

**workbook**

# ALUMNI

in knowledge and  
technology transfer



**better  
together!**

**INTEGRATING ALUMNI INTO  
KNOWLEDGE AND  
TECHNOLOGY TRANSFER?**

**Yes, that's how it works!**



**Concrete ideas, suggestions  
and experiences to create  
synergies between alumni work  
and knowledge and technology  
transfer and to strengthen  
each other.**

**Time to get better together!**

**Let's start.**



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## FOREWORD

Knowledge and technology transfer (KTT) is becoming increasingly important in universities and scientific institutions, so that many different strategies and measures are being developed in this area in order to optimise what already exists, but also to break completely new ground.

A major field of activity is the **professional evaluation and utilisation of market-relevant research results** and the professionalisation of the KTT units in this regard.

Against the background that the human resources as well as the required range of market knowledge in the KTT units are usually limited, the Karlsruhe Institute of Technology (KIT) and the Helmholtz Centre Dresden-Rossendorf (HZDR) have jointly sought new approaches and identified „alumni“ as a target group that has so far been underestimated and needs to be investigated.

On the one hand, alumni are characterised by the fact that, after leaving their academic institution, they have usually gained **complementary knowledge and experience in very different professional fields over many years** and have also built up their own networks here. On the other hand, they know their former institute, university, or research institution very well - thematically and culturally – and, in many cases, are intrinsically motivated to „give something back“ for their good education and in memory of good times.

In this project, KIT and HZDR have systematically investigated the potential for KTT that alumni thus fundamentally possess, and in doing so have also found, among other things, that pioneering work is being carried out with this question not only in Germany, but also in other European countries:

- 
- Is it possible to integrate alumni, with their specific expertise and networks, into the operational day-to-day processes of a KTT unit in a motivated and enriching way?
- 
- What prerequisites and offers need to be implemented for sustainable realisation?
- 

In this workbook, the results of the four-year project are presented in a practice-oriented way – with the aim of giving other institutions inspiration and ideas for incorporating this approach into their own strategies.



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Dr.-Ing. Jens Fahrenberg



*Björn Wolf*  
Dr. Björn Wolf

## Project Partners

In order to reflect different conditions and possibilities in the project and thus also to create a broader framework for the transferability of results to other institutions, the consortium was deliberately chosen from two very different institutions:

With around 9,000 employees (including 6,000 research assistants) and 24,000 students, KIT the research university in the Helmholtz Association is one of the large scientific institutions in Germany. KIT has a long tradition in both technology transfer and alumni work (around 25,000 registered alumni). In 2017, i.e., during the project period, various events led to the two responsible departments also being brought together under one roof and one management, which once again provided additional opportunities for experimentation.

The Helmholtz Centre Dresden-Rossendorf (HZDR) is a smaller institution compared to KIT, with about 1,200 employees. At the beginning of the project, the HZDR did not yet have any systematic alumni activities, but it did have many close relationships with the surrounding universities – especially the TU Dresden. Thus, the project focus here was on building a new alumni network specifically geared towards supporting the HZDR's transfer activities.

The range of different approaches, challenges and experiences against this backdrop are contained in this workbook and are also intended to serve differently positioned universities and scientific institutions to help themselves individually from the toolbox of tried and tested formats.



We would like to thank the Federal Ministry of Education and Research (BMBF) for funding the research project „Establishing and testing alumni networks for evaluation and exploitation processes in science-related technology transfer“ from 2016 to 2020. One result is the workbook presented here. We would also like to thank the project management agency DLR for the excellent, trust-based cooperation at all times.

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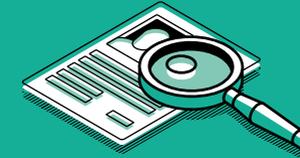


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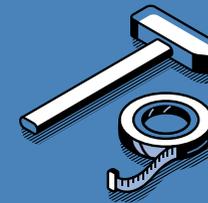
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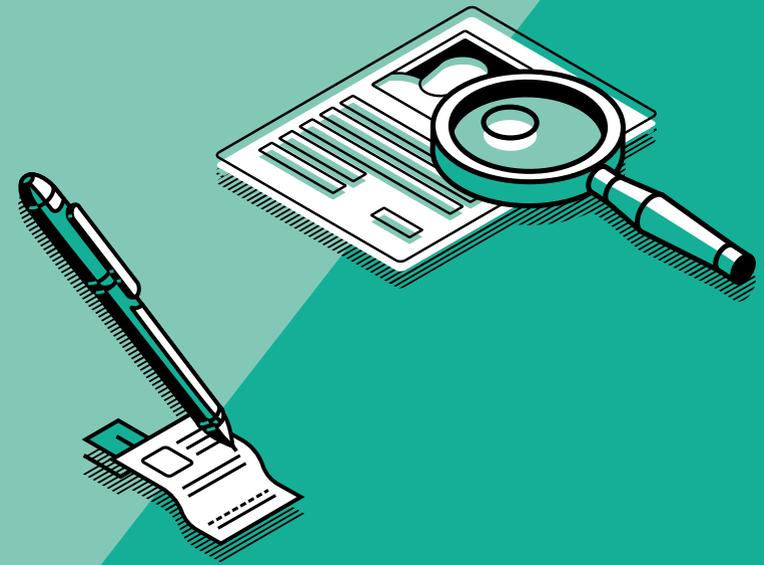


MARKETING AND POOL OF IDEAS

BASIS

TOOLBOX

# BASIS

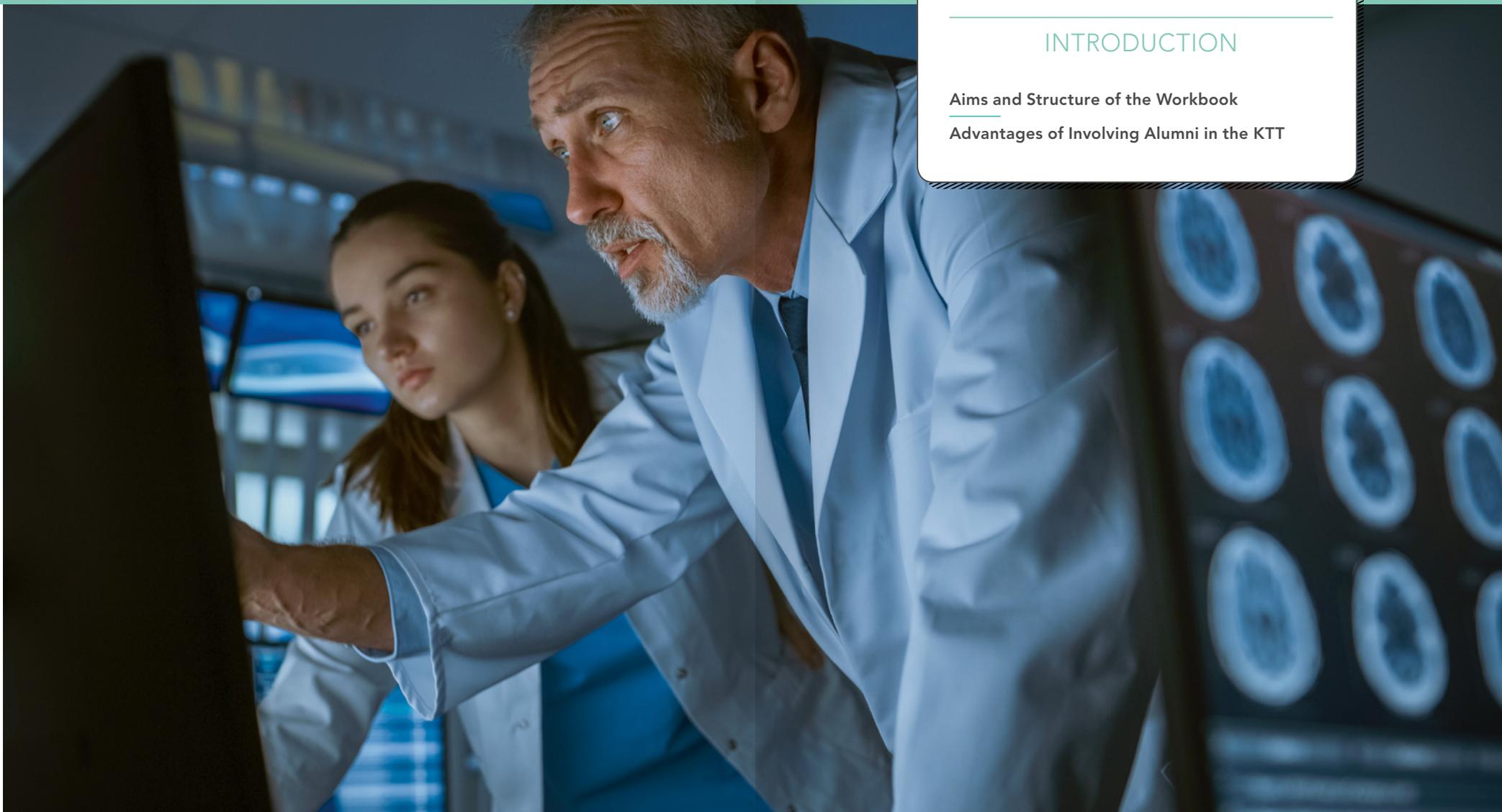




## INTRODUCTION

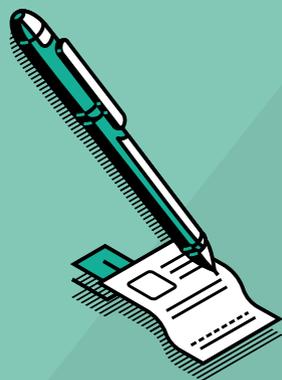
**Aims and Structure of the Workbook**

**Advantages of Involving Alumni in the KTT**



## Introduction

In the introduction, information on the goals and structure of this workbook is presented. Furthermore, an overview is given of the advantages that result from the involvement of alumni in transfer activities.



