



WASHINGTON STATE  
UNIVERSITY

# WORKING WITH INDUSTRY 101: A PROGRAM OVERVIEW

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Innovation and Research Engagement Office

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**AUDIENCE**

**INTRODUCTIONS:**

**ACADEMIA?**

**INDUSTRY?**

**RESEARCHER?**

**ADMIN/SUPPORT?**



**AUDIENCE  
COMMENTARY:  
WHO HAS PROGRAMS OR  
OFFICES/UNITS TO SUPPORT  
ENGAGEMENT?**

# OUR GOAL IS TO HELP YOU GROW YOUR INDUSTRY RESEARCH PORTFOLIO

- Network
- Align research to contract
- Timelines and budget help
- Contracting support
- Assist in follow-up



Innovation &  
Research  
Engagement  
Office



# PURPOSE, PHILOSOPHY & GOALS FOR INDUSTRY 101 SERIES

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- Illustrate cultural gaps existing between academia and industry
- Address divergent processes for federal vs. industry research opportunities (engagement, projects, funding, publishing, IP, etc.)
- Describe Proactive vs. Reactive partnering (ind vs. fed)
  - Industry partnering is heavily relational, versus primarily transactional. Both parties should benefit!
- Provide a high-level overview of the multiple facets of engagement with the private sector, starting from the ground up, all the way through execution and scoping future projects, to enable faculty to *create their own successes*.
  - What factors should they consider?
  - What are the important questions?
  - Provide training to prevent repetitive problems!





**EXAMPLES OF LECTURE  
CONTENT**  
*SESSION 1*

# OVERVIEW OF SESSIONS

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## **Class 1** – *Introduction to Working with Industry: Process, Proposal, Timelines & Statements of Work*

- IREO Staff will provide an overview of the course & outline the process for developing of a partnership
- Overview of initial contact to getting the project scoped, submitted & over to legal
- Describing differences for industry vs. federal contracting & meeting expectations of industry partners
- Tools & tips for being a good partner, billing, adding ancillary value & getting to the next project
- How to identify common pitfalls & develop success strategies during the process



# OVERVIEW OF THE ENGAGEMENT PROCESS WITH CORPORATE SPONSORS

1 Pre-proposal stage      2 Proposal submission      3 Contract      4 Funded Project



	1 Pre-proposal stage	2 Proposal submission	3 Contract	4 Funded Project		
What is it about?	<ul style="list-style-type: none"> <li>Building trust</li> </ul>	<ul style="list-style-type: none"> <li>Understand the issue</li> <li>Exchanging ideas</li> </ul>	<ul style="list-style-type: none"> <li>Thinking about solution</li> <li>Creating proposal documents</li> </ul>	<ul style="list-style-type: none"> <li>Formalizing the relationship</li> <li>Creating legal documents</li> </ul>	<ul style="list-style-type: none"> <li>Conducting experiments</li> <li>Deriving insights</li> </ul>	<ul style="list-style-type: none"> <li>Extending engagement</li> <li>Building on existing successes</li> </ul>
Typical pitfalls and risks	<ul style="list-style-type: none"> <li>Too fast</li> <li>Too bold</li> <li>Too transactional</li> </ul>	<ul style="list-style-type: none"> <li>Opinionated</li> <li>Self-serving</li> <li>Impatient</li> </ul>	<ul style="list-style-type: none"> <li>Unclear value add</li> <li>Missing the point</li> </ul>	<ul style="list-style-type: none"> <li>Unclear priorities</li> <li>No BATNA</li> <li>Lack of communication</li> </ul>	<ul style="list-style-type: none"> <li>Irregular updates</li> <li>Budgets overruns</li> <li>Scope creep</li> </ul>	<ul style="list-style-type: none"> <li>Extension opportunity ignored</li> <li>Realization too late</li> </ul>
How to collaborate	<ul style="list-style-type: none"> <li>Be authentic</li> <li>Think about adding value</li> </ul>	<ul style="list-style-type: none"> <li>Active listening</li> <li>Understand business fundamentals</li> </ul>	<ul style="list-style-type: none"> <li>Understand audience</li> <li>Differentiate between "needs" and "wants"</li> </ul>	<ul style="list-style-type: none"> <li>Strategize &amp; align</li> <li>Don't give up ownership of the process</li> </ul>	<ul style="list-style-type: none"> <li>Use PMO services from BD&amp;P to support complex programs</li> </ul>	<ul style="list-style-type: none"> <li>Create a plan T-3 months</li> <li>Continue advancing the relationship</li> </ul>







