



## Negotiating Knowledge Transfer Teaching Toolkit

Negotiating Knowledge Transfer Syllabus .....	3
Intended Learning Outcomes (ILOs) .....	3
Methods & Materials .....	4
Lesson Plan .....	5
Trainer Instructions: How to run the “Joint Venture ” roleplaying exercise.....	7
Before the Session .....	7
During the Session .....	8
Debriefing .....	9
Trainer Introduction to Role-Play Exercise: From Lab to Market Alignment Meeting..	10
Issues to Be Discussed.....	11

### Additional Print Out Materials (Not in this document)

-  Confidential Briefs for Role-Play – Joint Venture
-  Confidential Briefs for Patent Licensing Negotiation Role-Play
- Negotiation Module - Slides

## **KTSofSkills - Soft Skills for Knowledge Transfer - Project n. 2022-1-IT02-KA220-HED-000089663**



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# Negotiating Knowledge Transfer Syllabus

**Duration:** Approx. 4 hours

In today's dynamic innovation landscape, successful knowledge transfer depends not only on technical expertise, but also on the ability to navigate complex stakeholder interests, build lasting partnerships, and create win-win outcomes. This course is designed to equip knowledge transfer professionals – whether in academia, research, or industry – with essential negotiation skills that drive impactful collaborations.

Through a blend of real-world case studies, interactive exercises, and role-play simulations, participants will learn how to prepare strategically for negotiations, manage power dynamics, handle conflicts constructively, and influence effectively across sectors. Whether you are negotiating licensing agreements, research partnerships, or internal alignment, this course will help you build confidence, clarity, and control at the negotiation table.

## Intended Learning Outcomes (ILOs)

### General objective

This course aims to equip knowledge transfer professionals with essential negotiation frameworks, tools, and strategies to navigate complex deals in research, licensing, and technology transfer contexts. Participants will enhance their ability to prepare effectively, negotiate confidently, and grow their personal negotiation style through reflection and practice.

### Specific ILOs

- ILO–1: Understand the everyday negotiations that affect knowledge transfer activities

- ILO-2: Understand core negotiation principles and frameworks, including interest-based and integrative negotiation models relevant to knowledge transfer settings.
- ILO-3: Develop structured negotiation preparation techniques, including goal setting, BATNA, ZOPA, and deal framing.
- ILO-4: Conduct negotiations involving intellectual property, licensing terms, and technology transfer with greater clarity and confidence.
- ILO-5: Reflect on personal negotiation style and biases by developing a professional growth plan.

## Methods & Materials

### Teaching Method(s)

- Group discussions & peer feedback
- Role-playing simulations
- Frontal Lecture


### Required Learning Materials (during-course)

- Course slides
- Confidential Briefs for the Role-play exercise

### Additional Learning Materials

- “Getting to Yes: Negotiating Agreement Without Giving In”, by Roger Fisher, William L. Ury and Bruce Patton
- “Never Split the Difference: Negotiating As If Your Life Depended on It” by Christopher Voss
- “Give and Take: Why Helping Others Drives Our Success” by Adam Grant

# Lesson Plan

20 min	<p><b>Introduction</b> - Trainer introduces the session objectives and participants play a quick icebreaker game.</p> <p><b>Icebreaking Game: “How do you feel?”</b> The trainer shows a slide with various photos and asks each participant to pick one that reflects how they feel and explain why.</p>	Group discussion
30 min	<p><b>Mock Negotiation Exercise</b> - Participants engage in a role-play negotiation scenario with minimal instructions.</p> <p>1-dimensional negotiation case that looks like a fixed-pie problem (the more one side gets, the less the other one has). This could be a monetary issue, share split, etc. This simulation aims to introduce the competitive nature of negotiations.</p> <p><a href="#"> Confidential Briefs for Patent Licensing Negotiation Role-Play</a></p>	Role-play activity
20 min	<p><b>Debrief &amp; Reflection</b> - Discussion on negotiation strategies used, challenges faced, and emotions experienced.</p>	Group debrief
20 min	<b>Break</b>	-
30 min	<p><b>Key Negotiation Concepts &amp; Techniques</b> - Trainer introduces</p> <ul style="list-style-type: none"> <li>• What is a good outcome?</li> <li>• BATNA, ZOPA, and negotiation tactics</li> <li>• Position-based vs interest-based negotiation</li> <li>• [Optional] Use objective criteria to separate issues and people</li> </ul>	Mini-lecture & Q&A

# SoftSkills

FOR KNOWLEDGE TRANSFER

75 min	<p><b>Guided Role-Play</b> - Participants do another negotiation exercise, applying learned concepts.</p> <p>This negotiation is more complicated with 4 issues. It is aimed to be a group negotiation (2 vs 2). Each party should have clear alternatives to introduce BATNAs. Also, priorities should be clarified for an interest-based negotiation strategy.</p> <p>45 min preparation 30 min negotiation</p>	Structured role-play
30 min	<p><b>Debriefing</b> - Trainer and peers provide feedback on negotiation effectiveness. The trainer explains the differing nature of the issues and potential pathways for a win-win solution.</p>	Guided group discussions
15 min	<p><b>Action Planning &amp; Closing</b> - Participants create action plans to apply negotiation skills in real-life situations.</p>	Personal reflection

# Trainer Instructions: How to run the “Joint Venture” roleplaying exercise

## Before the Session

- ☐ Read all the materials
  - ☐ Confidential Briefs (2 Roles)
  - ☐ Trainer Introduction to Role-Play Exercise (below in this document)
  - ☐ Slides
- ☐ Print out confidential briefs for the class
- ☐ Set up the room
  - Ideally, arrange separate spaces for each group
  - Make sure participants keep track of time

## **During the Session**

### **Introduction (5 minutes)**

Explain the purpose of the simulation (e.g., applying communication strategies, managing tension).