## AIMS AND STRUCTURE OF THE WORKBOOK

### Aims

This workbook is intended to serve as a source of information as well as a source of inspiration and motivation for all scientific institutions in order to utilise potential and create **synergies at the interface between alumni and transfer.**

The organisational and structural conditions are very different in every institution, as are, in particular, the skills and competences that the personalities involved bring to the table.

The workbook shows that there are possibilities and ways to use untapped potential to bring alumni and transfer work together for all types of conditions. All the measures and experiences presented serve as suggestions that everyone can and should adapt to the conditions of their own institution. What works well and easily in one institution may not work in the next. The workbook does not claim to be exhaustive, but represents a kind of **catalogue of suggestions.** What is certain, however, is that investing in efforts is worthwhile for everyone involved: for the alumni themselves, for alumni and transfer work and thus for industry and society as a whole.

### Distinction between "Alumni Guide" and "Alumni in Knowledge and Technology Transfer"

An important basic assumption of this guide is the existence of alumni work in the institution. Depending on the intensity and characteristics of alumni work, a wide variety of measures can be derived. However, it is necessary that access – of whatever kind – to alumni of the institution is possible. Based on this, the ideas and suggestions for involving alumni in transfer activities should be understood.

If there is no alumni work at your institution yet, you will find many hints, tips and guides on how to set up and establish an alumni network, for example, on the website [www.alumni-clubs.net](http://www.alumni-clubs.net). This is the umbrella organisation for alumni organisations at universities. There are regular regional meetings of the networks, which are announced here as dates. Interesting guides are available under Services. It is also helpful to find out how other universities and scientific institutions have gone about setting up their alumni networks.

The direct exchange with those responsible for established networks holds great potential for insights and findings on how you could proceed in your own institution.



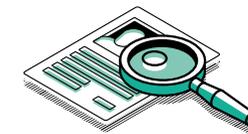
FOOD FOR THOUGHT

No matter how an institution is set up in terms of the possibility of alumni and/or transfer activities – bringing together alumni and transfer work is interesting in all of its forms and offers exciting possibilities as well as synergy effects.

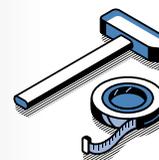
## The Structure

The guidebook is designed in the form of a workbook and is divided into two main sections. In the **BASIS** section, general and preparatory measures and activities that are important for the success of the integration of alumni in transfer activities are highlighted. In the second section **TOOLBOX**, concrete tools and activities are presented in a total of three parts. In the first part, these are aimed at all alumni. The second part deals with tools and activities that involve a selected group of alumni in transfer activities. The third part presents accompanying internal and external marketing activities as well as a pool of further ideas and possible activities. The contents of this guide are based on literature research, interviews with alumni and the collection of national and international best practice examples. Based on this, measures and activities were designed that have been carried out and tested by one or both of the project partners, so that the empirical values and lessons learned are included in the presentation here. Subsequently, a pool of further ideas and possible activities is presented on how alumni can be integrated into the transfer work. These could not be tested during the project period, which is why no empirical values are available.

**BASIS**



**TOOLBOX**



## ADVANTAGES OF INVOLVING ALUMNI IN THE KTT

Involving alumni in transfer work offers many options and advantages, both for alumni work and for transfer work. These advantages apply to all the tools presented.

### Advantages for Alumni Work

The bond between alumni and their alma mater is further strengthened. By involving them in various ways, alumni are shown appreciation and given the opportunity to get involved and help shape the future. It also fulfils another wish of alumni to stay informed about what is happening at their alma mater, especially in the area of research, after they themselves have left the institution.

### Advantages for Transfer Work

Alumni can contribute their experience, their competences and their know-how as industry and sector experts and support both the researchers and the employees in the transfer work with professional advice. Their assessment plays an important role in the selection and development of market-relevant innovation and transfer projects. In addition to providing feedback and experience from industry, alumni also act as door openers, as they all have their own networks that they can introduce. An important task of transfer work is also the dissemination of information. Involving alumni expands the circle of people who are informed about transfer activities and concrete offers many times over. Not only the alumni themselves receive the information, but also their own networks, to whom they independently pass on information that is of interest.

This ensures mutual benefit, whereby the present workbook will focus in particular on exploiting the potential of alumni for transfer work.

On the one hand, you can use the benefits listed above to motivate and **convince different circles of people**. On the other hand, they can be incorporated into websites or promotional material depending on the group of interest (alumni, employees).



FOOD FOR THOUGHT



## BASIS FOR SUCCESS

Initial Conditions in the Institution

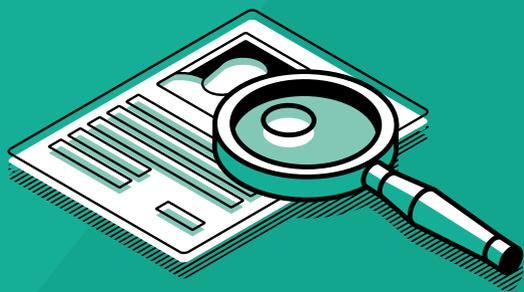
Obtaining an Overview

Communication and Cooperation



## Basis for the successful involvement of alumni in knowledge and technology transfer

The following are general recommendations that are important for the successful implementation of activities and measures – those presented here and beyond. These are based on the experience gained during the implementation phase of the activities within the project.



## INITIAL CONDITIONS IN THE INSTITUTION

### Mindset of the Organisation

Overall, it is important that there is a certain degree of openness and interest in the integration of alumni in the transfer work with regard to the attitudes and convictions of the organisation. This determines and shapes the actions of the people in an organisation. At the beginning, a certain rethinking may be necessary. The more pronounced the alumni and transfer culture is in an organisation as a whole, the easier it is to implement the activities presented here. In addition to the basic convictions of TT work, this also includes valuing networks and openness to change in communication, e.g. through the use of social media. In reality, there is usually a lot of „room for improvement“ here.

**Basic assumption for this workbook:** A certain degree of openness to cooperation and change is present in the institution, which can be built upon. Internal marketing is of great importance in order to make continuous progress here.

#### ↗ Internal Marketing

Always integrate **upward communication** into your considerations to increase the visibility of your measures in the presidium/rectorate/senate of your institution.



FOOD FOR THOUGHT

## Resources

In order to bring about change and further development of transfer activities, resources, both human and financial, are necessary. It can be assumed here that, detached from the existing mindset of the organisation and the participants as a whole, minimal resources rather than large pots of money are available. It is difficult to say how much time and financial outlay should be planned for each of the activities presented in the following, as the amount of resources to be put up is person- and institution-specific. Where possible, an indication or tendency is given. However, a detailed assessment is not given, as the prerequisites vary in each institution, such as whether or not there is a communication expert in the team, etc.

Independently make an **individual assessment of each activity** for your own institution based on the respective possibilities and resources and define their costs.

In this assessment, take into account the extent to which resources can be used efficiently through **dovetailing or combining with existing formats** and through cooperation with other units.



FOOD FOR THOUGHT

All in all, it can be said:  
The greater the idealistic encouragement  
and resource support from above,  
the more successful the activities are.

## OBTAINING AN OVERVIEW

### Organisational Framework Conditions

An important recommendation is to take enough time to obtain an overview of the organisational framework in which the alumni are to be integrated into the transfer work through various activities. This also includes being clear about the responsibilities within the organisation.

**Use our checklists on the following pages!**

The better the overview of the initial situation, the more efficiently alumni can be integrated into the transfer work. In addition to setting up new activities, there is great potential to integrate alumni into existing structures, processes and activities and, conversely, to place transfer topics in alumni work.

#### Tips for gaining a good overview

- Take enough time.
- **Add** to the list **continuously**, even while you are already implementing it.
- Try to meet and exchange ideas with as many people as possible.
- **Visualise connections and offers with mind maps** etc.

## QUESTION CHECKLIST

# 1

### Clarify Structures

---

How are alumni work and transfer work structurally related in my organisation?

---

Which person is responsible for what?

---

Which other bodies within my organisation are important to consider, e.g. the Senate, etc.?

---

Which contact persons do I already know? With whom should I enter into exchange?

---

How are the respective teams structured?

---

Who is in charge of what?

---

Where are there possible subliminal challenges or people whose toes should not be "stepped on"?

---

Who should definitely be "brought on board"?

---

How should different areas be distinguished from each other?

#### FOOD FOR THOUGHT



In addition to getting a general overview of **structural and organisational framework conditions**, you will take a closer look at **data protection, legal aspects as well as procurement and awarding**. The earlier you obtain an overview here, the better. The implementation of some possible activities/measures could otherwise be delayed until the clarification of data protection and other legal matters has taken place. This may result in very long periods of time. **Add the topics that are relevant to you to the listed areas.**

## QUESTION CHECKLIST

# 2

### Align Data Protection

---

What are the current regulations?

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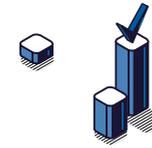
How does my organisation behave?

---

Who are my contacts?

---

What issues can I already think of that I should consult someone about?



Here we go!  
Here is space for notes...

## QUESTION CHECKLIST

# 3

### Consider Legal Aspects

---

What should always be kept in mind here?

---

Who are the right contacts for which topics?

---

What are the limits from a legal perspective?

### Check Procurement and Awarding

---

Who takes care of which procurements (e.g. hardware vs. software)?

---

How long do certain procurement processes take?

---

How much lead time is necessary in each case?



What else would be important?

## QUESTION CHECKLIST

# 4

### Existing Formats

In the next step, it is important to get an overview of existing formats in both worlds: alumni and transfer. In this way, by combining and integrating what already exists, the potential for synergies can be optimally exploited.