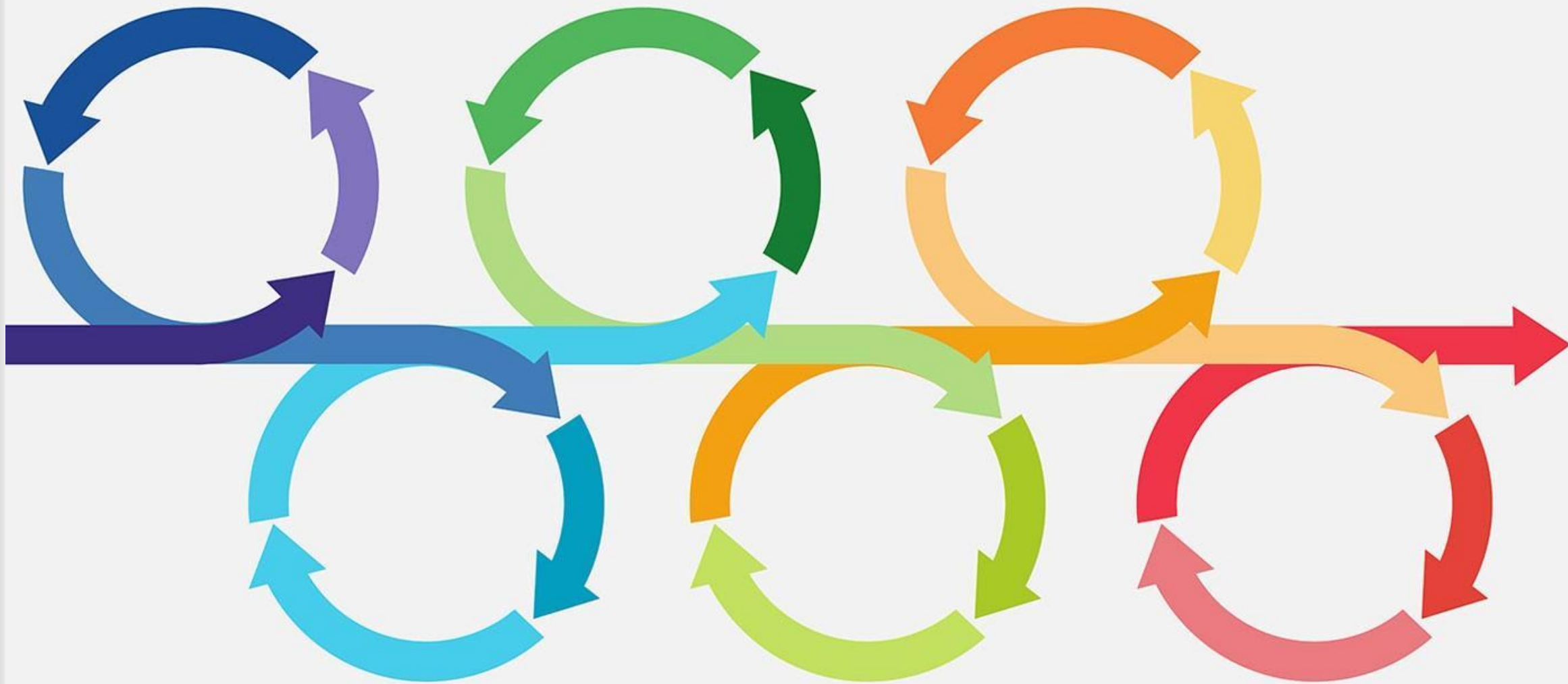
# KEYS TO SUCCESS: *The Relationship is Paramount*

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- It's largely relational
  - Find the right organization
  - Find the right person
  - Build the bridge
- Focus on finding mutual value
  - Learn their processes and constraints
  - Position your work within their process
  - Budget within their constraint



# ADAPT & ITERATE



# GETTING TO THE PROJECT: *Points for Consideration*

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## What is the premise of the interaction?

- Project types
- Is there room and interest to for the project to move from one type to another?

## What are you trying to achieve?

- Are you selling technology or sharing expertise?
- What is the value to you?

## What are the partner's interests and constraints?

- What does a typical project look like for them
  - Size/scale/scope/timing
- What outcomes are of greatest value to them?

