

◆ Abstract

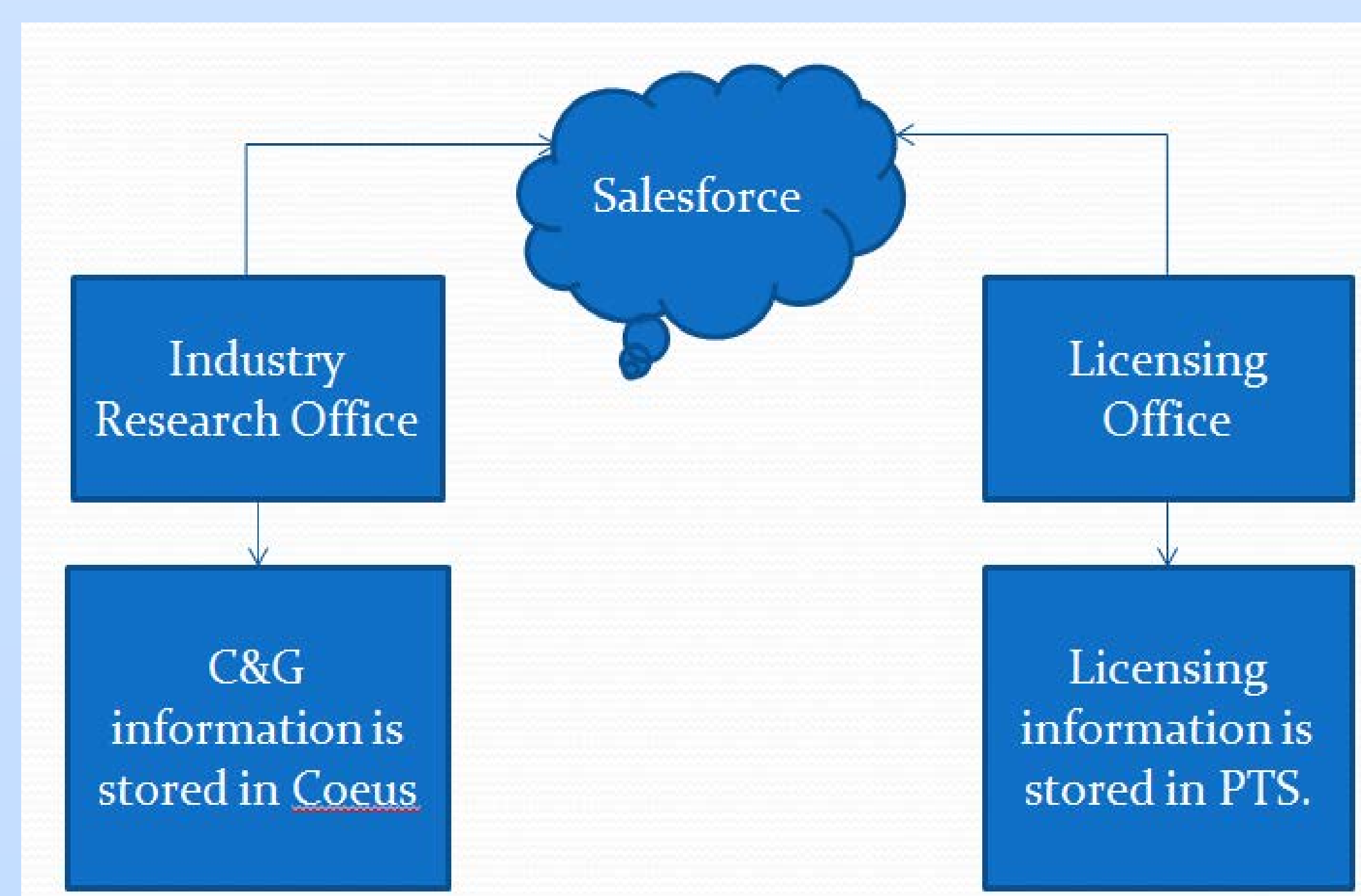
The UC Berkeley Office of Intellectual Property and Industry Research Alliances(IPIRA) is developing a technology solution in Salesforce to enable our team to 'improve and streamline' identified business processes in order to boost our contract management, business development, and reporting capacity. This solution will be used by all members of the IPIRA team to facilitate shared information, effectively track workflows to improve customer service.

In addition to this, the in-built Marketing automation tools in salesforce would enable our department to have extensive marketing for the available technologies and bringing increased funding to the campus.