---

Which events and formats already exist? Who has been invited to these until now?

---

What offers are there in alumni work?

---

What activities have been used in transfer work so far?

---

Which channels of communication are used, e.g. social media, digital formats, print formats, etc.?



Add your findings, questions  
and tasks here...

## COMMUNICATION AND COOPERATION

It is essential for the successful implementation of all projects to create and establish positive and constructive cooperation and communication within one's own department and across departments.

There is no magic formula for getting everyone directly involved „on board“. It takes tact, perseverance, transparency, openness, positivity and good arguments to win over and motivate those involved.

An important building block for successful communication is to collect and make oneself aware of the **advantages, benefits, opportunities and potentials that lie in the respective activities and in the overall mission/vision.** This is especially important in and for the exchange with sceptical stakeholders.

The implementation phase showed how sceptics turned into supporters and how important constant communication is. This includes, on the one hand, speaking openly about concerns and, on the other hand, pointing out the possibilities and communicating success stories. It is important to be aware of possible closed doors, because they do exist. However, it is even more important to know that they can be „nudged“ and thus opened. This works best with people's own positive experiences or with reports from third parties about positive experiences.

Creating acceptance and participation among one's own organisational members is a very big and crucial building block. Without this foundation, even the best activity and action will face great challenges. Achieving this works through constant communication. This can be supported by internal marketing.

### ↗ Internal Marketing

The greater the sense of working together on the issue, the more successful the implementation of activities/cooperation. One person alone can drive things forward, but success is always based on the interaction of many!

In particular, the cooperation between the two teams – alumni and transfer – is highly relevant for the success of the activities. Therefore, it is worth investing in the **creation of a framework that enables and ensures a structured and long-term exchange between the transfer and alumni teams.** Initiating and following up meetings and bringing together the responsible persons as well as creating a pleasant climate for exchange are of great importance here.

### Overarching Tips

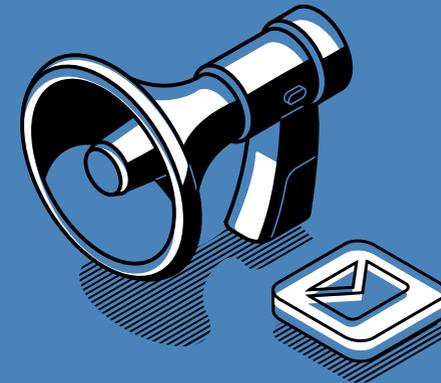
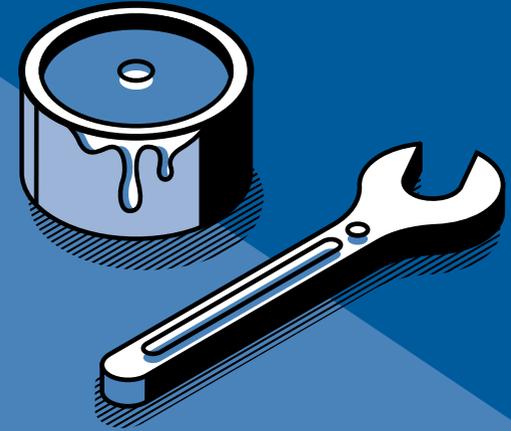
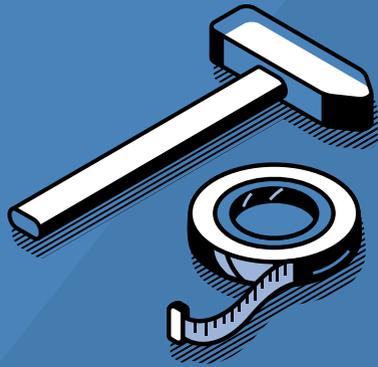
- Always reflect on your own way of communicating and stay positive!
- To be well prepared, think about:
  - What triggers scepticism?
  - Who are sceptics and how does scepticism differ according to the group of people (TTO staff, alumni staff, researchers) so that you can respond and communicate appropriately?
  - What other hurdles might arise?
  - How can you overcome each of these?
  - What advantages, benefits, opportunities, potentials etc. does “the whole thing” offer?

- Make sure that everyone involved has a positive experience through the integration of alumni in the transfer work, especially the sceptics!
- Take concerns seriously and try to refute them with arguments.
- Integrate success stories into your communication.
- Communicate, communicate, communicate!
- Create a sense of community within the circle of stakeholders.
- Bring the participants to the same table again and again and encourage them to work together in a constructive way.



FOOD FOR THOUGHT

# TOOLBOX



## Toolbox – the activity construction kit

The following section of the workbook covers concrete activities and measures that have been implemented in the institutions involved in the project. They are the result of discussions and best practice examples. They are adaptations or new activities. All the tools presented were set up with the aim of serving the interests of both sides – alumni and transfer.

The toolbox can be divided into three parts. In the following, we present all related measures, tools and activities.

### Part 1:

Tools are presented that are aimed at **all alumni** of an institution. Here it is shown once again how great the potential of combining what already exists is.

### Part 2:

For the tools in the second part of the toolbox, it is a prerequisite that a selection of alumni takes place. In this guidebook, we will refer to these **alumni as „transfer alumni“**.

A more precise definition as well as the possibilities to establish this group are listed.

### Part 3:

The third part of the toolbox takes a closer look at **marketing activities**. You will find both inward-looking and outward-looking possibilities here. Furthermore, we offer you additional ideas for possible tools in this topic area.

## BENEFITS FOR THE PARTICIPANTS

### Overview of Interests and Benefits for Alumni and Transfer Alumni

The following table provides an overview of the benefits for the alumni themselves and for the transfer activities of your institution. At the same time, the benefits here represent the interests and expectations that those involved bring with them in each case and which can be addressed with the following tools. You can include them on a website, for example, for the respective target group (alumni or transfer) or communicate them as needed.

#### Alumni

**Supporting** the alma mater with own expertise, specifically support for researchers and the Technology Transfer Office team

**Promoting** the implementation of research results and shaping the future by accompanying innovation projects and contributing knowledge

Making new contacts through events and various exchange formats and staying in touch with each other as well as with the alma mater  
→ **Network expansion**

Gaining **insights** into current research topics  
→ **Stay up to date**

#### Transfer

**Exchange** with industry professionals  
→ Other insights

Access to **industry knowledge** and market-relevant information

Expansion of own **networks**

**Finding** expert **guidance**, support and partnership

**Growing together** with industry

Dissemination of information to exciting **target group**



## TOOLS FOR ALL ALUMNI

### **Transfer Magazine(s) in Alumni Networks**

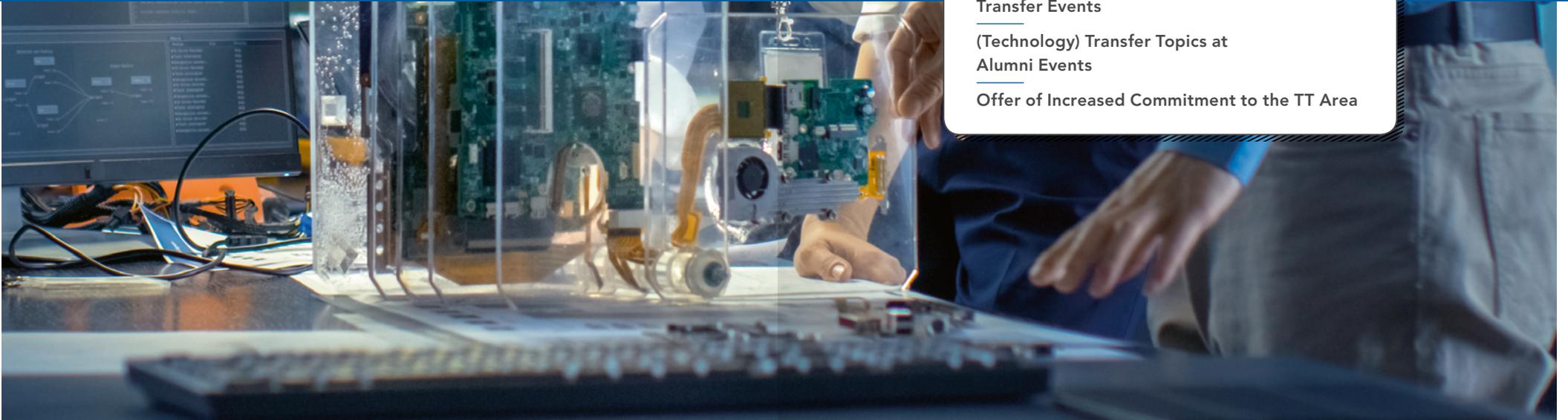
#### **Combination of Communication Tools**

- Transfer Topics in the Alumni Newsletter
- Combination of Website Content
- Joint Use of Social Media

#### **Alumni at Existing (Technology) Transfer Events**

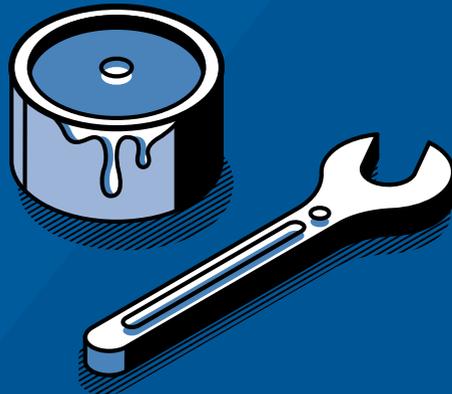
#### **(Technology) Transfer Topics at Alumni Events**

#### **Offer of Increased Commitment to the TT Area**



## Tools for all Alumni

In the following section, activities and measures are presented in which all alumni of an institution are involved in transfer activities. A close look at existing offers plays a major role here, as there is great potential in combining existing offers and expanding them to include the alumni target group.