**Define critical outcomes and break projects down into sequential steps**





# INTELLECTUAL PROPERTY

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- Legal tools that block others from using the things you create
- Like any other form of property rights, the things you create can be sold, traded, leased under whatever terms both parties are agreeable to
- When companies fund work at universities, they often want a clear path to use the work they funded...
- **BUT**, faculty, graduate students and postdocs work for the University; what they create is owned by the University
- It is in the interest of both parties to think about existing and potential intellectual property associated with a project before initiating work
  - Clarifies interests
  - Reduces risks
  - Simplifies contracting

# PROJECT & CONTRACT TYPES:

## *One size does not fit all!*

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### **Simple testing**

- Specialized facilities
- Unique capabilities
- Requirement for external validation

### **Demonstration or proof of concept**

- Often involves background intellectual property
- Can lead to new intellectual property

### **Problem solving for partner**

- Developing a better understanding of a process or product
- May or may not yield intellectual property

### **Standard Sponsored Contract:**

- Outlines contacts, project scope & duration, IP rights, termination, reporting, publication processes and notifications

### **BIPA (Broad Industry Project Agreement):**

- Enables simple interactions with industry
- Initial bridge; can grow into larger projects

### **CAP (Contract Acceleration Program):**

- Streamlines interactions by outlining up front licensing and IP terms before work starts
- Reduces risk for potential partners



# BUDGETING STRATEGIES & CONSIDERATIONS

## University Budgeting Approach

10% FTE with an annual salary of \$120,000

	Salary	\$12,000
+	Benefits (25%)	\$3,000
	Supplies	\$5,000
	F&A (50%)	\$10,000
<hr/>		
	PROJECT COST	\$30,000

### Internal to WSU:

- Route eRex and use normal forms and processes
- Consult your finance team on appropriate F&A rates

## Industry Budgeting Approach

10% FTE = 200 hours

Hourly Rate =	$\frac{\text{Salary} + \text{Benefits} + \text{F\&A}}{\text{Project Hours}}$
Hourly Rate (\$/hr)	\$112.50
Project Hours	200

	Labor	\$22,500
+	Supplies	\$7,500

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PROJECT COST      \$30,000

### External to WSU:

- Use full-cost accounting
- Make sure you consult your finance team first!





**EXAMPLES OF LECTURE  
CONTENT**  
*SESSION 2*



# OVERVIEW OF SESSIONS

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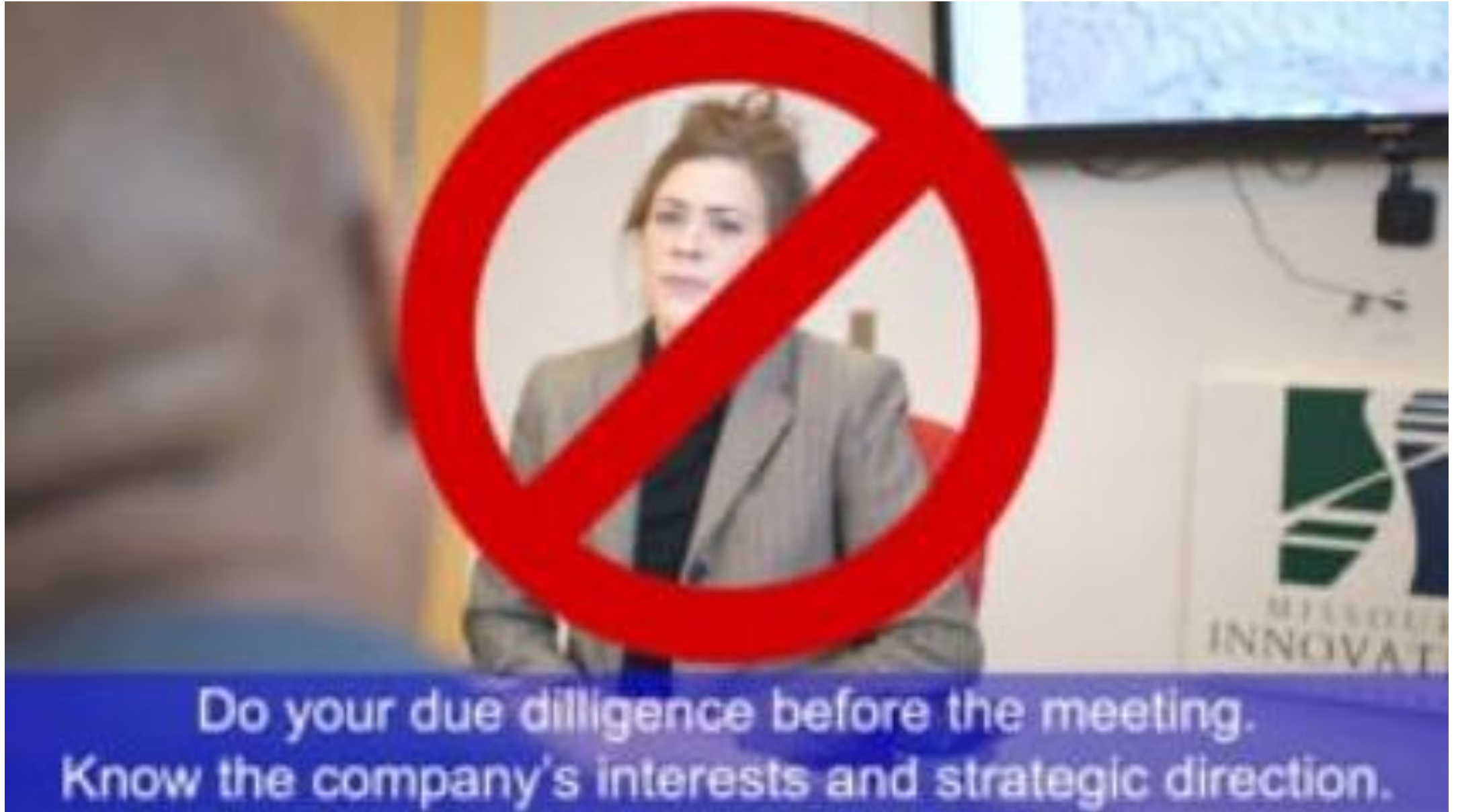
## **Class 2 – *Finding the Right Partner & Specific Contacts***

