked during the seminars, academies, on-line e-learning, webinar , or just by contacting the relevant partner.

This deliverable explains the structure of the helpdesk function, its deployment and results as well as the corrective measures that were taken to try to attain the targeted number of questions asked. Within the results' section, the questions and answers collected are presented.

## 2. Structure of the helpdesk

### 2.1. General structure

The general structure of the Helpdesk function was divided into three different activities (Figure 1):

- The contact form allowing visitors to ask their question to an expert ;
- The Frequently Asked Questions (FAQ) section, which provided typical questions along with their answers ;
- An open forum to discuss topics of interest.

The contact form and the FAQ were accessible without registration; however, only registered users could participate in the forum.

WP 3.5

# Helpdesk Structure

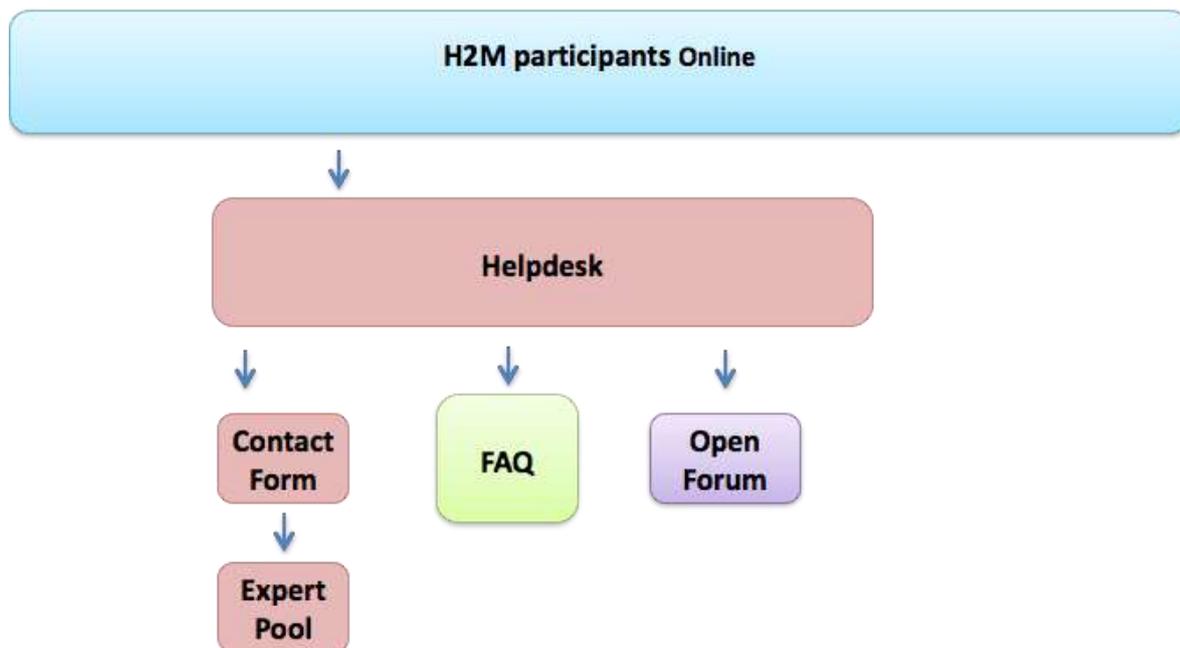


Figure 1 Overall Helpdesk structure

### 2.2. Contact form on the H2M's webpage

First contact was done through the contact form available on the H2M web-page. The service was open to anyone who visited the webpage. A site visitor could choose the Helpdesk item (later renamed to “Ask the Expert”) from the main menu on the home page and he/she was redirected to the Helpdesk page with a feedback form. The visitor was given a choice of topics for his/her question: business management, Intellectual property, marketing, business planning, new venture creation, entrepreneurship, ethics, and fundraising. After the topic was chosen, the visitor filled in the text with his/her question and was then required to leave a valid contact information.

After the question was submitted it was automatically transferred to a specific email address, set for helpdesk function. UGOT reviewed the questions and forwarded them to a corresponding relevant expert

within the project's team.

The expert then provided an answer through email to the visitor who made the inquiry. Helpdesk coordinator (UGOT) received a copy of the answer.

The experts' panel, comprising partners' representatives was approved to cover main possible areas of interest for the target group. The distribution of expertise among partners is described in Table 1.

**Table 1: Partners' expertise for helpdesk function**

Module	Partners					
	IE	UGOT	Q-plan	WR	EM	Inno TSD
<i>Intellectual Property</i>		X				
<i>Marketing</i>	X		X			
<i>Business Planning</i>			X	X		X
<i>New Venture Creation</i>	X			X		
<i>Entrepreneurship</i>						X
<i>Ethics</i>		X				
<i>Fundraising</i>			X		X	
<i>Business Management</i>	X		X			
<i>Certification and legislation For Medical devices</i>			X			

As a part of the project activities, the competences above were additionally matched with persons having corresponding expertise. During the project some of the partners were able to provide answers for questions outside of their competences, when good knowledge of local conditions was required.

### 2.3. Frequently Asked Questions section on Helpdesk page.

Initially, the plan was to collect users' questions through the previously described online questionnaire to address issues requested by the audience. However, due to the low number of questions asked online, it was decided to collect the FAQ from the project partners given their expertise and taking into consideration the questions coming from participants during seminars and academies. A list of 14 questions was compiled and published on H2M's webpage under "Helpdesk" webpage. The issues cover marketing, new venture creation, business planning, strategy, compliance and certification, intellectual property. The detailed questions are presented below (Section "Results").

### 2.4. "Open forum"

An open forum with thematically oriented discussion groups and moderated by selected experts from the consortium was organised for registered users of the e-infrastructure. During the period starting from October 2013 and February 2014 several introductory topics were uploaded on the webpage, where the moderators, representing the project partners, encouraged the participants to enter into discussions. However, this form of support was not developed further due to the absence of active users caused by low data traffic to the page. Given the resources required for setting up the open forum and assigning moderators to each topic it was decided to put the function on hold.

### 3. Helpdesk deployment and timeline

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The development of the helpdesk was carried out on the basis of the approved DOW document. The concept was developed after multiple discussions with most project partners involved in the task, especially with those in charge of marketing and web page development, trainings and consulting expertise. Planning and approval of the concept for helpdesk was completed in May 2013. Along with the concept document (See Annex 1), the main stakeholders were defined and the relevant experts were confirmed.