## TRANSFER MAGAZINE(S) IN ALUMNI NETWORK

Increase your subscriber base to specific media, such as transfer mailings or transfer magazines, by making subscription options easily available to your institution's alumni. This can increase the reach of transfer content, such as technology offers, many times over.



WHAT

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· Include the option to subscribe to a transfer magazine or various transfer magazines directly in the alumni registration form.

---

· Promote the magazines in alumni newsletters.

---

· Link the subscription option on the alumni website.



HOW

Good communication, especially between technology marketing and the alumni department, is a crucial success factor for implementing this measure. Find out which transfer magazines exist, on the one hand, and through which channels this offer can be made available to alumni, on the other.



TIP

**This measure has great potential with low expenditure of resources.**

## COMBINATION OF COMMUNICATION TOOLS

An important task in alumni work is to stay in touch and exchange with alumni. Therefore, there are many possibilities and channels to do this. Use them to place and spread transfer topics. This gives alumni work the opportunity to make exciting topics available to alumni.

### Transfer Topics in the Alumni Newsletter



WHAT

Take the opportunity to integrate your own current transfer topics into an existing alumni newsletter. In this way, you achieve a spread of transfer content and increase the reach of transfer information...



HOW

Establish a new section in the alumni newsletter, such as "Transfer"/"Technology Transfer"/"Knowledge and Technology Transfer". The Transfer team will take care of providing the content for this new section. For example, include two topics from the transfer area each month, such as news about innovation awards, new transfer projects, technology offers, etc..



TIP

The cooperation between the Alumni Office and Technology Marketing is particularly relevant for this measure. The decisive success factor here is regularity. Cooperative and continuous collaboration enables a good arrangement of deadlines etc. in order to be able to establish a routine. Make this possible again and again!

**This measure has a great impact with "low" expenditure of resources. There is added value for alumni and transfer work.**

### Combination of Website Content

To increase the reach of transfer topics and, on the other hand, to provide alumni with a wide range of information, use the embedding and linking of transfer topics on the alumni website.



WHAT

Advertise events from the transfer area on the alumni website.

Links to other transfer areas are also possible, as is information about, for example, a technology exchange including a technology alert, a transfer blog or, as already described above, the subscription offer of transfer magazines.

Information can also be provided here about opportunities for involvement. [↗ Tools for Transfer Alumni](#)



HOW

The cooperation of the Alumni Office and Technology Marketing is also particularly important in this measure. A joint view of the possibilities and the sounding out of ideas holds a lot of potential. Along with the integration and combination of contents and the agreements, the establishment of contact with short routes, for example, for updates, etc. aids success. Arrange follow-up appointments so as not to lose contact.

**This measure also offers the result of high output with little effort and enables a higher reach.**



TIP

## Joint Use of Social Media

An important part of alumni work is communication via social media (Xing, LinkedIn, Facebook, Twitter, etc.). Therefore, these platforms offer a lot of space to integrate transfer content or to exchange content. There is also the possibility of establishing new campaigns or input series.

A special feature here is that not only current alumni but also future alumni are informed about transfer topics and sensitised to them.

## Content Integration and Exchange

Not only websites offer space for the integration of transfer topics, but also the use of the alumni channels in social media. This allows you to feed in short-term as well as long-term topics and spread them to a very large group of people. At the same time, it provides alumni with up-to-date information from their alma mater.

- 
- Use the opportunity to promote events from the transfer area short-term or with campaigns lasting several weeks.
- 
- Inform alumni about offers from the transfer area and about current developments in transfer projects so that the target group is always kept up to date.
- 

Exploit this huge potential for yourself. A brief familiarisation with the "do's & don'ts" of social media is worthwhile. Regular exchange between the alumni and transfer offices contributes to success. The quicker both offices integrate the exchange into their daily processes, the less effort is required and the quicker the reach is increased...



WHAT



HOW



TIP



## WHAT

## New Campaigns / Transfer Input Series

In addition to the possibility of feeding in content on demand in a timely manner or planned application campaigns, you can establish regular transfer series for various social media channels in order to further distribute content from the transfer area. For this, check which transfer content is suitable for the creation of a new regular posting series and design it with a recognition value.



## HOW

- For example, you can use your institution's technology offerings for regular posting series.
- You can also prepare the content of your own innovation magazine accordingly.

It is worthwhile to prepare the content of the posting series in such a way that a recognition value is created. This is helped by appropriate wording, such as "Tech Tuesday", regularity, as well as graphic, consistent presentation and the use of hashtags. Here you can establish new hashtags that link transfer, innovation and your institution, such as #techtransferKIT.

In order to implement this measure successfully, in addition to the continuous cooperation of both areas, good planning in advance is particularly important so that a "well-rounded concept" can emerge. Nevertheless, do not plan to perfection, but get started. The fast pace of social media makes it possible to make adjustments again and again.

The implementation phase has shown that adopting the processes and steps of the stakeholders into their daily routines takes time, but the results are very successful. Keep bringing people together and reminding them of the common goal.

**This measure also achieves a very large effect with not too much effort, as many people are reached via social media. Receiving information via social media is very popular with the target group, and regularly feeding in transfer topics enables the alumni work to provide substantial information.**



## TIPS

## ALUMNI AT EXISTING (TECHNOLOGY) TRANSFER EVENTS



### WHAT

These activities are about physically involving alumni in innovation topics. To do this, obtain an overview of existing events with transfer relevance. This includes your institution's own events as well as events attended by your innovation managers or other transfer employees. Proactively invite alumni to these events. If possible, it is a good idea to provide a separate supporting programme for alumni or to make exclusive offers possible.

### Innovation Day

The integration of alumni at an innovation day of your institution offers many possibilities and a great deal of potential. Some ideas are listed below:

- Separate, personal invitation to the event, e.g. by email
- Presence of the alumni team, e.g. with a stand at the event to exchange ideas and get to know each other
- An exclusive, guided tour through the exhibition of innovations
- Designating and reserving tables for lunch for alumni, so that networking is possible for this target group
- Side offers, such as a campus tour



### HOW

## Exhibitions

Transfer employees frequently attend trade fairs themselves. Depending on the size and range of topics of the fair, many alumni will also be there as representatives of their companies. This fact can be used in various ways.

- For example, inform your alumni that you will also be there with a stand from your institution and that they are welcome to drop by or arrange meetings in advance. The latter is also possible if the transfer employees themselves will only be present at the fair as visitors.
- It is also possible to arrange a dinner together.
- If the possibility exists, exclusive offers, such as a guided tour on certain topics/contents, are also conceivable.
- At various fairs, it is possible to obtain a ticket contingent that can be made available to alumni, for example.



### HOW

## Communities

Innovation managers and transfer actors from various scientific institutions regularly exchange information on transfer and innovation topics in different regional and national communities. Here, too, there is the opportunity to involve alumni in discussions and to use synergies between alumni and transfer work. This supports the initiation of cooperation and increases the efficiency of knowledge and technology transfer processes.



HOW

- 
- Host a meeting of the respective community at your institution and invite your alumni to it. You can also promote your alumni network here.
- 
- It is also interesting for the transfer community to get to know the instruments of technology transfer in your institution as clearly as possible, e.g. through a presentation by a spin-off alumnus, i.e. a researcher who founded his or her own company from innovative research with the help of the transfer team.
- 

Use these opportunities to integrate your alumni. In particular, integrating them into your own existing events is simple and effective, is well received and ensures a positive response. The alumni feel valued and, in return, the level of awareness of transfer topics among alumni can be further increased.

For successful implementation, good cooperation between the alumni, transfer and event teams is promising. The presence of the alumni team, for example with its own stand, has the side effect of attracting new members.

The willingness of transfer staff to make appointments at trade fairs is necessary, as is good communication in advance about the possibilities and the presence of the transfer team. Try to win them over for this in good time!



TIPS

**Integrating them into your own existing events is simple and effective, is well received and ensures a positive response. The alumni feel valued and, in return, the level of awareness of transfer topics among alumni can be further increased.**

## (TECHNOLOGY) TRANSFER TOPICS AT ALUMNI EVENTS



### WHAT

Use existing alumni events to place transfer topics when the opportunity arises. Large annual alumni meetings are just as suitable as smaller, regional alumni meetings.



### HOW

- Include a presentation by a transfer employee who reports on the life of the innovation team at the alma mater.
- Show your presence as a transfer team at regional alumni meetings and be available for exchange on site.
- For example, make it possible for alumni meetings to include a tour of a production hall or similar.



### TIP

Let the two worlds merge and use the content potential of transfer topics to create synergy effects. By integrating transfer topics at alumni events, you can deliver exciting content and thus spread and receive feedback. Hold personal discussions and take advantage of the alumni's great interest in transfer topics by directly obtaining assessments and opinions on them. Depending on the size of the event, close cooperation between the alumni, transfer and event teams is also an important and promising prerequisite here.

**This measure also holds great potential, as alumni events are already established and can thus be fed with transfer content with little effort.**

## OFFER OF INCREASED COMMITMENT TO THE TT AREA



### WHAT

In order to better integrate alumni into transfer activities, you can create a special offer for alumni. This is intended to address all those alumni who are explicitly interested in and want to get involved in knowledge and technology transfer. In order to be able to take advantage of these offers, alumni must first express their interest. You can obtain this in various ways.

There are several ways in which alumni can be offered involvement in transfer topics, e.g.

- become a member of a network set up specifically for this purpose
- join a special interest group that has been formed
- check boxes in the alumni registration form to register interest in possibilities of involvement



### HOW

The examples given here can be extended, supplemented or modified to suit your organisation. How exactly this can be done is explained in more detail in **➤ Tools for Transfer Alumni**.