- Experts from WSU Libraries will instruct how you can find companies working & publishing in your interest areas
- IREO staff will provide an interactive demonstration of how to find individuals at companies of interest who are best initial outreach targets
  - TOOLS: Web of Science and LinkedIn
- We will walk through individual outreach strategies and examples will be tailored to applicable research areas of attendees
- Appointments will be available for personalized follow-up and coaching from our experts





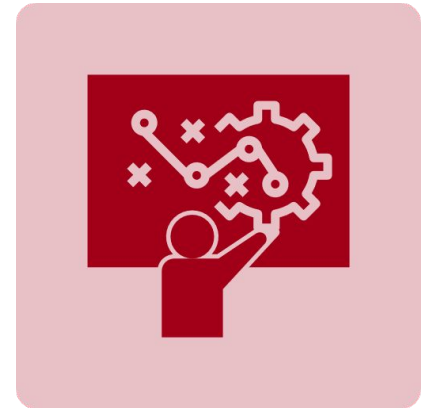
# NAILING INDUSTRY PRESENTATIONS



# COMPANY NEEDS & STRATEGIES: *Where does my research fit in?*

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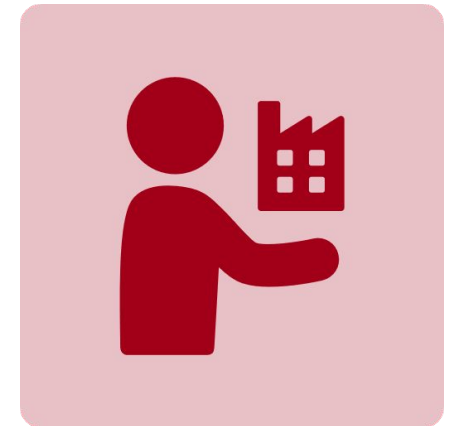
- Who would be interested in your research?
- What did you need to know before reaching out?
- Where are the mutual interests?
- What are the potential barriers?
- Articulate impact and value of your research
- Build connections... strategize... own the process



# MARKET & INDUSTRY RESEARCH: *Do the pre-outreach work.*

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- What do you know about the market?
- Who are the players? Who is aligned to your research?
- How does your research compare to related industry trends and innovations?
- Can you map your research to the industry?
- Do your potential partners work with Academic Labs?