In August 2013 Helpdesk function was first launched on H2M's web page. Since then the page experienced quite low numbers of enquires from visitors. The questions submitted during that period were technical, related to problems with log in details or registration to the webpage. In the start phase Helpdesk function was only available for registered users. In order to increase the number of possible questions, the online questionnaire was made available to all visitors in May 2014. Additional efforts were made to make it clearer for the website users what helpdesk really was. The helpdesk function's name was changed on the website to "Ask the Expert». This resulted in slight increase of the incoming enquires related to the relevant topics. Apart from this, promotional materials on Helpdesk function were included in H2M newsletters as well as presented during all training activities carried out during the entire project. Helpdesk was also promoted through direct emails to the participants of H2M trainings. It is estimated that the message about Helpdesk function reached at least 1000 subscribers of H2M's webpage, as well as 100 trainings participants directly via H2M newsletter, direct e-mail or in person. Apart from participants of H2M's training, helpdesk function was promoted through personal networks of the partners' staff during the entire project.

During 2014 the materials for FAQ section were collected and published on the webpage in 2015 available to all online users.

## 4. Results

### 4.1. Questions to helpdesk

Below is the examples of the enquires addressed to helpdesk. Some of the questions were submitted online, some questions were asked during Health-2-Market trainings. Messages of technical character, as well as confusing or unclear messages are not included below.

**Table 2 Incoming questions to Helpdesk submitted via online questionnaire**

Question	Answer	Responsible	Channel
To whom it may concern, I am a researcher in Uppsala University in Sweden. With a colleague of mine we decided to start a company in Sweden and provide consulting services. There are many documents and formalities need to be in place for starting a company, in fact. Are there any organisations that can help to establish a company and do the paperwork for free (or for a descent payment)? Best regards Alexander Salamiatsits Uppsala, Sweden	Dear Alexander, Please be advised that you can find all the relevant information at <a href="http://bolagsverket.se">bolagsverket.se</a> and <a href="http://skatteverket.se">skatteverket.se</a> . You may look at the following organisations for free advise: ALMI Nyföretagrcentrum Drivhuset	UGOT	Online
We developed an innovative approach and will use it in our company. We do not plan to patent it, as we 'll only use it internally. However, if another company developed the same approach and patent it, we do not want to be in a situation to loose our right to use our approach. How do you suggest to proceed? We understand that we should publish our approach in any way, not necessarily in the journal – for example, in the publicly accessible document on the internet web site – and then we can prove that we developed it earlier and we'll not be prevented from use. Please confirm that this is correct. Also, are there any other ways to proceed in our situation?	When establishing a strong control position in relation to you innovation you need to define what needs to be protected and then select a correct form of protection. Patents protect inventions as solutions to specific technical problems, copyright protects creative works, trademarks protect business identities, and design rights protect appearance of the product. An innovation may often contain more elements than, merely a patentable invention, and include, for example, databases, software algorithms, written instructions, established reputation, etc. The best control is reached when different types of IP protection are combined. In your situation, any publication may destroy novelty for potential patent. So we can recommend you to either file for provisional patent application (and you will have 12 month to follow up with the actual patent application) to ensure your novelty, or keep the invention secret until you find the possibility to file for patent. Other than that, please try to identify the possible assets that you have, all of them could be protected somehow through different types of IPR. For more information look at some case studies at H2M website.	UGOT	Trainings
We have started a company a year ago with a friend of mine in Czech Republic. We've got some funding for development of a therapeutic device. It's only two of us working part time. My friend has gotten a job offer from a company in Wien and she wants to take it. this means that I have to find someone new for working on the project, but it will require much time and effort for me. Can you suggest any solution for the problem? Thank you	thanks for your email. It seems that your endeavor is indeed at a critical stage. Our first piece of advice is to NOT try to complete this on your own. Many projects fail just because not much / enough work is put into them. A single person working half-time does not sound enough to make this project viable. Then the options you have are the following. First, your friend may still be able to work part time on this from Vienna. This is definitely possible (skype, etc.), and mostly depends on her willingness to do it. If she wants to do it, then in fact this can be beneficial to the project, as she may gain access to new networks, knowledge, etc. Second, if continuing working on this is not possible for her, you need to create a profile of the person that you want to recruit. If you want someone to just replace your friend, then her profile should be your benchmark. You could then advertise your offer to organizations in which this profile can be found (e.g., technology transfer	QPlan	Online

	<p>offices, health researchers associations, etc.). It is important to do this in a time efficient way - post it in their forums, ask a moderator to email it to interested parties, etc. At the same time, you could even investigate your personal network (friends, colleagues, etc) for a reliable solution.</p> <p>Finally, you may want to choose to recruit someone who will be subordinate to you. In this case, a good idea could be to contact career's offices of local health schools and universities. In this case, you will get someone with less experience, but potentially with more eagerness to work. Your role in terms of decision making and running the project will be a lot more crucial though and at the same time the operational costs will become higher.</p> <p>Of course all the alternatives mentioned above also depend on your degree of commitment to the endeavor and your ability and willingness to invest time, work and money on it.</p> <p>Hope this answer is helpful to you The Health-2-Market team</p>		
<p>Good Evening. I'm a beautician specializing in bio-disciplines naturali. Following an observational study sull'ipertricosi, I discovered that the cause of reflection invests some problems of a gynecological. Seeking a research institution, employees to disseminate and promote the results. I study? It was supported by a gynecologist. (originally submitted in Italian translated using Google Translate)</p>	<p>Dear,</p> <p>I enclose the work program Health, where you need to identify one or more topics which are of interest to you. You must also consider only those of 2015; PHC-2015) as those of 2014 have already expired. On page 55 is the different deadlines for each topic.</p> <p>Remember that the H2020 projects are collaborative research, where the minimum requirement is the creation of a partnership of a minimum of three entities established in three different Member States or associated countries. This also means that the impact / outputs of the project can not remain at the local / regional / national but at European level.</p> <p>At this link you can find all documentaizone neccesaria of Horizon 2020 <a href="http://ec.europa.eu/research/participants/portal/desktop/en/funding/reference_docs.html">http://ec.europa.eu/research/participants/portal/desktop/en/funding/reference_docs.html</a></p> <p>Another program run by the DG SANCO (Health and consumer protection) is on Public Health: <a href="http://ec.europa.eu/chafea/health/index.html">http://ec.europa.eu/chafea/health/index.html</a></p> <p>There is another program that covers in particular neurodegenerative diseases. Strategy Research of the Joint Programme on Neurodegenerative Diseases (JPND)</p> <p>The strategy is a vision of JPND to coordinate research in the field of neurodegenerative diseases, particularly Alzheimer's. It addresses the full spectrum of research that is needed to address the growing burden of these diseases over the next decade and beyond.</p> <p>The objective of the Joint Programme (JPND) is to rapidly improve our understanding of the causes of these diseases. In addition to providing the tools doctors to diagnose and treat these diseases since the early stage, the JPND should also lead to a better system of health and social care for both patients and those who take care of them.</p> <p>More information: <a href="http://www.neurodegenerationresearch.eu/">http://www.neurodegenerationresearch.eu/</a></p> <p>I take this opportunity to inform you of the portal Fit for Health (<a href="http://www.fitforhealth.eu/participate.aspx">http://www.fitforhealth.eu/participate.aspx</a>), a network of experts for the participation of research centers, universities and small and medium-sized innovative companies, in European projects Research on health.</p> <p>By registering you will be able not only to publish its research profile, making it visible to everyone, but also look for partners to eventually be able to carry a project idea.</p> <p>The council also portal HEALTH COMPETENCE (<a href="http://www.healthcompetence.eu/converis/publicw">http://www.healthcompetence.eu/converis/publicw</a></p>	APRE	Online