Communicate the integration and the associated procedures as a special feature for the alumni team, which can expand its activities with an attractive offer.

**Depending on the decision on the extent to which the separate offer is designed, this is associated with an initial high investment in resources. However, this is worthwhile due to the positive response and the quality of support from the alumni.**



### TIP



## TOOLS FOR TRANSFER ALUMNI

### **Establishment of a Transfer Alumni Group**

#### **Technology Assessment**

- Online Surveys
- Expert Involvement in Innovation Competitions

#### **Consulting / Expert Involvement for Transfer Employees**

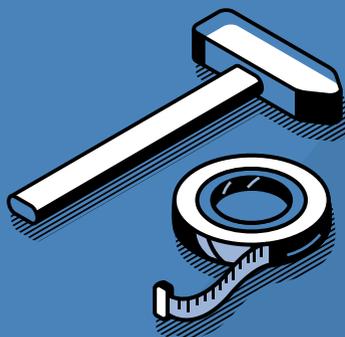
#### **Support for Researchers**

- One Question – One Conversation
- Longer-Term Support

#### **Lecturing**

## Tools for Transfer Alumni

In the following, measures and activities are listed that are aimed at a selected group of alumni. These are referred to as transfer alumni in this workbook.



Transfer alumni work in industry, are interested in technical innovations for business and in news from research, especially from their alma mater. They want to stay up to date and are motivated and willing to get involved in the transfer sector.

## ESTABLISHMENT OF A TRANSFER ALUMNI GROUP

In order to build up and retain this selected target group, there are various possibilities, depending, for example, on the size of the existing alumni network. The variants presented are options. Depending on the institution and the circumstances, it is possible to adapt, expand and modify how the transfer alumni can be selected in order to then offer them certain activities.

- Using the existing alumni database for specific needs and selecting the appropriate people through defined filtering.
- Integrating the query of interest in involvement into the alumni registration form.
- Founding a new transfer alumni network
 

**Investing in communication and retention activities is particularly important here, e.g. with the help of the following possibilities:**

  - The creation of a dedicated website including a key visual to increase the recognition value
    - one appealing possibility is, for example, the integration of an explanatory video.
  - Creating your own regular newsletter or circular with different categories, e.g. "News from the network", "New developments", "Latest news".
  - Creating a LinkedIn group to provide information, create a group feeling and allow members to network with each other.
  - Separate invitations:
    - for example, to events such as your own network meetings
    - as well as exclusive invitations to existing events, such as the institution's annual celebration.

## Tips when setting up a new transfer alumni network

### Be aware of the importance and relevance of providing a secure framework.

This includes clarifying and regulating legal matters such as data protection or conditions of participation.

- Allow sufficient time for this!
- Seek support from the relevant experts in your institution (your own as well as other departments).
- Avail of the possibility of using a condition of participation (incl. inclusion of points such as confidentiality) as well as a data protection declaration, according to the current standards.
- Many challenges can be circumvented if you include alumni in your network as private individuals. Communicate this transparently and point out to the alumni when they register in the network that the activities within the scope of their membership are on a voluntary basis, personal, and unpaid in the sense of "civic engagement".

Create a **registration form** that gives you the opportunity to request information about the alumni's experience and expertise.

- Take enough time for this as well!
- Question and discuss the contents of the form with various people within your team as to which information about the alumni is relevant for the KTT activities.
- Ask your institution's data protection department to approve this form.



FOOD FOR THOUGHT

- Maintain your **data** well and continuously!
- Make the information about the network members **easily accessible** to your team. Additional preparation of the information, e.g. in the form of profiles, can also be helpful.
- If your organisation works with a **customer relationship management system**, add a new category or function to this system that can be used to note with the alumni in this database that you are a member of the transfer alumni network.
- Be **creative, think outside the box** and dare to break new ground – it's worth it! It doesn't matter if you are thinking about formats, naming, or "calling into being" new hashtags. Think new and forward and talk openly with a wide range of people to develop ideas!
- Take into account and use the fact that network members **recommend your network** to others.
- For the success of your network, **good integration within your own team** and your whole institution is very relevant, i.e. plan time and resources for internal marketing! **For more information, see the ↗ Internal Marketing section.**
- The more **personal** the level at which you communicate with members, the greater the feedback and stronger the retention effect. For example, individual Christmas emails are one possibility.

- Remember that **external marketing** also plays an important role in making your network known and successful.  
**For more information, see the ↗ External Marketing section.**
- There is a great willingness on the part of alumni to **give something back** and get involved in the KTT sector. Therefore, plan appealing activities and take this knowledge into account in everything you do.
- **Keep bringing the relevant people within your institution together**, also in a structured way, as this is of great importance for the success of your network.



#### FOOD FOR THOUGHT

No matter how the transfer alumni are selected, it is of particular importance to maintain a good and personal exchange with them. The most essential thing is constant exchange and good networking both internally and externally, as well as good cooperation with a wide variety of bodies both inside and outside the institution.

## TECHNOLOGY ASSESSMENT

### Online Surveys

The transfer alumni use anonymous, web-based surveys to provide feedback and suggestions from industry. The evaluation of the presented research ideas or technologies takes into account their industry expertise and know-how. This can be, for example, assessments regarding application, further development and marketability.



WHAT

**The surveys consist of two parts: Presentation of the research idea/technology and questions on further development and further procedure.**

At the end of the survey period, the results are evaluated, discussed with the researchers and transfer employees, further steps are derived and a short report is written for the transfer alumni.

These surveys can be conducted several times (approx. 2–5 times) per year. The presentation, including answering the questions, should take about 15 minutes.

### Presentation of an example process flow:

- First joint meeting: Exchange between the researcher and the innovation manager in order to clarify where to go, to point out the potentials and to discuss a common procedure.
- Creation of PowerPoint slides by the researcher.
- Various feedback loops until the slides are completed – important content:
  - Introduction
  - Status quo
  - Presentation incl. scientific components of the technology
  - Pointing out advantages
  - Outlook on further steps and possible hurdles or open questions
- Joint development of questions that are relevant for the further utilisation process.
- Create an online survey using survey tools such as Unipark, LimeSurvey, SosciSurvey, etc.



HOW

### Tips for the process

- Use this tool, as implementation is possible even with few financial resources and still provides valuable input for further steps!
- Select a suitable project in cooperation with the innovation managers.
- Work together with the innovation managers and researchers in the preparation of the presentation and questions and bring them to the table again and again.
- Depending on the personality and experience of the researchers, close supervision may be necessary. See yourself as a project manager in the planning, execution and implementation of an online survey.
- The phase of creating and conducting an online survey takes time. Be sensitive to the priorities of the researchers.
- Keep reminding yourself and the participants of the side effect of online surveys: spreading information about the existence of this technology. This will also initiate contacts and expressions of interest.
- Do not let initial scepticism on the part of the researchers deter you, but meet it positively and with good arguments, e.g. with examples of good practice and previous successes!



#### TIPS

The creation and implementation requires commitment from various participants, especially in terms of time resources, and is not a tool that can be used in the short term. However, it should be emphasised that this tool provides valuable input for further next steps, on the one hand, and on the other hand increases the dissemination in many different directions.

*"All interested parties receive an evaluation of the results as well as information on the further progress of the projects."*

*"You get the unique opportunity to gain insights into the latest technologies and developments."*

### Benefits for the Transfer Alumni that you can communicate:

*"The researchers receive valuable feedback through you and benefit from the industry knowledge of potential customers and users, so that they can further develop their ideas in a targeted and market-oriented manner."*

*"You can actively engage in the project if you are interested."*

*"You will have the opportunity to benefit from the industry knowledge of potential customers and users so that you can further develop your ideas in a targeted and market-oriented manner."*

*"You get the unique opportunity to receive valuable feedback directly from industry on your developments."*

### Benefits for the researchers and the transfer team that you can communicate:

*"After the survey has been completed and evaluated, you will receive the processed survey results, which you can use in your further research."*

*"The experts can express their interest in actively engaging with your topic during the survey or in the follow-up."*

## Expert Involvement in Innovation Competitions



### WHAT

The transfer alumni are involved as jurors in innovation competitions within the academic institution. As jurors, they should hold a managing director or other senior managerial position in their own company or another company in order to bring the necessary business background and business knowledge to the evaluation of the innovative ideas.

**The innovation competitions are usually held once a year.**

By including transfer alumni in the jury, the ideas can be evaluated together with the transfer alumni to determine the extent to which the ideas have potential for exploitation on the market. The jurors evaluate the ideas. This can take place, for example, in the context of a workshop where the ideas are presented and evaluated live.

### Illustration of the example procedure

- The transfer alumni who could be considered for inclusion in the innovation competition should be selected and personally approached before the competition call begins. Managing directors, in particular, have their schedules planned well in advance.
- If the innovation competition takes place within the framework of a workshop, it should be ensured that the alumni are informed about the exact course of the workshop three weeks before it takes place.



### HOW

### Benefits for the transfer alumni that you can communicate:

*"You will be familiarised with the latest ideas and technologies of your alma mater and can decide for yourself which technology you consider promising in order to support it further after the competition or help it to be used in industry."*

*"Serving as a juror is a responsible role that demonstrates your appreciation of your alma mater."*

*"In this way, you will be involved in transfer processes from the very beginning."*

- The jurors are provided with an evaluation template to evaluate the ideas (e.g. live on the workshop day).
- A joint meeting or another joint event (e.g. a joint dinner) of jurors and participants frames the innovation competition. Alumni also need an invitation to this in good time in order to plan their participation.

### Tips for the procedure

- Remember to have the alumni sign a confidentiality agreement, as they will come into contact with unprotected technologies in the scientific institution. This is very important.
- When advertising the innovation competition on posters, the Internet or social media channels, point out that alumni are participating.