DEMONSTRATIONS FOR CONTACT MINING



# LINKEDIN OUTREACH EXAMPLE

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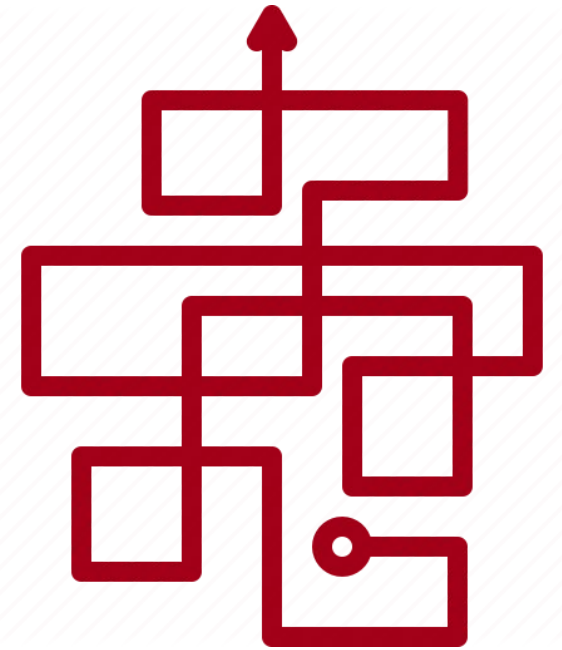
Hi [Name]. I am a [Position] in [Department] WSU and was hoping you might have a few minutes to learn about my research involving [few words on topic] and explore the potential for development of a collaborative effort with [Company]. Thanks in advance and have a great day.



# **PARTING WISDOM:** ***Make the most of LinkedIn!***

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- Interacting with LinkedIn is not a linear process
- *LinkedIn is sneaky* – they change things frequently
- Use LinkedIn in conjunction with other tools
  - Company websites
  - Industry and trade associations
  - Conferences – program agendas and executive committees
  - Market research reports – may contain sources and points of contact
  - Google (e.g. seeking contact info)





# WHEN YOU FINALLY GET THAT MEETING, MAKE IT ABOUT THE COLLABORATOR!





**EXAMPLE QUESTIONS FOR  
PANEL DISCUSSIONS**  
*SESSIONS 3 & 4*



# OVERVIEW OF SESSIONS

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## **Class 3** – *Effective Collaborations from Industry’s Perspective: Best (and worst!) Practices*

- A panel of industry representatives with deep experience of working with academic research partners will discuss how to initiate a conversation and develop a project

## **Class 4** – *Effective Collaborations from the Faculty Perspective: Benefits of Industry Partnering and Lessons Learned*

- A panel of faculty peers will discuss strategies and adaptations from their industry experiences
  - Additional discussions include how industry partnerships have enriched the lives, and careers, of Ph.D. and Postdoctoral trainees



# SAMPLE INDUSTRY PANEL QUESTIONS

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How does your organization collaborate with universities?

- How are those collaborations initiated?
- What do you like to see from faculty during early interactions?
- When early conversations advance to a point where confidential information is ready to be shared, how do you handle situations where there may be similar IP between your company and the academic researcher?

Can you tell us a little bit about how collaboration opportunities are circulated in your company? How can faculty find out more about research opportunities at your organization?

- What should people NOT do? Any negative (de-identified) examples?

How would you recommend that our faculty network with the appropriate folks in your company in the current semi-remote climate?

- Have you noticed a change in social media activity (e.g. LinkedIn) activity for you and/or your colleagues?
- How do you recommend that academics engage at conferences? E.g., poster sessions, podium presentations, visiting booths, etc.?

Can you provide examples of successful U-I collaborations with your organization?

- What makes it a success, in your opinion?

How does your organization interact with trainees that work on collaborative projects? Do you see this as a potential talent pipeline?

Is there anything you'd like to talk about that hasn't yet been discussed?



# SAMPLE FACULTY PANEL QUESTIONS

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- How did you establish your initial relationship(s) with industry?
  - Does anyone have examples of attempts to engage that didn't work?
  - How would you recommend others develop the right types of connections?
- How has industry changed your research as related to:
  - Benefits, challenges, pivots of foci, new directions or changes to existing directions, add-on federal funding as a result of your partnership, new federal funding based on a past industry collaboration
- How has working with industry benefited your group?
  - Job placement opportunities for trainees, impact on ability to publish (good/bad/other), additional exposure to new research opportunities
- How is relationship management different between academic collaborations and industry?
- Can you provide an example of a collaboration working well for you, and why?
- Is there anything you'd like to talk about that hasn't yet been discussed?





**AUDIENCE  
COMMENTARY:  
WHAT WOULD YOU ADD?  
WHAT DID WE MISS?**



# THANK YOU!

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