

## Guidelines

### What is CCM?

The **Commercialization Consulting and Mentoring (CCM) Program** provides funds to support the hiring of consulting or mentoring expertise to assist businesses and institutions in the final stages of commercializing a new product, technology or process. CCM is a program of LearnSphere, in collaboration with the Atlantic Canada Opportunities Agency (ACOA).

### Who can apply to CCM?

- ✓ Applicants must be one of the following:
  - Small or medium-sized business,
  - University or Community College
  - Research Institution (excluding federal labs)
- ✓ Applicants must have their Head Office registered and operating in one of the four Atlantic Provinces (New Brunswick, Prince Edward Island, Nova Scotia or Newfoundland & Labrador).
- ✓ All industry sectors are eligible except softwood lumber, retail/wholesale, real estate, government services, and services of a personal or social nature.
- ✓ Applicants must demonstrate that the proposed activity:
  - Supports the commercialization of a new and innovative product, technology or process; and/or
  - Helps develop and maintain partnerships, technology transfers, and licensing agreements.

### What kind of help is available?

CCM can reimburse up to **65% of eligible costs (before tax), to a maximum of \$16,250**. At least 35% of the total project cost must be paid by the Applicant. All sources of funds must be identified.

The total cost of the project must be at least \$5,000 (before taxes) in eligible costs.

The Applicant must **cash flow** the project. CCM will **reimburse** the contribution amount after the project is completed, all project costs have been paid by the Applicant, and a claim has been submitted.

### What Product, Technology or Process is eligible?

An eligible product, technology, or process must be:

1. **New** – Not yet in the marketplace.
  - Applications may still be considered if reference sales have occurred as part of a testing or pilot phase, over a limited timeframe.
  - The project is **not** eligible if it is already in the marketplace and the applicant is searching for new geographic markets.
  - The project is **not** eligible if it is a new version or an upgrade of an existing offering.

## 2. Innovative & Unique

- Offers a solution that meet new requirements, unarticulated needs, or a more-effectively meets existing market needs
- Clearly differentiated from other solutions in the marketplace.
- If applicable, have rights to its patent, trademark, or intellectual property (held or pending).

## 3. Situated past Gate 4 of the Stage-Gate<sup>®1</sup> Product Innovation Process – Developed to the point where it can be tested with a user. Internal testing of a product is not an eligible activity.



### What project activities are eligible?

In general, eligible costs include professional fees to hire a consultant or mentor to assist with timely activities to support progression through stages 4 and 5. Activities must be incremental, starting no earlier than the date of application, and be completed within a 5-month timeframe. The following information is a guideline only. This list is not exclusive.

#### **Stage 4: Testing and Validation Activities**

Eligible activities at Stage 4 include:

- *User tests or field trials of the product:* to verify that the product functions under actual use conditions, and also to gauge potential customers' responses to the product—to confirm purchase intent and market acceptance.
- *Trial, limited, or pilot production:* to test, debug, and prove the production process, and to determine more precise production costs and throughputs.
- *Pretest market, test market, or trial sell:* a mini launch of the product in a limited geographic area or single sales territory. This is a test of all elements of the marketing mix, including the product itself, and gauges customer response, measures the effectiveness of the Launch plan, and determines expected market share and revenues.
- *Revised financial analysis:* to check on the continued economic viability of the project, based on new and more accurate revenue and cost data.
- *Gap Analysis:* to determine the effort required to complete Stage 4.

**The deliverable at the end of stage 4 is a fully tested product and production process, ready for commercialization.**

<sup>1</sup> Source: [http://www.stage-gate.com/resources\\_stage-gate\\_full.php](http://www.stage-gate.com/resources_stage-gate_full.php)

### **Stage 5: Full Production and Market Launch activities**

Eligible activities at Stage 5 include:

- *Market, production or operations plans:* to develop and/or implement plans for the launch of the new product, technology or process.
- *Marketing/Sales material:* As supported in a marketing/sales/launch plan, develop product specific communication tools (online or physical materials) to support the launch and sale of the new product, technology or process.
- *Other supporting plans:* to analyze potential commercialization pathways (sell or license a new technology, or launch a new business), or develop a distribution/logistics plan or a quality assurance plan related to the launch of a new product, technology or process.
- *Monitoring:* to develop and/or implement a post-launch monitoring plan (that typically occurs early in the launch stage), where the project's performance on key metrics takes place, and the project team responds with necessary action.
- *Gap Analysis:* to determine the effort required to complete Stage 5.

**The deliverable at the end of Stage 5 is the launch of the new product, technology or process.**

Normally, a maximum of two projects is allowed per technology. Activities in a second project must demonstrate a progressive, incremental activity, and must not be the continuation of a previous project.

### **What are eligible costs?**

CCM is designed to help businesses and institutions hire experts to help with commercialization efforts. The following costs are eligible for reimbursement:

- Professional fees and travel costs (as per federal government guidelines) for hiring and/or bringing in the consultant.
- Costs associated with holding a focus group session (venue rental, equipment, etc.).
- Development of product-specific communication tools (websites, brochures, tech sheets, etc.) as part of a market/sales or launch plan.
- Limited administrative costs that are incremental in nature and directly related to the project, e.g. communication charges, photocopies, etc.

Conversely, costs associated with the following activities are not eligible for reimbursement:

- The Applicant traveling to a market destination.
- Costs incurred by the Applicant or expert/consultant beyond those noted above.
- Development of communication tools for the Applicant or for a specific event.
- Printing costs, ad buy, or purchase of operational software (ex. CRM), etc.

### **Selecting a Consultant**

The Applicant selects the consultant(s) they wish to hire and ensures that the consultant(s) complete satisfactory work. The consultant does not have to be a LearnSphere Associate. The applicant can choose up to two consultants.

At the time of application, LearnSphere will review the consultant's skills and experience to ensure they match those needed by the applicant and confirm that the consultant(s) are arm's length from the applicant.

### **Contracting, Claims and Reporting Requirements**

If the application and consultant are approved, a contract will be issued by LearnSphere to the Applicant. The contract can be dated, and eligible costs incurred, as of the date the application is received.

To assist with cash flow, LearnSphere can make two progress payments during the project, if the applicant provides proof of payment of the percentage of project costs incurred, and proof of work completed.

Applicants must agree to the possibility of a future audit and be willing to participate in program evaluations. Specifically, this means providing baseline information at the start of the activity, follow-up information when the project is completed, and participation in a survey up to four years later.

The Applicant must consent to participation in public announcements and other marketing activities for CCM, and to the inclusion of their project results in reports to the ACOA, the program's funder.

Applicants who do not comply with all contract requirements will not be eligible for future assistance.

### **The Application Process**

Application Forms are available online at [www.learnsphere.ca](http://www.learnsphere.ca) or by contacting LearnSphere.

Applications should be supported by a strong complement of information to assist in the evaluation (refer to the Application Check List). Additional information may be requested at any point in the evaluation process. Each application will be evaluated using a pre-determined grid, which measures the overall strength of the application, the technical and financial viability of the project, and the degree to which it responds to CCM's overall goals and criteria.

Applicants will be notified of the evaluation outcome as soon as possible, usually within four to five weeks of receipt of the application form and all supporting materials (including consultant(s) proposal).

The program *Accountability and Management Framework* and *Redress Provision* can be found [online](#).

### **Contact**

If you have any questions about the program, please contact LearnSphere:

Email: [commercialization@learnsphere.ca](mailto:commercialization@learnsphere.ca) Website: [www.learnsphere.ca](http://www.learnsphere.ca)

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