**Take advantage of the opportunities for involvement by transfer alumni, as implementation is possible with few financial resources, but important feedback is provided for further action!**



### TIPS

## CONSULTATION / EXPERT INVOLVEMENT FOR TRANSFER EMPLOYEES



### WHAT

The transfer alumni are available to the transfer team (innovation managers, licence managers, ...) as contact persons for concrete, non-daily questions from their field of expertise. They advise and contribute their expertise, experience and network in an open and trust-based exchange. Contact is made on an ad hoc and uncomplicated basis by email, telephone or in the form of a personal meeting (also possible digitally).



### HOW

In conversations between transfer alumni and transfer employees, for example, assessments and information as well as new approaches or similar can be requested with regard to industry relevance. Likewise, an assessment with a view to the national/international market in the respective industries is conceivable. Based on the valuable insight into certain industries or markets, the marketing process of a technology can be advanced, for instance. In addition, for example, through support with valuable feedback, a project can be driven forward in a targeted and efficient manner in the "right" direction after an exchange. Furthermore, suitable contact persons and a referral to the appropriate contacts can take place within the framework of an exchange. For example, a contact for innovation managers in industry can be established directly and easily. Strategic decisions can also be made substantiated by external knowledge.

### Tips for the procedure

- Create a trust-based framework so that constructive and open exchange between the transfer alumni and your colleagues is possible.
- Adapt the time frame and the choice of communication channels to the needs of both sides!
- Make it clear to your colleagues how great the willingness and motivation on the part of the alumni is, so that the offer is also taken up internally.
- Stay in constant contact with your transfer colleagues so that you are informed about issues and projects and can always bring the network into play as a "solution approach", especially at the beginning. Find other ways to create the basis for the network to be known and used within your transfer team. This also applies to the other possibilities.
- Communicate good practice examples again and again, also promote communication and the passing on of profitable and positive experiences through exchange with the transfer alumni within your circle of colleagues, so that any initial internal scepticism can be transformed into enthusiasm.
- Be present and support your colleagues in the matching process. This means: help to find the right alumni expert for the specific concerns and non-ordinary questions of your colleagues.



### TIPS

This tool can be flexibly adapted to the needs and questions and can be used with little resource expenditure.

The support of the transfer alumni can be obtained directly.

*"You get the unique opportunity to gain insights into the latest technologies and developments."*

*"A trusting, close connection with mutual exchange of information is established between you and the KTT employees of your alma mater."*

**Benefits for the transfer alumni that you can communicate:**

*"Through your support, the technology transfer team gains valuable insights into specific industries or markets. This can support strategic decisions as well as advance the commercialisation process of a technology."*

*"The KTT employees (indirectly also the researchers of the institution) gain valuable insights into certain industries or markets through the support of the transfer alumni. This can aid strategic decisions and advance the commercialisation process of a technology."*

**Benefits for the researchers and the transfer team that you can communicate:**

What else could be added?



## SUPPORT FOR RESEARCHERS

### One Question – One Conversation



#### WHAT

The transfer alumni are available to the researchers of your institution for individual questions concerning their research/ projects as industry experts, e.g. in relation to industry relevance, and contribute their expertise, experience and network. The selection of suitable transfer alumni takes place in cooperation with the transfer employees. The exchange is uncomplicated and takes place once by email, telephone or in person.



#### HOW

Researchers from your institution contact you with a specific question or the question develops in a joint consultation with you. To answer the question, a transfer alumnus is consulted, who is selected and approached based on the information provided and personal experience with the alumnus. The alumnus will openly and confidently assist you and the researcher with any questions that may arise that are not part of everyday life. This involves short assessments.

### Tips for the procedure

- Always keep this possibility in mind as an option in the counselling interviews with researchers and inform the researchers about it.
- Get a good overview of the researchers' initial situation and the current status of the project so that you can select the appropriate transfer alumnus. In addition to the data in your database on the transfer alumni, also include personal experiences through networking activities.
- Communicate to the researchers that you support them in their exchange with transfer alumni.
- Ensure an open basis for exchange by communicating with both sides individually before bringing them together.



#### TIPS

An internal awareness of the transfer alumni is a basic requirement for this tool. After a certain initial build-up and start-up phase of the transfer alumni group, this tool can be used in an uncomplicated way and therefore has great potential with low resource expenditure!

*"You can support the researchers at your alma mater even if you have little personal time."*

**Benefits for the transfer alumni that you can communicate:**

*"You can let the project teams benefit from your detailed industry knowledge and help make targeted decisions."*

*"The valuable feedback can, for example, support and drive the marketing process of your technology/project and strategic decisions."*

**Benefits for the researchers and the transfer team that you can communicate:**

*"You have the opportunity to obtain an assessment and information on your issue in a confidential setting."*

*"You receive prompt and short answers to your questions."*

## Longer-Term Support

The transfer alumni are available to the researchers of your institution as companions or supporters with their expertise and competence for their research/project for a defined period of time. In the case of innovation projects, the aim can be to drive forward the final development steps towards a possible transfer to industry. Founding teams, on the other hand, can receive entrepreneurial support. Support in the context of applying for funding projects is also possible. The duration of the support can be adapted to individual needs and can also change over the course of the project. The form of the exchange – in person or digitally – is discussed together.

During the collaboration, a wide variety of questions and needs can arise on the part of the researchers. In addition to the support that the transfer team can provide, the knowledge and know-how of external transfer alumni can be used. For example, a transfer alumnus can accompany and support the preparation of a section in a funding proposal on marketing activities. It is also conceivable to provide transfer alumni to accompany the participating teams in an innovation competition. Regardless of whether it is an innovation project, transfer project or start-up team, the transfer alumni will provide them with sound support in finding their way into the business world. Through this cooperation, possible time-consuming or expensive "detours" can be avoided. This also creates enormous potential for the researchers, as they can expand their own network, since the transfer alumni also intensively contribute their own contacts.



WHAT



HOW

### Tips for the procedure

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· In order to be able to make a suitable match, it is important to get to know both sides very well – both personally and from the professional side. Telephone the transfer alumni in advance and discuss expectations etc. with them. Ask the researchers to share their expectations with you as well. Take your time and always remain open and transparent.

---

· For the ↗ **matching process**, we recommend that you proceed step by step:

- Get an overview of the initial situation on the part of the researchers and ask them about their expectations.
  - Search the transfer alumni database and select three to five suitable transfer alumni.
  - Prioritise them together with the researchers (make sure they remain anonymous)!
  - Afterwards, first contact the "first choice". Report on the request and the expectations. For example, make information such as project outlines, CVs, LinkedIn profiles, etc. available. And ask whether the researchers are willing to accompany you. Also clarify what form of contact the transfer alumni would like to have with the researchers.
  - Inform the researchers that they may contact the transfer alumni and provide the contact details.
  - Keep in touch with both sides in order to stay informed about further arrangements and next joint steps.
- 



TIPS

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· Make sure to communicate again and again that "everything is possible, nothing is necessary" is very important for the joint cooperation – for and on both sides. Also communicate that getting to know each other for the first time does not entail a commitment.

---

· Take concerns or fears seriously, especially on the part of the transfer alumni that expectations cannot be met.

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· Also make sure to obtain mutual consent.

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· Be particularly aware of the potential offered by the networks of transfer alumni, as they can be used to a great extent here.

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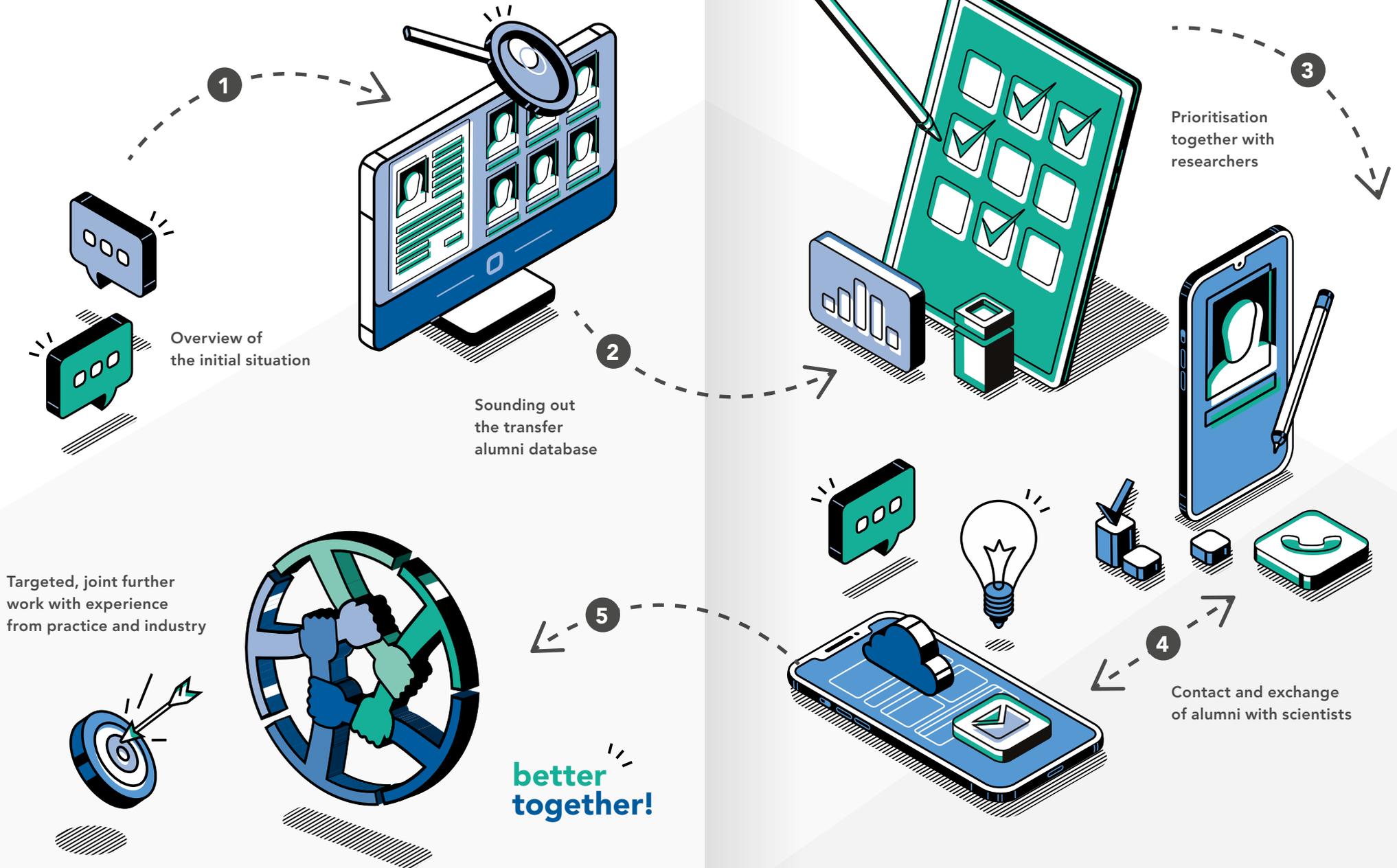
· Above all, check with the researchers whether contact has been made with the transfer alumni in order to avoid embarrassing moments and to maintain motivation on the part of the transfer alumni for the future.

