

TECHNOLOGY ASSESSMENT FOR INVESTMENT PROFESSIONALS

A Technoscan® Executive Seminar

Half a day



TECHNOSCAN® CENTRE

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TECHNOLOGY ASSESSMENT FOR INVESTMENT PROFESSIONALS

Need

Investment professionals evaluate new prospects all the time. They:

- Analyze finance
- Scrutinize management.

At present they face a surge of technology-based prospects. They have to deal with extraordinary techno-hype.

Professionals need a tool to clear the clutter and cut to the basics.

Solution

In 2010 *Technoscan*[®] Centre in Minneapolis, working with the CFA Society of Minnesota, launched a *Technology Assessment Template (TAT)* to augment the tools of investment professionals.

It can be used for a quick assessment or a deep due diligence investigation. It is based on a highly simplified core theory of technology

Examples of use

- Twentieth International Conference on Management of Technology, *International Association for Management of Technology (IAMOT)*. Miami, Florida, April 2011. Tutorial: "Technology Assessment for Investment Professionals".
- "Technology assessment for investment professionals" *CFA Society of Madison, Wisconsin*, October 23, 2013.
- In 2011 to 2013 various practical assessment applications. Case material covered in this seminar.

Audience

The seminar is intended for:

- Portfolio managers
- Venture capital managers
- Mergers and acquisitions managers
- Tech-investment strategists
- Engineering and technology managers working in finance

Agenda

- Technology-based booms and slumps
 - What next?
- Technology: A core theory
 - Concepts and constructs
 - Strategic Technology Analysis (STA)
- Technology Assessment Template (TAT)
 - Eight key criteria to assess technological viability
 - Quick assessment
 - Due diligence
- Case studies
 - High-tech companies
 - Resource companies
- Wrap up of seminar

Seminar Presenter

Dr Rias van Wyk is the director of Technoscan[®] Centre, Minnesota, USA, offering executive education for technology guidance. He is a former Director of the MS-MOT degree program at the University of Minnesota. At present he is a Professor Extraordinaire at Stellenbosch University, South Africa. He is included in the *Approved Speakers List* of the CFA Institute — a global association of investment professionals.

His academic qualifications include a master's degree from Harvard focusing on science, technology and public policy. He is the author of *Technology: A Unifying Code* and the editor of *Technoscan[®] Newsbriefs*. In 2009-2010 he served as the first President of the Management of Technology Accreditation Board (MOTAB), USA.

Handouts

(1) Article: Van Wyk, R.J, (2010): “Technology Assessment for Portfolio Managers”, *Technovation*, Vol. 30, Issue 4, April, pp. 223-228. (2) Van Wyk, R.J. (2014) *Technology: A Core Theory*, Technoscan® Centre. (3) Slide presentation: *Technology Assessment for Investment Professionals*.

Admission Requirements

There are no admission requirements. CFA Certification, or tertiary level education in engineering, science, or management of technology (MOT) is a recommendation.

Venue and Date

To be arranged with client companies.

Fees

To be discussed. Depends on geography and client requirements.

Contact

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