	<p>eb/area/1353) supported by FP7, which works as a database of projects funded since 2004 in the health and life sciences.</p> <p>Gives visibility to organizations and researchers involved in these projects and, together with the devices of interactive research, facilitates the identification of potential partners and the establishment of partnerships between academia and industry in health research. At this link: <a href="http://www.healthcompetence.eu/">http://www.healthcompetence.eu/</a> can do a research project with the ability to filter based on the keywords, research areas, countries, etc. (Originally sent in Italian translated using Google Translate)</p>		
<p>Dear Madam/ Sir I am spinal surgeon working in Oxford University. I have an idea that will help make Spinal Surgery Safer by using existing technology with the addition of a new device. I would like to know if I can patent the idea of using existing technology of different companies. This technology in form of machines is already used but the addition of my device will offer better care for the patients in a safer way and reduce operating time. In a simple way "Can I patent an idea?" Please let me know if you need any further details. Regards Dr Pavlos Panteliadis</p>	<p>From the general information you have provided it is not a clear yes or no answer. It depends on if existing technologies and your device together can be considered to be a technical invention which is new and differ from what is already known. The advice is to get professional help from patent attorney in UK. You need to provide them with more information.</p>	UGOT	Online
<p>Hello, We are 2 psychologists doing research in prevention and health promotion, in our SME. It is an inexpensive research. It has very good results. The impact of results is important, great. We are looking for funding. Research currently stands. We have no money to continue. We do not know how to present our work to the world. We live in Madrid. In Spain it is very difficult to get money for research if you are not working by University or if you don't have contacts. thank you very much Josefina Gonz?lez Calvo M? Cecilia Machicado Villamizar</p>	<p>Dear Josefina, Thank you very much for the abstract. After taking a look, I cannot get the potential innovation of the idea. Which should be the core of the project? I understand that it's more psychology-oriented than research and innovation as the European Commission means. I send you the calls that are open in 2015, you can see that 3 of them close on 24th February, so you should consider 21st April that are very ICT-related; development of technologies, instruments, etc. At this point I suggest you to read the different calls of April and check in which of them your expertise could fit. Please use also Fit for Health for searching project ideas or profiles using keywords. By now, I think you should address another kind of EU programme which is more oriented to Public Health: 3rd Health Programme <a href="http://ec.europa.eu/chafea/health/">http://ec.europa.eu/chafea/health/</a> The call (grants for projects) will open around April/May, this is the last call closed on September 2014: <a href="http://ec.europa.eu/chafea/health/projects.html">http://ec.europa.eu/chafea/health/projects.html</a> For Horizon2020 you should wait to the next Health Work Programme 2016-2017 that will be published at the end of September 2015. PS: you can find all the information regarding Horizon 2020 -Research and Innovation Framework Programme here: <a href="http://ec.europa.eu/research/participants/portal/desktop/en/home.html">http://ec.europa.eu/research/participants/portal/desktop/en/home.html</a></p>	APRE	Online
<p>Dear I am a PHD student in the university and i'm doing research on lymphatic cell alignment. I have talked with a person from a big pharma company and she said that the research looks interesting and worth investing. But they might want me to start work for them and I was thinking about staying in the university. are there any other possibilities for getting funding for continuing research without the need to publish in a way that is often required by</p>	<p>At first, we have to point out that each funding initiative (national, European, private or public) has certain rules one has to comply with. So, if the specific funding initiative has certain requirements regarding publications, then they have to be followed. There are several funding initiatives providing grants to researchers. The necessary steps you have to follow in order to get funded are drafted below:</p> <ol style="list-style-type: none"> <li>a) Shape your idea / research scope as specifically as possible.</li> <li>b) Define the resources needed for</li> </ol>	QPlan	Online

different grants? Best regards Ferec	<p>carrying out the research.</p> <p>c) Start looking into the specifications of the research funding initiatives.</p> <p>d) (if you find something suitable) Adjust the initial idea / research scope, so that it fits the specifications of the research funding initiative.</p> <p>e) Prepare a respective application according to the specifications of the research funding initiative.</p> <p>f) (if you are selected) Carry out the research project.</p> <p>In general, it is the institution (university) that can participate in a research project and get funded. So you first have to consult with your supervising Professor and with the responsible organizational units within your university (that will provide specific guidance to you).</p> <p>Health-2-Market has prepared a webinar entitled “<b>Access to Risk Finance in the 2014-2020 EU Funding Programmes</b>” (you may find it here: <a href="http://www.health2market.eu/webinar/1">http://www.health2market.eu/webinar/1</a>), that provides several relevant information.</p>		
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## 4.2. Frequently asked questions

This section of Helpdesk function was intended to provide website visitors with answers to the most usual questions in relation to commercialisation. In 2014 H2M partner organisations were asked to collect frequently asked questions from the project target group in their respective areas of expertise. The questions coming from participants during seminars and academies were also taken in consideration. The list of 14 questions was compiled and published on the webpage.