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TIPS

### The matching process





## TIPS

- **IMPORTANT:** Find out about and network with other programmes in your institution in other departments, such as mentoring programmes for early career researchers with a focus on life and career path planning. Offer to open your membership pool to them. There is a great willingness on the part of alumni to get involved here, and a separation of content between research or career, etc. is not present in the minds of alumni in particular, but is seen as support overall.

An internal awareness of the transfer alumni is also a basic prerequisite for this tool. Long-term 1:1 support is a very profitable tool for the respective researchers and can be adapted to the different, individually available resources of the transfer alumni.

*„You have the opportunity to promote and strengthen project teams at your alma mater with your support and can share your passion for innovation.“*

*„By contributing your experience, you get the opportunity to actively participate in projects and contribute to their success.“*

### Benefits for the transfer alumni that you can communicate:

*“You will help project teams benefit from your detailed industry knowledge and make targeted decisions.“*

*“You have the opportunity to be supported and strengthened in your project by an industry expert in a trusting environment and to obtain first-hand assessments and information on your questions.“*

*“With the support from industry, funding applications can be formulated in an application-oriented way.“*

### Benefits for the researchers and the transfer team that you can communicate:

*“Through the valuable feedback and detailed industry knowledge, a research project or a start-up project, for example, can be advanced and supported in a targeted and efficient manner.“*

*“If necessary, the cooperation with transfer alumni can facilitate access to expressions of interest.“*

## LECTURING

As industry experts, the transfer alumni contribute their expertise as speakers at workshops, discussion rounds or events at their alma mater. They share their experiences with the audience, provide insights into their professional practice and are available as discussion partners.



WHAT

The workload of this commitment depends on the event format as well as the personal capacity and willingness of the transfer alumni. New formats are conceivable as well as the integration of transfer alumni into existing formats, e.g. at the institutes themselves.

There are various ways of integrating transfer alumni as speakers: self-organised, newly established and existing events as well as discussion groups, etc.

### Alumni Talks

Here, transfer alumni report on their current professional lives, provide insights into the business world and present their companies. After the talk, the researchers can exchange ideas with the speakers in a relaxed atmosphere. This format strengthens contacts with transfer alumni who have gone into industry. It also brings science and industry closer together. In the long term, interfaces can be created between the scientific institution and the companies in the region.



HOW

### Spin-off Alumni Meeting

In this format, the event takes place at a company that is a spin-off of the scientific institution. It is possible to combine the transfer alumni's talk with a tour of the company. All visitors to this event, e.g. other transfer alumni and spin-offs, are given the opportunity to exchange ideas with each other. The researchers involved in spin-off projects receive valuable tips for their own projects.

### Continuing Education Offers by Transfer Alumni for Researchers

This refers to seminars and workshops on transfer and business topics such as business planning, innovation management or sales and entrepreneurship. Through this special commitment of the transfer alumni, the researchers are taught important skills in these formats that are useful for their later careers. For a successful implementation of this tool, it is crucial to identify among the transfer alumni those who are suitable for conducting continuing education formats or who already offer this anyway. Checking this out and then implementing it is worthwhile!



HOW

### General tips on the process

- 
- On suitable occasions, continuously point out to both the transfer alumni and the researchers that they are welcome to contact you with their own suggestions and topics. Do not underestimate the potential of own ideas, which you might not have thought of yourself.
- 
- Realise that many transfer alumni see a request as appreciation when their alma mater asks them to give a talk and share experiences from their own lives.
- 
- Transfer alumni are highly motivated and enjoy imparting knowledge, insights and findings and sharing them with interested parties – make use of this motivation for your institution!
- 
- Good networking and passing on suggestions and ideas to the appropriate place, e.g. faculty, within your institution is enormously important and the basis for successful matching between transfer alumni and, for example, a faculty of your institution. Always emphasise how easy it can be to gain access to experts in the field.
- 
- Be aware of how important it is to lower the threshold on the part of researchers to approach you when there is a need or search for speakers who want to impart and share knowledge, insights and findings, new event format ideas, etc. **For more information, see the ↗ Internal Marketing section.**
- 



TIPS

- 
- If you are setting up a new format, make sure you do it regularly, at least two or three times a year. New events usually take a while to become successful. Keep in mind that the opportunity to exchange ideas on a regular basis is perceived as particularly beneficial for both sides, transfer alumni and researchers.
- 
- When establishing new formats, orient yourself to the structures and circumstances of your institution. Keep in mind that several departments are usually involved in the implementation for success and therefore good communication and cooperation is necessary.
- 
- Try out different things at the events and ask the participants for feedback, e.g. on the time of day the event was held or what they would like to see.
- 



TIPS

Involve the transfer alumni in appropriate events so that everyone can benefit from the valuable insights. The effort here is mainly in bringing the respective participants together!

**Benefits for the transfer alumni that you can communicate:**

*"In various formats, you shed light on different topics together with other interested parties and can thus broaden your field of vision."*

*"Your appearance as a speaker gives you the opportunity to talk to people from different fields of activity at the events and to expand your network."*

*"By including an industry expert as a speaker, you get the opportunity to talk to them at the events, exchange ideas with people from a wide range of backgrounds and expand your network."*

**Benefits for the researchers and the transfer team that you can communicate:**

*"In different formats, you can highlight different topics together with the industry experts and other interested parties and thus broaden everyone's field of vision."*



Here is room for notes...



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## MARKETING AND POOL OF IDEAS

**Internal and External Marketing**

**Pool of Ideas**

## Marketing and Pool of Ideas

In the following part of the toolbox, both internal and external possibilities for accompanying marketing activities are presented. Subsequently, further suggestions for possible tools are presented in an idea pool.



## INTERNAL AND EXTERNAL MARKETING

Constant exchange and good networking, both internally and externally, are important for the success of the tools presented here. Appropriate initiatives in internal and external marketing are therefore crucial for sustainable success and the associated visibility and acceptance of the selected .

### Overarching tips

- Explore all possibilities so that you can present and contribute your activities, your transfer alumni network and the associated offers at as many suitable opportunities as possible. Always keep your ears and eyes open.
- In both internal and external marketing, a large component and important success factor lies in good cooperation with the alumni department. Provide your alumni colleagues with materials to use as appropriate depending on the situation:
  - **For internal networking activities:**  
Materials on transfer offers
  - **For alumni events:**  
Materials on the possibility of becoming transfer alumni
- The more thoughtful the materials and suggestions you give your alumni colleagues, the better they will be able to position and represent your interests in the right place.
- Make the materials as a whole appealing and easy to understand. It is better to refer to further sources of information instead of overloading the materials.
- If you have the opportunity, always present a face as a representative of your activities. Both internally and externally, this contributes to a recognition value and to reduced distance when making contact and intensifies the bond with the different actors.



FOOD FOR THOUGHT

## Internal Marketing

In order for the key people within your institution to pull together and take advantage of the offers (e.g. including transfer alumni as speakers), knowledge of the existence of these opportunities is necessary: This is true for your direct team colleagues, employees of other service units and the researchers.

It therefore makes sense to develop marketing activities aimed at these groups of people and also to publicise and promote **your tools, your cooperation with the alumni network or the specific transfer alumni group** internally.

This additionally strengthens the general transfer culture in your institution.

In the following, you will find some **examples** of which form and which channels you can use for **internal** advertising:

## Explanatory video

Make an explanatory video that explains to members of your institution, from their perspective, who the transfer alumni group is, what it does and how it helps the scientific institution with technology transfer. In particular, highlight the benefits and opportunities for the researchers when using and perceiving the activities with the transfer alumni. Such an explanatory film helps to reduce scepticism.

## Website

Present your offers (e.g. online surveys, mentoring, lecturing, etc.) that you can provide with the help of transfer alumni on a website from the perspective of the members of your institution. For the communication of benefits for researchers, you are welcome to draw inspiration from the examples we have provided (these can be found in the presentation of the respective tools).

## Use of social media

Find out which social media channels your organisation's workers use to get information and place your offers there.

## Email banner

Create an email banner that employees of your transfer team or other members of your organisation can attach to their signature.

## Integration at events

Place your offers with the target group of researchers by integrating them into existing events at your institution or calling for their integration (e.g. doctoral colloquia).

