

Evaluations: Fundamentals of Intellectual Asset Management
San Francisco, California
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103: The Deal

James Robarts & Maggy Bailly

Comments:

- Great day. Learned a lot.
- James talks too much and interrupts Maggy too often. I really enjoyed the negotiation.
- Jim had a lot of energy, which kept things lively.
- A bit of discussion on the finance topics would have been helpful for those without finance/bz background. The small group exercises were helpful. It would have been better to go over the info the other groups had when negotiating to help see where they were coming from and how different deals were made.
- Good energy. Well presented. Good personal experience shared.
- Excellent on all levels.
- Appreciate James' enthusiasm. Might have been helpful to have a CPA teach valuation.
- Needed more time for the exercise. Much detail to bele [sic]
- Very clear explanation/valuation. Need to allow more time for case study negotiation.
- Good presentations; good examples used to explain concepts. I enjoyed negotiating the deal.
- James was best instructor overall (101-104)
- Too little time evaluating exercise; it would be better to get an example how to approach the metrics being discussed
- James Robarts was excellent!
- Very interesting section; nice presentation
- Mr. Robarts was very effective in slowing his pace down in addressing the class.
- Interesting and valuable group exercise
- James was fantastic, both as a speaker and in terms of body of knowledge.
- Case studies were extremely useful in applying concepts and fostering interaction
- IT was a bit difficult to make deals being UpStart w/out more negotiation leverage, and if DiscoverGene/NGulf situation was too complex and didn't have time to negotiate effectively w/UpStart team.
- They did a fantastic job.
- The instructors were very enthusiastic about this material and did well at keeping us involved.
- Excellent job of supplementing vuefoils with real-world examples – need more time allocated to deal-making, also, seat aside time earlier in course to review your companies' information. Other than this, the deal-making exercise was the most important session during the entire course.

- Excellent presentation. Great instructors. Case study should have allowed for more people to negotiate (instead of one or two from each group). I wish we had more time to talk about income approach to valuation.
- Excellent! Instructors were very experienced & fun to listen to. They kept energy levels very high.
- Good speakers; weaker than expected close to end of session
- It would be useful (to understanding the negotiation exercise) to get copies of the other sides' information after the negotiation is over.
- Very good instruction.
- These were the two best instructors so far. They're knowledgeable, funny, and use specific, concrete examples and anecdotes.
- Excellent instructors! I really enjoyed their use of real-life examples. I hope I can take future courses with them.
- There is nothing better than practical experience to learn the tools of our exercise – EXCELLENT!! thank you!
- The workshop was excellent
- Very good!
- I enjoyed the instructors and the exercise. I thought the instructors were well suited for the topic – great rapport. In the debrief, would have been nice to get information that each group had access to – or share with everyone to see how deals were structured.
- Instructors were very helpful, used good examples, and easy to understand.
- The course baseline was too high and too fast and I missed basic principles.
- Negotiating the deal was a great exercise.
- Very good speakers; please repeat them.
- I lacked experience in this area of business, so I learned a lot. I learned a tremendous amount going through the exercise with my seasoned group members.
- I did enjoy our presenters; this section of the program was presented with energy and depth.
- The deal exercise could use more set up about what is assumed and what needs to be explored. It also would be helpful if specific items (reps, warranties, etc.) were expressly eliminated from discussion in the set up.
- Very good speakers.
- James: the problem isn't your speedy taking, but the organization of thought ☺; otherwise, you are brilliant.
- Course covered a lot of material, may have been too much & distracted from the negotiation exercise.
- By far the strongest course in the program. Excellent instructors, excellent knowledge, good exercises. Could find a way to get everyone involved better.
- I would have liked to use a real company example and compared the class results to the real negotiated deal.
- Should have explained every company's strategy after the exercise on negotiation
- Lack of references for additional readings
- This course made me stretch. Many terms & concepts are new to me. I would have been disappointed if this had been easy.

- The negotiation slides were just bullet points & the commentary was meandering. The negotiation exercise was GREAT!!!
- Valuation is important to me.
- Great instructors with lots of insights and anecdotes.
- Upbeat, entertaining, many examples.
- Could have used a little more time to go through valuation exercises.
- Truly began to learn with Jim and Maggy & their seminar topic/material. However, more real-life deals could be used! Best instructors to date!
- Suggest you provide materials as handouts that provide guidance for what “good” or “successful” outcomes might have resulted from the case study materials. You might provide specifics of several different deals that might have resulted. Provide some discussion (written) about NGulf’s vision for growth – hence why decisions were made – deals results, no deals, etc. Provide all materials used for each company for better understanding of issues & context for decisions to be made. You might suggest broad parameters for each company inside which most or at least some potential agreements would fall. Also, please include the comparison charts for agreement outcomes as a handout for perspective. Didn’t have enough time to read it.
- Give multiple examples of good deals and explanations why you asked for feedback.
- Add disclaimer about the “creative process” and “no correct answers.”