**Table 3 List of FAQs published on Helpdesk page**

Engage	
<p><b>Q1</b> How can you find out about end-user needs?</p>	<p><b>A1</b> There are several ways that fall into three main categories: talk to them, talk to people who know them, or read about them. In talking to people you can use informal discussions and more formal interviews, focus groups, and surveys. In reading about them you can use roadmaps, articles in trade journals, blogs, and the like.</p>
<p><b>Q2</b> When is cold calling advisable and what are the two things that make cold calling much easier?</p>	<p><b>A2</b> Cold calling is always advisable when you do not know people in relevant targets (e.g. companies, organizations, etc.), or do not have connections to someone via networking. Without speaking to these persons, you cannot assess if they will be interested in for example acquiring the technology or in financing your company and what information they would like to have to make a decision. The two things that make cold calling easier are: Starting higher up in the organization with someone whose job definition likely includes managing people who scan the horizon for new technologies and having a specific name to ask for when you reach the target's receptionist.</p>
<p><b>TSD</b> <b>Q3</b> I am currently a researcher in a public institution. What will become my status once I commercialize my research results?</p>	<p><b>A3</b> There are different ways of commercialization and your status will depend upon which you chose. The status may also differ from one country to another. A local incubator should be able to advise you.</p> <p><b>a)</b> If you protect your research results through a <b>patent</b> whilst staying at your current post (e.g. in a university or public research center), no change should occur. Check however for the Intellectual Property Rights for such commercialization activity. Health-2-Market offers specific trainings and advanced services on IPR related topics.</p> <p><b>b)</b> If you <b>create a company</b>, you'd become an <b>entrepreneur</b> – you will have to register your company at the respective office (the Chamber of Commerce can advise you where and how to do so), your status will depend on your country. Indeed, the status of a public researcher differing from country to country, in some you might be able to be placed on reserve in the public service for some time (e.g. in France). This would mean you keep your status of “public servant/official”, but can benefit of some free time to create your company. Make sure you check the conditions in your country. Health-2-Market offers specific trainings on entrepreneurship related topics.</p> <p><b>c)</b> If you wish to <b>commercialize your research results through business creation without losing your position</b> and without having to take over the role of entrepreneur / managing director, you can consider two other solutions:</p>

	<ul style="list-style-type: none"> <li>Find a suitable business developer having the skills to create a company (business plan development, market analysis, etc.). You could remain associated to the project in the position of a <b>Scientific Director</b> for instance. Health-2-Market offers an advanced service on “teambuilding / matchmaking”.</li> <li>You might consider <b>licensing</b> of your research results/idea to a company instead of creating one yourself.</li> </ul>
<p><b>Q4</b> I have a great idea. What questions should I consider before creating a business and where can I get answers?</p>	<p><b>A4</b> The main questions you should consider are related to the following fields:</p> <p><b>a) Viability/ marketability of the idea:</b> is the idea really innovative (publications, existing property rights?), is there a market, who would pay and how much in order to buy your product, etc.</p> <p><b>b) Financial questions:</b> what capital and/or proper funds are needed, how to get access, what are the rules of co-financing when applying for public funds, etc.</p> <p><b>c) Intellectual Property Rights (IPR):</b> who owns the right after patenting, at what stage should you protect your results through a patent, etc.</p> <p><b>d) Administrative issues:</b> where to register your enterprise, what are the conditions, etc.</p> <p><b>e) Regulations / standardization:</b> which regulations apply for which product, etc. (in Europe, the EC rules apply, but they are different for “health” products vs. “cosmetics”, “nutrition”, etc.)</p> <p><b>f) Logistics:</b> where and how to get use of material that is needed for the development, e.g. a laboratory, instruments, etc.</p> <p>The different steps of getting advise can generally be listed as:</p> <ul style="list-style-type: none"> <li><b>Your internal office</b> (inside your university, research center, etc.): they have the skills and experience to assist you testing the marketability of your idea, answer IPR related questions, give information on finances, regulations, etc.</li> <li><b>An incubator:</b> once your idea can be considered viable, the valorization office would redirect you to an appropriate incubator. The incubator’s role is to accompany you in further steps (advise, eventually match-making with someone having complementary skills for a business creation, provision with or access to an office/laboratory space, etc.)</li> </ul>
<p><b>WR</b> <b>Q5</b> My research results are not quite ready for market deployment yet. Isn’t it a bit too early for me to start working on a business plan?</p>	<p><b>A5</b> The earlier the better! History is filled with examples of inventions and research results that never made it to the market due to faulty business plans that were prepared at the last minute. The sooner you start working on your business plan, the sooner you will start talking the commercialization language, evaluating the feasibility of the venture and reconsidering your assumptions as you will have to examine, in depth, various aspects of the business planning process such as market of operation, target customers, competition, problems which must be overcome in order for the plan to be fulfilled, etc. The early composition of an effective business plan will considerably raise the chances for successful market deployment of your research results serving as a roadmap for your future entrepreneurial endeavor. We advise you to browse through our website to see how Health-2-Market can help you prepare an effective business plan for the commercial exploitation of your research results.</p>
<p><b>Q6</b> I realize the importance of a business plan for the commercialization of my research results but I do not think I can do this alone. Is Health-2-Market able to help me with this task?</p>	<p><b>A6</b> YES! Acknowledging the vital role that an effective business plan plays in new commercial ventures, Health-2-Market can assist you by offering the “Business Plan Formulation” advanced service. With this service, experienced professionals from the Health-2-Market team will work with you in order to translate your ideas into a comprehensive business plan for successful commercial deployment or access to capital. In close collaboration with you we will make sure that the business plan thoroughly assesses and demonstrates in a rigorous manner the commercial viability of the proposed venture while making the necessary adaptations to suit the target group and purpose of the plan (e.g. banks, venture capital, own strategy, etc.). Information on how you can access this service is available in the Health-2-Market website.</p>
<p><b>Q7</b> How can market research contribute to the commercial exploitation of my research?</p>	<p><b>A7</b> Market research is the standard tool for the development of an effective evidence-based marketing strategy and ultimately for the successful market deployment of your research outcomes. It will provide the foundations for a sound marketing plan revealing valuable insights about the market environment of the proposed venture such as possible areas of application, prospective customer groups and needs, competitors, channels of distribution etc. A professional market research study can provide real marketing intelligence, a necessary block for a convincing marketing plan that can give the competitive edge for most commercial objectives.</p>
<p><b>Q8</b> What is marketing exactly and how can a marketing strategy help me commercialize my research results?</p>	<p><b>A8</b> Marketing is the art of delivering successful products and services to the market. Many people often erroneously confuse marketing with advertising. In reality, marketing is a broad organizational function that envelops almost everything a company does to reach its target audience including pricing, sales, distribution, promotional efforts and advertising among others. The adoption of an effective marketing</p>

