WORKSHOP: Leveraging Data for Better U/I Research Collaborations

UIDP Irvine

October 3rd, 2023

Wellspring

Knowledge In Sight™

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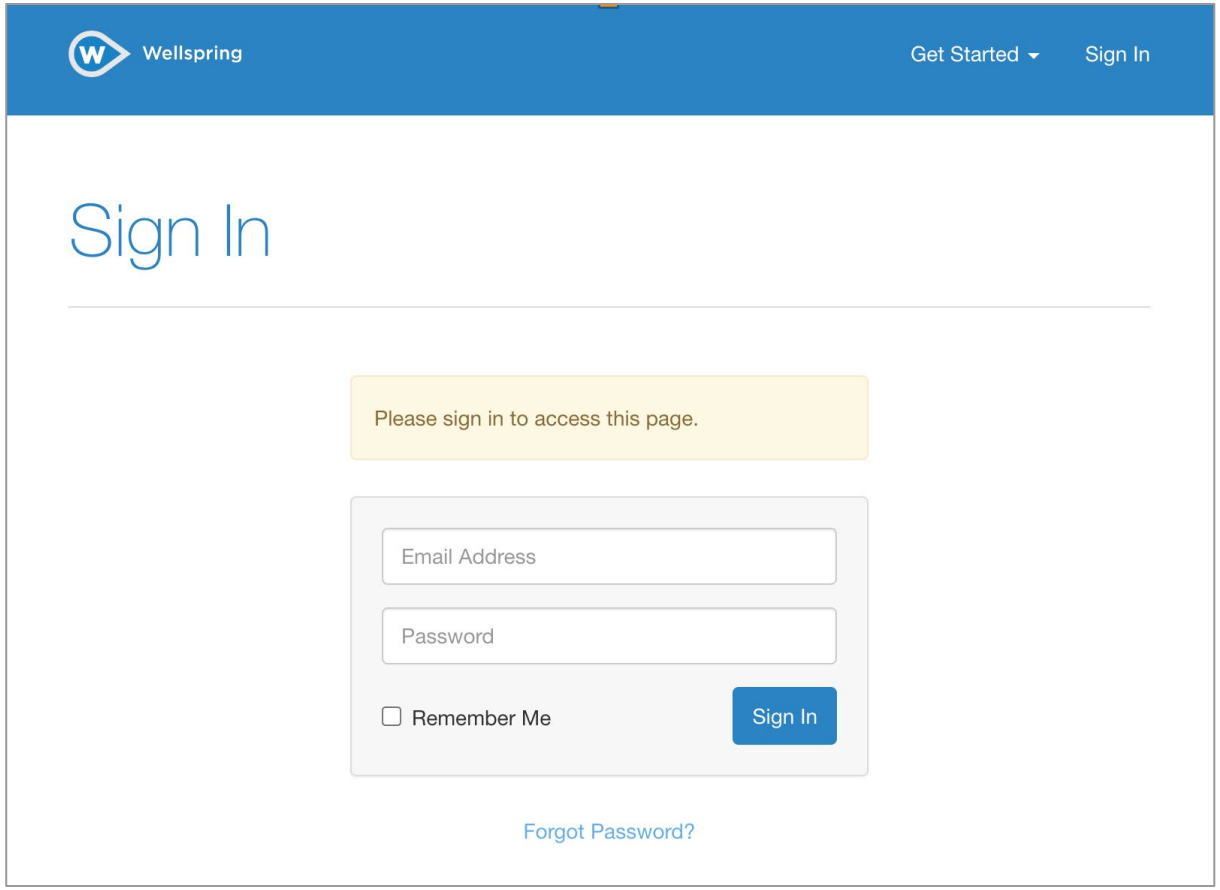
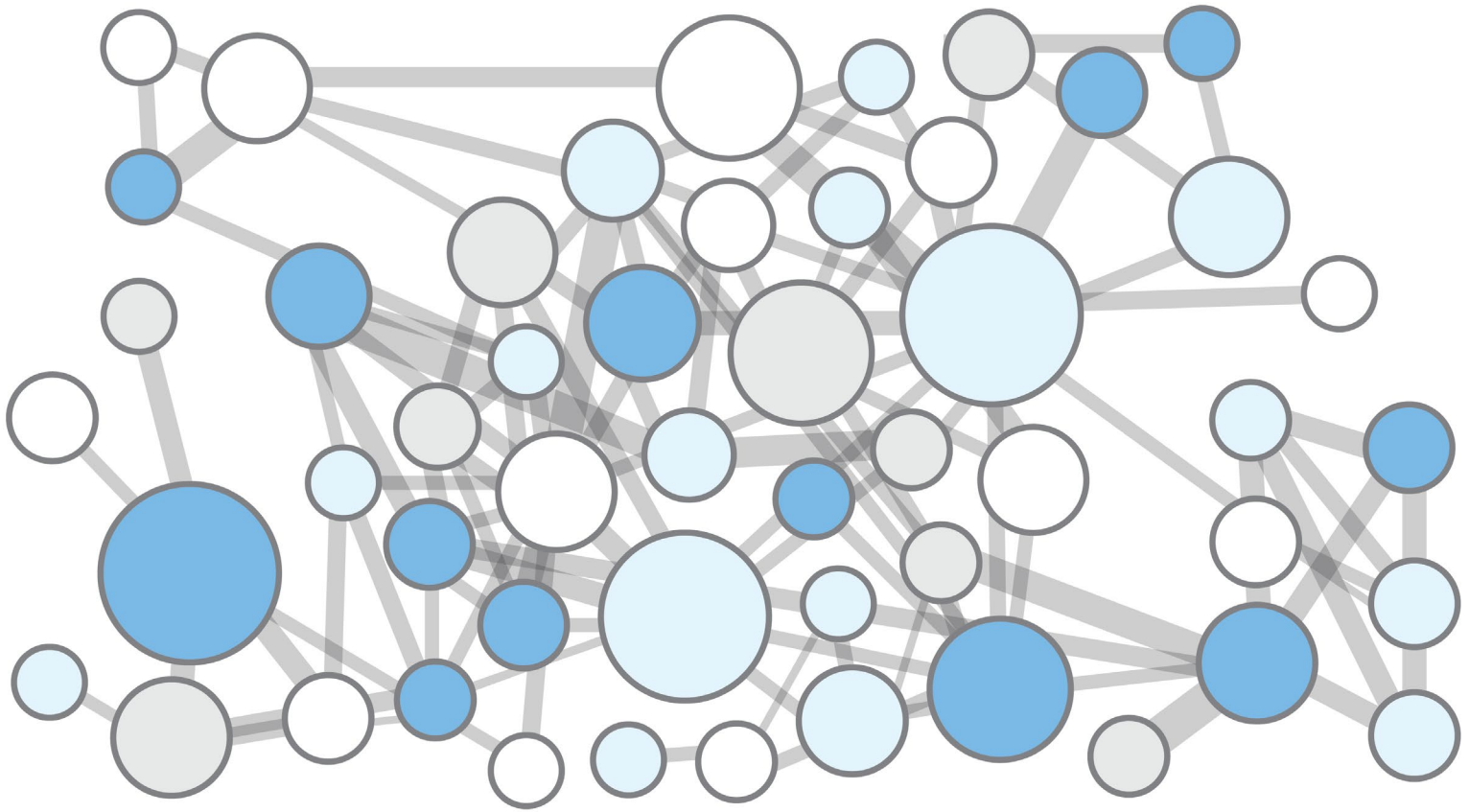
- Follow the link in the email you received.
- Try to log into the system.
- If you need help, raise your hand.



