

Campaign Checklist

Prepare

- ☐ **Define Campaign Objectives:** Identify goals, target audience, and establish KPI's
- ☐ **Identify Companies and Contacts:** Utilize FirstIgnite to identify relevant companies/contacts for outreach
- ☐ **Notes:** Create document including any relevant info (key terms, companies to contact, companies to avoid)
- ☐ **Content Creation:** Blog post, email content, social media posts
- ☐ **Prepare Outreach Materials:**
 - **Email:** Create email sequence, each sequence is two emails long. Ensure the university or research institution name is in the subject line of your emails; include follow-up emails to re-engage recipients; and include blog in follow-up. You can use FirstIgnite's email template feature to do this.
 - Listing page: Listing page is a summarization of your research partnership opportunity. Create this page to share as a link in your email outreach (when applicable)
 - **LinkedIn:** Create LinkedIn message

Execute

- ☐ **Outreach:**
 - **Email:** Schedule or send emails
 - **LinkedIn:** Send LinkedIn connection requests to relevant contacts
- ☐ **Social Media Engagement:** Choose relevant platforms (LinkedIn is optimal), post diverse content with hashtags and mentions, and incorporate blog post links in comments while designing and posting graphics or videos for visual engagement.
- ☐ **Schedule:** Schedule 30 minute introductory calls with every company that responds with interest. These should be used as a time to learn about their interests and discuss potential overlap. Schedule a more in depth follow up call with the companies where interest is heavy aligned.

Review

- ☐ **Analytics:** Track metrics like blog views, email responses, and social media interactions.
- ☐ **Report:** Create campaign report to summarize campaign performance and identify improvements for future campaigns.



Intro Call Checklist

Preparation

- **Research the Company:**
 - Understand their industry, products, services, and market position.
 - Review recent news or developments about the company.
 - Identify potential areas of overlap with university research and technology.
- **Prepare Your Pitch:**
 - Highlight relevant research, technologies, and faculty expertise.
 - Prepare presentation slides if needed
- **Schedule the Call:**
 - Send a calendar invite for a 30-minute introductory call.
 - Confirm the date and time with all participants.
 - Include a brief agenda in the invite.

During the Call

- **Introductions:**
 - Introduce yourself and your role.
 - Ask the company representatives to introduce themselves and their roles.
- **Overview:**
 - Provide a brief overview of the research/invention/initiative.
 - Utilize any relevant information like slides, images, etc.
- **Discuss Potential Collaboration**
 - Identify specific areas where the research and the company's needs intersect.
 - Explore the type of collaboration you are interested in (licensing, commercialization, sponsored research, etc.).
- **Next Steps:**
 - Propose scheduling a more in-depth follow-up call if there is strong alignment.
 - Agree on a date and time for the next meeting.
 - Outline any information or materials to be shared before the next call.

After the Call

- **Follow-Up Email:**
 - Send a thank-you email within 24 hours.
 - Recap the main discussion points and agreed-upon next steps.
 - Attach any requested information or additional materials.
- **Internal Discussion:**
 - Discuss the call with your team.
 - Decide on the follow-up strategy and assign responsibilities.
- **Prepare for the Follow-Up Call:**
 - Gather detailed information and materials relevant to the areas of interest discussed.
 - Prepare a more detailed agenda for the follow-up call.
 - Schedule and confirm the follow-up call with the company.