	strategy will enable you to realize the full potential of the commercial exploitation of your research results by emphasizing on the in depth understanding of the market environment (with special focus on competitors and customers) in order to properly position your products and services in the market.
<b>Q-plan</b>	
<b>Q9</b> I have designed a medical device I plan to put in the European market. Does the company producing the device have to be ISO 9001 certified?	<b>A9</b> NO. ISO 9001 certification is voluntary. Of course, sometimes it is a business necessity since many customers (from the private and public sector) require possessing such a certificate. What is mandatory for the product to circulate within the European Union (EU), the European Economic Area (EEA) and Switzerland is to be CE marked. The basic legislation consists for medical devices' CE marking is (i) medical device Directive, 93/42/EEC, (ii) in vitro diagnostic medical devices Directive 98/79/EC and (iii) active implantable devices Directive 90/385/EEC.
<b>Q10</b> I know that the medical device I have designed has to be CE marked so that it can be sold in Europe. Can Health-2-Market help me with the procedures I have to follow?	<b>A10</b> YES. Health-2-Market has designed advanced services that suit your need, i.e. "Support for implementing EU legislation and Quality Management Systems for medical devices". Our services consist in analyzing the nature (basic characteristics and intended use) of the medical device under question, classifying it according to the directives' classification, determining the applicable directives / standards / requirements and providing a roadmap (i.e. procedure, costs, time schedules, main production requirements, certification process etc.) for the appropriate assessment / certification route.
<b>Q11</b> I want to commercially exploit my research results but the composition of a business plan seems like an arduous task that will steal precious time away from my research. Why should I waste my time writing a business plan?	<b>A11</b> The development of a business plan may, indeed, require a lot of work. However, preparing a business plan is hardly a waste of time. In fact, it will more likely help you with your exploitation efforts rather than hinder the progress of your research. While the principal objective is typically to construct a compelling case to secure financing (e.g. Venture Capital, grants, bank loans etc.) the plan can also serve as the blueprint of your commercial venture and will most probably follow you throughout your entrepreneurial course as it encompasses all aspects of the business planning process such as vision declaration, mission statement and strategy alongside with sub-plans to cover marketing, operations, human resources, financing as well as a plan for IPR and regulatory aspects. Therefore, in its final form it will essentially serve as a comprehensive operating manual towards the achievement of your objectives. In other words, the business plan is effectively the first sales brochure of your new product or service and investing your time to prepare one is as necessary as the need for patents and publications at a scientific journal.
<b>Q12</b> I have already prepared a business plan. However, I do not think it is good enough to secure the financing I need to commercialize my product. What can Health-2-Market do for me?	<b>A12</b> Health-2-Market has developed the "Business Plan Evaluation" service especially for you. The Health-2-Market team will scrutinize your business plan in order to provide effective advice and constructive recommendations to improve and further customize the plan to your specific business needs and target audience (e.g. banks, Venture Capital, grants etc.). We encourage you to check the Health-2-Market website to find out how you can gain access to this advanced service.
<b>UGOT</b>	
<b>Q13</b> How can patent information be used to map out collaboration partners and/or competitors in relation to your own innovation?	<b>A13</b> The legal documents that are required in Intellectual Property Rights contain information that can be useful in business analyses. An example is using patent document information in mapping out positions, where you can use the following data: <ul style="list-style-type: none"> <li>• Filing date</li> <li>• Patent classes (in what technical areas the invention is in)</li> <li>• Assignee (the owner of invention)</li> <li>• Inventor</li> <li>• Patent type (i.e. product, process or application patent)</li> <li>• Geographical coverage</li> <li>• Citations</li> </ul> <p>These factors can be mixed in many ways to reach a satisfying analysis but in the question above, the common way to do it is to start with searching for patents in the same classification of your own invention to get a bulk of patents to start with. From that bulk, you limit the search by adding keywords (important parts of the invention. For example the keyword "plastic" if you are having a plastic bag invention in the "packaging container" classification) until you have a satisfying new bulk of patents (by checking samples in the bulk). You could now say that the patents you have got in the new bulk are the ones in field of your invention.</p> <p>You could then, by using the data in the bullet points, map different analysis where some examples are:</p> <ul style="list-style-type: none"> <li>• Filed patent per year and assignee. This shows how active a company is in the field of your invention. Maybe it was very active in the 1990s but has completely changes research areas? Or has one company had a boost the last two years? This map is probably the most relevant one for this question.</li> <li>• Filed patents per countries and assignee. This shows what strategy potential partners/competitors have in what markets they aiming at. Are they leaving China for Russia in the last</li> </ul>

	<p>three years?</p> <ul style="list-style-type: none"> <li>• Inventor in relation to assignee and year. This shows if there are any key inventors in the field of your invention. Do one company have one person that is crucial? Have an inventor changed employer over time?</li> <li>•</li> </ul>
<p><b>Q14</b> How can IP and IPR be used as tools to control innovations?</p>	<p><b>A14</b></p> <p>When deciding how to create the strongest control over innovation one needs to consider the dual nature of IPRs. On one hand, Intellectual Property Rights convey exclusive rights of the owner to use one's intangible assets. On the other hand, in order to obtain effective protection you need to make certain parts of the innovation public (e.g. patent applications and designs are published). Another thing to consider is that the IPRs are limited in time of protection (with the exception for trademarks).</p> <p>When establishing a strong control position in relation to you innovation you need to define what needs to be protected and then select a correct form of protection. Patents protect inventions as solutions to specific technical problems, copyright protects creative works, trademarks protect business identities, and design rights protect appearance of the product. An innovation may often contain more elements than, merely a patentable invention, and include, for example, databases, software algorithms, written instructions, established reputation, etc. The best control is reached when different types of IP protection are combined. Think, for example, about the IP protection for generic drugs: the essential patents have expired long ago whereas, the pharmaceutical companies are still able to control their products through extensive trademark protection. As some building blocks of innovation protected by IPR become public it is necessary to complement their scope of protection with other intellectual assets that could be kept in-house, for example trade secrets.</p>