◆ Introduction

The Industry Alliances Office is currently storing business critical information in Filemaker database, and double-entering data into the university's sponsored research database of record, Coeus. The Office of Technology Licensing is storing all its proprietary invention, patent, licensing and company information in a legacy application at University of California office of President called "Patent Tracking System"(PTS). Hence IPIRA has taken a new initiative to build a robust IT system by creating a salesforce platform for the two offices.

◆ Bridging the gap



◆ Project Plan :

- (1) Organize focus groups and communicate with people from both the offices and understand their daily activities and workflows.
- (2) Sketch out the workflows which can be automated.
- (3) Evaluate the use of marketing tools.
- (4) Understand various database locations for the desired data.
- (5) Prepare a detailed requirements document for the workflows
- (6) Evaluate data integration options for salesforce with different databases.

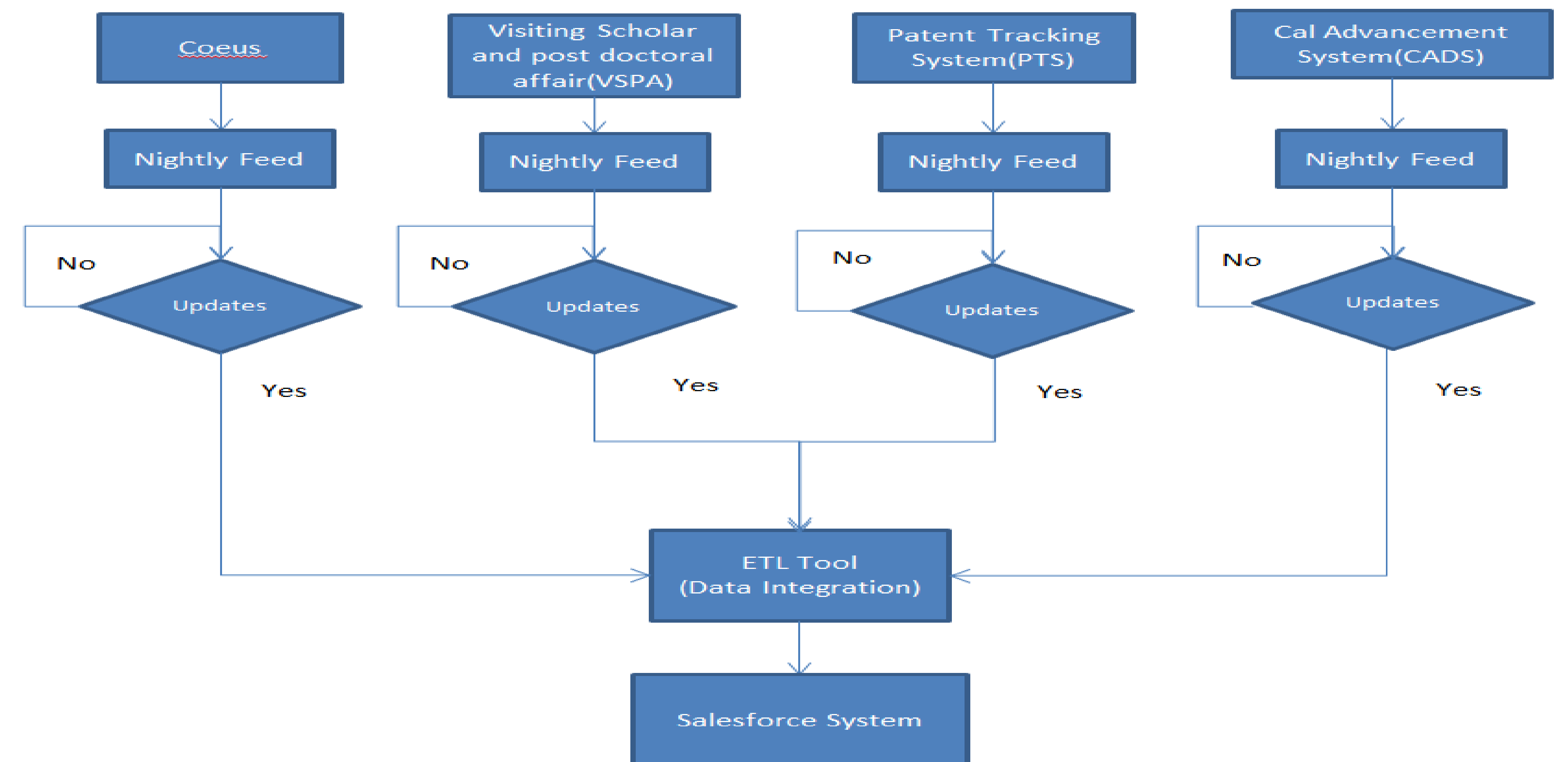
In Progress:

- (1) Build the solution followed by data migration

Future:

- (1) Go-live on Aug 6,2014(Estimated)

◆ Workflow:

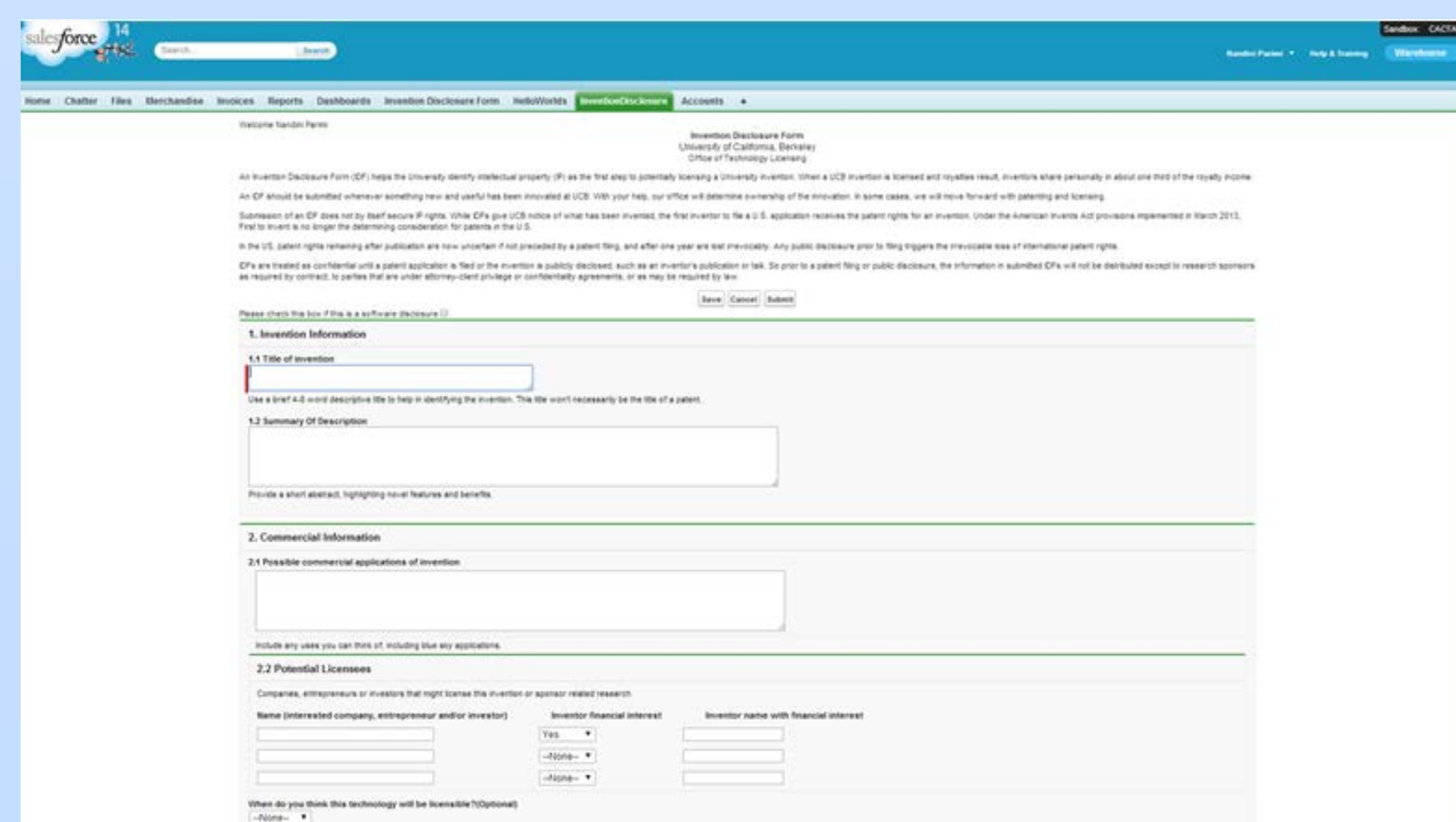


◆ Advantages

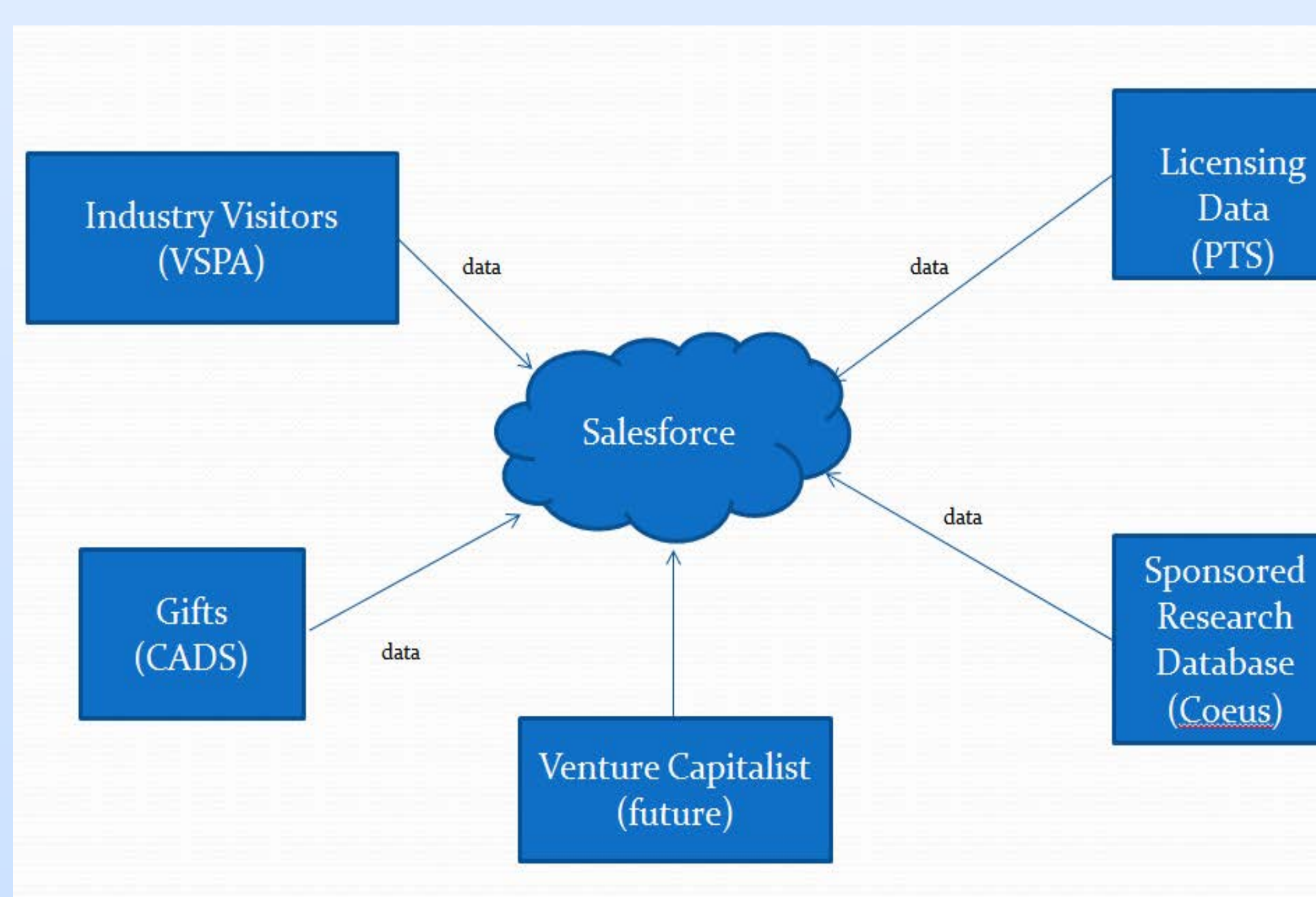
◆ Cross-sharing across IPIRA



◆ Online invention disclosure form



◆ Cross-sharing across Campus



◆ Marketing



◆ Goals

- (1) Introduce first-ever online invention disclosure for the UC System.
- (2) Saving time and effort by automating manual process across IPIRA.
- (3) Giving the researchers an ability to track the status of their inventions.
- (4) Provide ability to track industrial activity on campus.
- (5) Identify potential opportunities through cross sharing critical business information(event notes, contacts etc.)
- (6) Outreach to industries through the excellent marketing tools provided by salesforce and thus increasing the incoming funds.
- (7) Emerge as a leader driving innovation across UC.

◆ Acknowledgements

We have been working collaboratively with multiple units on-campus, we would like to acknowledge Office of Technology Licensing, Visiting Scholar and Postdoctoral Affairs, Cal Advancement System, Research Administration and Compliance – IS and UC Office of President for their on-going support.