### **Preparation - Phase 1 (15 minutes)**

Give confidential briefs to each participant. If the number of participants is different than 6 people you can organise people in "2 vs 2" instead of "3 vs 3". You can also suggest 1 or 2 people participate as observers. Observers aren't actively involved in the negotiation phase but closely follow and take notes to discuss further at the end.

Emphasize the importance of active engagement, confidentiality, and staying in role. Participants should not disclose their confidential briefs to others. They can ask you questions if needed.

In this phase the group is separated into two: (1) University and (2) Company. They handle confidential briefs. As an instructor, your role is to make sure every participant understands the role and the simulation rules clearly.

### **Preparation - Phase 2 (25 minutes)**

This phase is required only if there is more than one negotiation table. If that is the case, participants are asked to go into separate groups to decide their strategy as a negotiation team.

### **Simulation (30 minutes)**

- Clarify the simulation time.
- Let participants engage freely without interruption.
- Walk around, observe dynamics, but avoid intervening unless needed.
- If necessary, give a 5-minute warning before time is up.



## Debriefing

### Introduction (5 minutes)

- Show the summary table
- Give participants feedback
- Show the debriefing questions to initiate further discussions

### Potential Solutions

Highlight the fact that this is an integrative bargaining. When parties understand the potential trade-offs between different issues, the possibility of expanding the pie increases. There are 2 alternative paths that create more value than meeting in the middle for each issue separately.

**Option 1:** Trade-off between Investment Contribution and the combination of equipment and location.

**Option 2:** Trade-off between Equipment and Location. Location is more important for the university while equipment is more important for the company. Discovering this asymmetry can create more value for both parties.

## Trainer Introduction to Role-Play Exercise: From Lab to Market Alignment Meeting

**The University of Novaris** is home to a leading-edge research lab in quantum materials. Over the last four years, a research team at the **Advanced Materials Lab** has developed **QuantumX**, a novel material that enables ultra-low energy data storage at room temperature. This breakthrough has the potential to revolutionize data centers, computing, and mobile technologies, reducing energy consumption by over 70%.

**PhotonEdge Inc.**, one of the leading companies in emerging memory technologies. In order to stay on top of a highly competitive and innovative industry, the company is constantly searching for recently emerging technologies that can give a competitive edge. This was the reason why PhotonEdge team approached **the University of Novaris**.

Both parties recognize the high potential of the technology but also acknowledge that significant R&D effort is needed to move QuantumX from a lab prototype to a scalable product. After a series of exploratory meetings and a successful joint pilot project, both parties recognized the value of a Joint Venture (JV) co-founded by two organizations.

Previously, parties have already agreed on several fundamental issues such as share splits, revenue sharing schemes, and IP ownership. In the upcoming meeting, they must now negotiate and finalize four operational aspects of the Joint Venture.

### Participants

<b>The University of Novaris</b>	<b>PhotonEdge Inc.</b>
Head of Technology Transfer Office	VP of Strategic Innovations
University Legal Counsel	Company Lawyer
Head of Advanced Materials Lab	Unit Head of R&D

Your task is to come up with an agreement on all 4 issues. If you can't agree on all the issues, the negotiation will not be valid.

Please see the scorecard on the last page. Your main goal is to get as many points as possible. If you get less than 100 points, the deal is not valid.

## Issues to Be Discussed

Issue	Options	Uni.	Co.
<b>Investment</b>	€ 200 000 University, € 1 800 000 Company covers	85	5
	€ 500 000 University, € 1 500 000 Company covers	75	10
	€ 700 000 University, € 1 300 000 Company covers	45	15
	€ 1 000 000 University, € 1 000 000 Company covers	20	20
	€ 1 300 000 University, € 700 000 Company covers	15	45
	€ 1 500 000 University, € 500 000 Company covers	10	75
	€ 1 800 000 University, € 200 000 Company covers	5	85
<b>Equipment &amp; Software</b>	Company software & hardware	15	75
	University software & company hardware	20	65
	3rd party software & hardware	25	25
	Company software & university hardware	55	20
	University software & hardware	65	15
<b>Location of the R&amp;D Centre</b>	University Campus	75	15
	Close to university	65	20
	In the middle	25	25
	Close to company	20	55
	Company Campus	15	65
<b>Student Engagement</b>	Paid Internships within the Venture	10	10
	Thesis Collaborations	15	15
	Startup Fellowship or Entrepreneur-in-Training Programs	25	25
	Research Assistant Roles on Joint Projects	10	10
	Joint Skills Academy or Certificate Programs	5	5