## 5. Lessons learned and conclusions

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During the concept development and planning period Helpdesk function was seen as a means to provide researchers with enhanced tailor-made expert support in utilisation of their commercial activities. The structure of the function and its availability online created positive prerequisites for increasing number of researcher that get the access to support resources regardless of where they are geographically. Involvement of all the project partners provided a broad range of questions that could be addressed through helpdesk function. Making helpdesk function with an online contact form for submitting questions available to all the website users was also important to increasing the number of questions asked and answered.

Regardless of the measures taken to promote the function, the helpdesk experienced quite low number of questions, given the expectations during the planning and concept development. There are several important lessons learnt for implementation of similar initiatives in future:

### 1. The target groups is not ready to ask the questions in the proposed format.

While interviewing the researchers during training activities and academies organised within the project, it was found out that, overall, the target group seemed to be interested in the possibility to ask questions, related to the subject areas presented at helpdesk. Moreover, the researchers admitted that they lack knowledge in commercialisation issues and would appreciate help and advice from the experts.

At the same time, questions were asked face-to-face during informal conversations with instructors and therefore there was no need for participants to use the helpdesk function online. Furthermore, the selected design of helpdesk implies that a user has a concrete question and is able to categorise it. The experience from trainings shows that the questions raised by the target group were often very broad, for example: "How do I know what patents are involved in the research I pursue?"; "Do I need a business plan?", "I need to publish a paper, but I don't know how to make sure that I keep control over my innovation?" Most of those frequently asked questions were addressed in FAQ section of the website. While the information is published on H2M's web page, it competes with other online resources and search engines in attracting Internet users to the site.

#### *Conclusion 1:*

The selected online design of the helpdesk function was not suitable for the target group. Issues related to valorisation in a research project are a highly sensitive topic for a researcher. Moreover, it is possible that while asking those questions online, the researchers may unintentionally reveal some valuable information about the project. Therefore people preferred to ask their questions to the trainers they have met in person, rather than use a web site.

### 2. Low user traffic to Helpdesk and marketing.

A standard conversion rate for online industries is about 2%<sup>1</sup>, meaning that of a hundred users coming to a specific website, only 2 will actually buy something, or leave feedback, or otherwise be active. This implies that one of the key actions to raise the number of questions to helpdesk function was to significantly increase direct traffic to the helpdesk webpage. For the whole period of the project, there were roughly 300 unique visitors to the Helpdesk web page (both as "Helpdesk" as well as "Ask the Expert"), which is quite low to be able to generate somewhat significant number of questions. It is however coherent with the number of questions asked: 6 questions corresponding to 2% of unique visitors.

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<sup>1</sup> Reference: Smart Insights, E-commerce conversion rates, available at <http://www.smartinsights.com/ecommerce/ecommerce-analytics/ecommerce-conversion-rates/> retrieved on July, 19, 2015.

From the resource standpoint, the whole H2M project was promoted as whole, as well as training activities were promoted separately depending on the specific target group. Information about Helpdesk was included in the promotion materials. As a result, the activities aimed at generating traffic directly to Helpdesk page were insufficient for reaching the desired number of questions.

*Conclusion 2:*

In order to be able to provide support via an online helpdesk function, special marketing efforts need to be done for its promotion. While a highly competent team of experts was established during Health-2-Market project, there was shortage of marketing efforts for helpdesk promotion. Promoting online helpdesk function as a by-part of a project is not sufficient for reaching out the target group.

Finally, there are **too many helpdesks** in operations (namely, IPR helpdesk, helpdesk facilities by the projects such as Fit For Health...). Thus, together with these facilities existing since long time, and with possibility to ask questions to H2M team via seminars, academies, on-line training, webinar or just by contacting one of the partners, there was simply very low demand for H2M Helpdesk.

## 6. Annex 1 Helpdesk Concept

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## 1. INTRODUCTION

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The helpdesk has a supportive function to the e-training platform to provide tailored helpdesk support related to intellectual asset management, entrepreneurship, business / exploitation planning and other related issues to interested researchers (end users) prone to the commercialisation of their research results. This service will be provided free of charge for the H2M training participants – beneficiaries of the FP7 projects - continuously by UGOT with support from EM, IE, Engage and SKEMA. Support will be provided in following forms:

- a) A contact team will be determined and announced. First contact will be done by email via the contact form, and then email, telephone contact as well as other e-means may be deployed.
- b) Frequently Asked Questions will be developed and posted on the web portal.
- c) An “Open forum” with thematically oriented discussion groups, moderated by selected experts from the consortium, open to all participants . Our experience shows that the helpdesk is a valuable source to identified beneficiaries for advanced support, planned in WP5 (see below).

The methodology in this task was based on the DOW document to compile a concept & development plan for comments from EM, IE and SKEMA. Further, based on the collected comments a questionnaire was created in and sent to all partners in 2013 Mars 20. This concept document was generated from the questionnaire responses.

This document will be further developed and the key points of this document will be reported on the progress or output of the helpdesk.

## 2. HELPDESK PLATFORM DESCRIPTION

### 2.1 General considerations

#### The helpdesk users

- Participants in the online training
- Participants in the offline training

A separate (non-helpdesk) service FAQ and general online form should be available on H2M open website.

The helpdesk users are required to login in order to get access to the helpdesk platform and modules. Login details and information should be provided once registration/participation is confirmed.

The demand for the helpdesk is quite uncertain related to the needed resources. This concept might be revised while in action, if the work load is changed.