Use your own transfer events, if they exist, to present the activities of the transfer team in general or arrange new formats that communicate your activities. Point out your offers and activities with alumni.

## Internal newsletters

Find out which internal channels are used to provide information to the employees of your organisation, such as internal newsletters or staff magazines.

Try to present your activities in an appealing way (e.g. in the form of an interview, with testimonials, etc.).

## Exchange meetings

Make a kind of "small road show" in your organisation. Research suitable interlocutors and arrange to meet them together. At these meetings, you can present your activities and offers and also gain deeper insights into the activities of other service units or institutes at your institution. Also include exchange with those responsible for other existing networks in your institution or other service units that are aimed at your target group. Networking with them creates enormous potential synergies.

Space for important  
additions



### Overarching tips for internal marketing

- Regular communication with other departments is essential for publicising your activities and ensuring their lasting success within your organisation. Make use of networking options. Actively initiate them and stay on the ball.
- Work together with your alumni colleagues. Keep each other informed about what internal meetings are coming up, what documentation is needed and make sure that your transfer alumni offerings are part of the comprehensive alumni offerings in your institution.
- Don't just network with other units and networks in your institution, but also make sure to work together in a way that fits the content, such as including your transfer alumni as mentors in other mentoring programmes in your organisation.
- Be aware of the importance of word-of-mouth in internal marketing. Researchers have their own internal networks to whom they can report positive experiences with and through your activities. Not only is keeping this in mind motivating, but you can also actively trigger the transfer to other researchers.
- Take advantage of the interest and motivation that many researchers already have. Inform them sufficiently and convince them with and of your activities. Since you only have limited resources available, focus your activities especially on researchers who you notice are open and interested in cooperating with you and your offers.
- When promoting your activities, take into account that the backgrounds of the people in your target group vary and that their attitudes and reactions can range from ignorance to scepticism to curiosity. Therefore, always use sufficient explanations and examples.

- Be aware that these internally directed activities always have an external effect as well, since all those with whom you work internally are sooner or later potential members of the alumni network and thus potential interested parties of the transfer alumni group. Your internally directed marketing activities will introduce employees of your organisation to the alumni network at an early stage.
- Keep in mind that your investment in internal marketing activities will also influence the general mindset of the institution and lead to a sensitisation of the issue within your institution.
- There is also a special side effect for the alumni team: Their visibility within their own institution is increased as well. Be aware of this, especially for conversations with the alumni team.



FOOD FOR THOUGHT

## External Marketing

In order to secure alumni for your transfer activities and for the commitment as transfer alumni, knowledge of the existence of these offers is necessary. Therefore, it is beneficial to establish marketing activities that target this group of people and lead to the visibility of your offers.

The following are ways in which you can draw attention to **your transfer alumni group**, in particular, and **the activities associated with** it. These largely relate to the promotion of a newly established group to transfer alumni.

### Website

Present your offers as well as the benefits from an alumni perspective (see under the respective tools) on a website. Maintain this website regularly and provide up-to-date news about activities that have taken place.

### Email banner

Within your organisation, various people communicate with external parties. Among them are often alumni – known or unknown. Create an email banner that draws attention to the transfer alumni group and make it available to all your colleagues who communicate externally. Ask them to use the email banner as they see fit.

### Use of social media

Find out which social media channels your organisation's alumni use to get information and place your content and offers there.

### Flyer

Design a flyer that refers to the existence of your transfer alumni group, which you can take with you when you make appointments, but which you can also give to other employees of your organisation or which you can display at events.

### Roll-up

A roll-up that you can place at physical events can also increase alumni awareness of your activities.

## Actively approaching alumni to become transfer alumni

Use the existing alumni database and compose an invitation mailing to alumni to become transfer alumni if they are interested. Repeatedly call for support as transfer alumni through various social media channels that actively target your institution's alumni. Show presence at alumni events and go to regional alumni meetings and present the activities of transfer alumni. Seek personal contact with alumni on various occasions and point out the opportunities for involvement as transfer alumni.

### Overarching tips for external marketing

- Pay attention to the importance of working with the alumni team. For "external parties", the structural organisational division of content within your institution (e.g. transfer vs. alumni) is not apparent or relevant – each of you represents their alma mater as a whole.
- Explore the established channels and especially use those used by alumni to reach those you are "looking for".
- Consider where interesting alumni can be found in your ecosystem, also in a regional sense, and try to network with them.
- Always make it clear to yourself and also to the alumni team that two further effects are triggered by advertising the activities for transfer alumni: the positive presentation of your institution's alumni activities and the recruitment of new members for the large alumni network.



FOOD FOR THOUGHT



A to-do list could be added here.

## POOL OF IDEAS

During the project, a pool of ideas was created based on insights into other fields, feedback primarily from alumni, transfer employees and researchers, as well as further considerations regarding previously unused potential. This pool contains suggestions for further tools and activities that can be implemented to create synergies between alumni and transfer work. This pool can be expanded to include many other activities.

Keep pointing out to the (transfer) alumni that they can contact you at any time with their own ideas and suggestions on how they want to/could get involved or what content and formats they would be interested in.

### Virtual Meeting and Exchange Talks

Virtual event formats hold great potential, especially for the commitment to be available as an advisor to the transfer employees and researchers of the alma mater. These meetings can be convened at short notice and are easier to integrate into the daily routine, especially for industry experts, because there is no need to travel. Discussions on specific issues, short presentations by researchers on a specific technology or topic with subsequent discussion or open discussion rounds to get an impression are conceivable here. The participants in these meetings can be selected each time according to the content – innovation and licensing managers, patent officers, researchers and (transfer) alumni. Depending on demand, these rounds can be opened up to other persons (groups) who fit the topic. Whether one participant or several, especially several (transfer) alumni, are invited depends on the goal of the respective meeting.

Consider the importance of creating low-threshold tools – little effort on either side and casual exchanges can bring great output.

## Series of Events

### Linking (transfer) Alumni and Transfer Team or Researchers:

If you already have your own transfer events in your institution where transfer staff and researchers come together and exchange ideas – perhaps in a relaxed atmosphere – consider opening these events to (selected) alumni and inviting them to attend. If you do not yet have such formats, it is worth thinking about introducing them. It is a good idea to meet away from the lab and desk – formats such as a "Transfer Breakfast" or a "Transfer After Work" meeting are conceivable.

With such exchange rounds, you can bring (transfer) alumni and researchers or transfer employees closer together and, at the same time, increase the visibility of your transfer office and the cooperation with alumni in your institution.

### Networking formats for (transfer) alumni:

- Transfer alumni open their doors to each other:  
Transfer alumni are a very open and committed group of people who would like to get to know each other better. It is conceivable to set up a series in which transfer alumni invite each other to their own organisations, for example, or meet and exchange ideas at certain well-known regional locations. Interested researchers and the transfer staff of your institution can be invited or can also participate in terms of content.
- Regional meetings:  
If there are several transfer alumni in different regions or countries, it is a good idea to hold your own events with these small groups. In addition to networking, knowledge and technology transfer topics of your institution should be placed and discussed here. Cooperation with the universities in these regions/countries is also conceivable.

With these events, you can serve a great source of motivation for alumni – namely to get to know each other and to build a network with people who are not only connected to your institution as alumni, but also because of their interest in knowledge and technology transfer. Use the opportunities to let the community grow and strengthen, so that a close interlocking and mutual support (of the alumni with each other as well as with their alma mater) is created.

The ideas presented vary in the type of effort required. In particular, holding virtual meetings has great potential with low resource costs. Decide on the tools that suit your institution!

If you think of or encounter further ideas for new formats and activities during the implementation of tools, you can record them here and implement them at a later date.



What other formats  
could be used?

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## CLOSING WORDS

First of all, we would like to thank you very much for your interest in the topic and in our workbook "Alumni in Knowledge and Technology Transfer". We hope that our work and the resulting workbook have awakened your interest in **exchange and cooperation between the alumni and transfer worlds**.

If we have managed to give you a good overview, and if our experiences and examples have inspired you to rethink or further develop your previous work, we will be very pleased. Maybe the workbook will even serve as a starting point for new activities in your institution!

Whether you have read the workbook from cover to cover or just flicked through, we hope that we have introduced you to tools and content that are new to you and that we have been able to demonstrate **how much potential is still lying dormant that needs to be awakened**.

The workbook may arouse curiosity – but the motivation and joy that everyone experiences for themselves when trying things out, and which then lead to profitable and sustainable results, lie in the practical implementation. Of course, there will always be hurdles, especially at the beginning. Do not let this discourage you, keep on pursuing your ideas and goals. From our point of view, it was worth it.

Of course, we have not been able to reproduce all our experiences in this workbook. You are welcome to look for further inspiration and stimulation yourself on the Internet on the alumni pages of the HZDR and on the pages on the KIT Industry Experts Network.

As our commitment and activities are constantly in flux, we are of course also happy to be inspired further. We would be very pleased if you would share your experiences with us and inform us of further ideas and suggestions on how transfer work can be enriched by alumni.



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And, last but not least, we would like to thank our alumni and researchers! Without their curiosity, motivation and commitment, we could have done good work, but the results would have been very different!

**We are already looking forward to the coming years and also to the continued cooperation!**



*Laura Bosch*

Laura Bosch (KIT)



*Melanie Giebel*

Melanie Giebel (HZDR)

## Download



You can download the workbook as a PDF here (also for digital completion):  
[www.irm.kit.edu/downloads/alumni\\_in\\_KTT.pdf](http://www.irm.kit.edu/downloads/alumni_in_KTT.pdf)

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## INTEGRATION OF ALUMNI IN KNOWLEDGE AND TECHNOLOGY TRANSFER?

Check!



Time to get better together!

