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.

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University + Company First 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.

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