### 2.2 Platform and modules

#### Modules in H2M Helpdesk

Module overview and logics figure

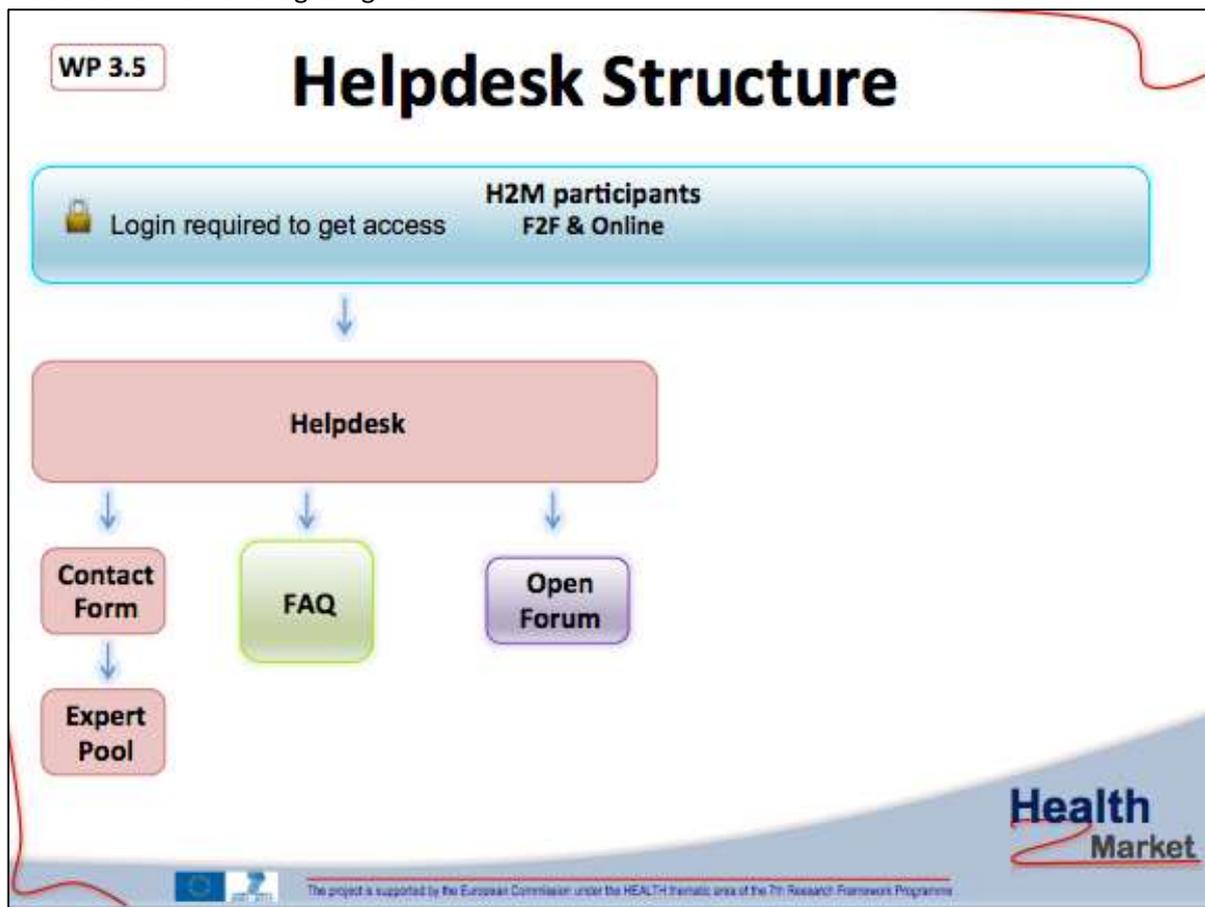


Figure 2 Helpdesk Structure

## Module Specification Summary

Module Name	Function
FAQ (Frequently Asked Questions) - Only for participators	<ul style="list-style-type: none"> <li>• Login req.</li> <li>• Source/database of frequently asked questions for participants</li> </ul>
Contact Form	<ul style="list-style-type: none"> <li>• Participants can ask more specific questions regarding their innovation project to experts within H2M partners, however each partner are responsible to respond according to their specific regulations and time availability.</li> </ul>
Open Forum	<ul style="list-style-type: none"> <li>• Login req.</li> <li>• A forum for participants to discuss various subjects and questions regarding this project.</li> <li>• Moderated by selected experts.</li> </ul>
H2M open webpage (not part of the Helpdesk function)	<ul style="list-style-type: none"> <li>• Open FAQ: <ul style="list-style-type: none"> <li>- Details about training planning and dates</li> <li>- Technical questions about the homepage and e-learning, login function etc.</li> </ul> </li> <li>• No login req.</li> </ul>

### FAQ

- Constituted of the most relevant and frequently asked questions related specific topics:
  - Intellectual asset management, Entrepreneurship and Business / exploitation planning etc.
  - Training/course in H2M projects.
- Only available to H2M training participants (online and offline training)
- The main relevant questions should be included. This structure can be extended based on the questions received in the meantime.
- All QA should generally not contain private or confidential data.
- Each partner are responsible to send in two proper FAQ to EM prior start of e-platform pilot in order to have some data until launch.
- One partner is responsible to keep the quality and chose the relevant FAQ to be presented from the database. Initially, this task is operated by UGOT regarding approval of questions and answers from all partners. EM has the responsibility to update the webpage with the new approved FAQs.
- The operator/operators should be responsible for the quality assessment of the uploaded FAQs. However, each partner should collect question and are responsible to only send relevant FAQ with high quality to the operating administrator for evaluation.
- The FAQ should be further updated and developed periodically, every 3 month with an opportunity for update continuously and directly, as a new relevant FAQ is generated/collected. Based on the relevance/importance of the question the key questions should be updated immediately, the other questions with periodical updates.
- The questionnaire should be structured according to selected topics, especially at the later stage, when some questions are cumulated.
- A clarifying text on the first page (FAQ) that some requests couldn't be treated (legal reasons, etc.). Some questions could be answered by partners, some requests would be redirected.
- Concept: Figure

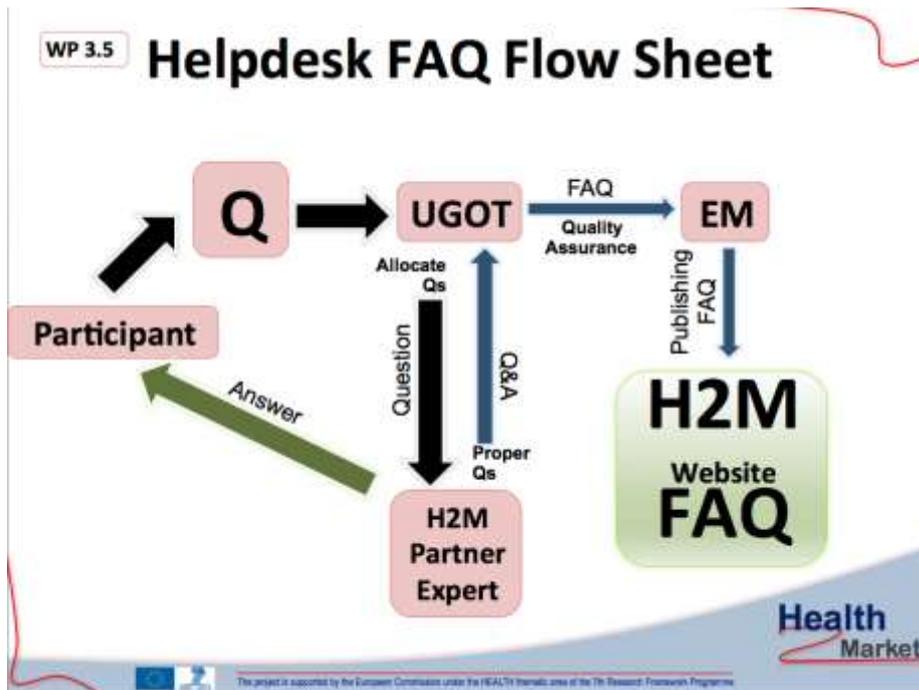


Figure 3 Helpdesk FAQ Flow Sheet

### Contact Form/Expert Pool

- Expert Pool based on the internal members / H2M partners. In addition further contact points externally such as TTOs etc. Each partner is responsible for his/her information; external information should not be considered to come "from H2M", but question not possible to treat should be redirect people to other contact points, but that this is not relevant to H2M work anymore.
- Get matched with the right expert manually by the helpdesk operator.
- Experts will be listed in order of their categorization of expertise/competence area, however this information is only for internal use and not publicly distributed.
- Many questions that will be raised from participants are most likely linked to the local context. This would require expert/s from the specific region in order to develop an appropriate answer.
- Preferably, there should be an ambition to respond / follow up when a question is asked of a max time within 7 work-days. However, this highly depends on the question character.
- List: Partners expert roles:

Expert Field / Role	Partner
Business management	IG,
Intellectual Property	UGOT,
Marketing	SKEMA, WR
BusinessPlanning	IE
New VentureCreation	SKEMA
Entrepreneurship	IE, SKEMA
Ethics	UGOT

Fundraising	EM, WR
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- List: Contact Info

Partner/expert	Contact person/info:
1 inno AG	
2 IEUNIVERS	Name Aleksios Gotsopoulos Title Assistant professor of entrepreneurship Email <a href="mailto:Aleksios.Gotsopoulos@ie.edu">Aleksios.Gotsopoulos@ie.edu</a> Phone +34-658-658-714
3 UGOT	Name Magnus Eriksson Title PhD Email <a href="mailto:magnus.eriksson@gu.se">magnus.eriksson@gu.se</a> Phone +46736793354
4 SKEMA	Name Philippe CHEREAU Title Professor of Strategy and Entrepreneurship Email <a href="mailto:philippe.chereau@skema.edu">philippe.chereau@skema.edu</a> Phone +33(0)493953299 Mob. +33(0)687268889
5 engage	Name Tomt Lenz Title Innovation Manager Email <a href="mailto:t.lenz@engage-ventures.com">t.lenz@engage-ventures.com</a> Phone +49-721-9134511
6 APRE	Name Bruno Mourenza Title Mr Email <a href="mailto:mourenza@apre.it">mourenza@apre.it</a> Phone +39 (0)6 48 93 99 93
7 QPlan	
8 WhiteRese	Name: Efthymios Altsitsiadis Title: Dr. Email: <a href="mailto:info@white-research.eu">info@white-research.eu</a> Phone: +32487545284
9 EuropaMed	Name Gabriella Lovasz Title Managing Director Email <a href="mailto:gabriella.lovasz@europamedia.org">gabriella.lovasz@europamedia.org</a> Phone +3614533801
10 inno TSD	Name Eva Fadil Title Email <a href="mailto:e.fadil@inno-group.com">e.fadil@inno-group.com</a> Phone 0033 4 92 38 84 17

- Several partners that have time allocation for this (helpdesk 3.5) task is flexible to be taken from another task if additional time is needed (e.g. some time from WP5 according to their time allocation to the advance service could be credited for helpdesk issues).
- Confidential business information might not be a problem in most countries, however this is a major problem in Sweden where we are under the publicity law setting.
- Partners have to be involved in the expert pool only to the extent that this is justified by their funding to do so.

*Open Forum*

- Open for all H2M participants.
- Predefined different thematic subject areas.
- Initially, there will be a few main topics in the forum. According to the extent of user demand the open forum could be leveraged to more specific training topics and fields of interest.
- There will be an opportunity for all actors/trainers to have access to this open forum through their user account. This forum will be moderated by internal H2M expert team.
- Moderation should only be provided in connection to the training sessions (online and offline)
- There should be general forum rules, for instance user behaviour etc.
- Administrator/s should support/operate the forum during the project. These may be the same people as for the technical support team. They are however not the expert team and do not need to reply to questions.

## 3 DEVELOPMENT PLAN

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### 3.1 Time Plan 2013

11 Mars

Development plan sent to EM, SKEMA and IE, for comments.

20 Mars

Helpdesk Questionnaire sent out by UGOT to H2M partners based on the development plan and comments.

1 April, when the website starts

Deadline Questionnaire

Analyzing results of the Helpdesk Questionnaire

22 April

Create a concept of Helpdesk and send out to H2M partners for comment

1 May

Deadline for comments

8 May

Concept of helpdesk completed and initiating set up of the helpdesk primarily by EM. The ambition is to launch the helpdesk a.s.a.p. with a deadline 1 August 2013.

1 August, when the training starts

- Open Forum in operation
- Contact Form and Expert Pool in operation
- FAQ for H2M participant in operation
- Continuous development and update of FAQ and Expert Pool during the project