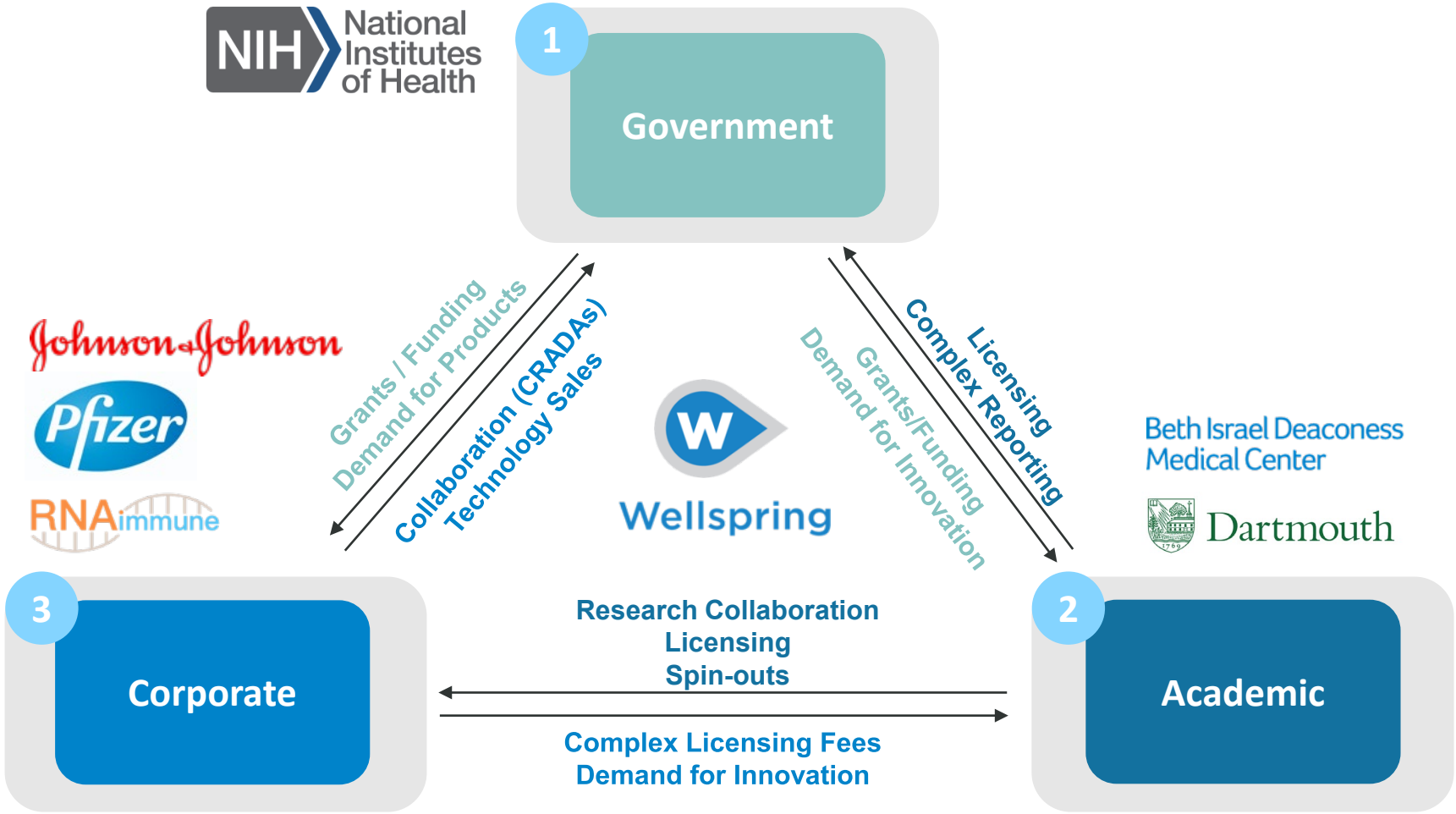
Today's agenda

- Introduction (30 min)
- Scout overview (30 min)
- Exercise 1: Discovering Companies (30 min)
- BREAK (15 min)
- Exercise 2: Discovering Researchers (30 min)
- Exercise 3: Discovering Institutions (30 min)
- Wrap-up / Q&A (15 min)

This is What Modern Innovation Looks Like



COVID-19 Vaccine Represents a Successful Innovation Supply Chain



How do you find research partners?

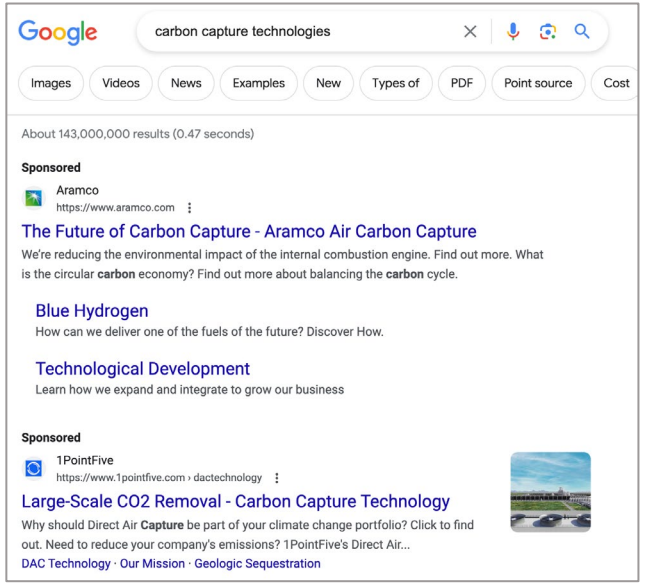
Conferences

"Our team goes to dozens of conferences every year."

Networking

"We know VCs who help us spot new opportunities."

Google



"Google isn't a great fit, but it's better than nothing."

Are we missing opportunities?

Company

"Beyond the top 3-5 institutions, we have no idea who to contact."

University

"We're not even aware of all the research happening within our own institution."

Everyone

"We know we're missing a lot of value – but lack the levers to change."

Who’s got time for comprehensive research?

Company

“We’re a small team. Mostly, we just go to conferences and work our networks.”

University

“We only have time to actively market our top 1% of PIs and/or inventions.”

Everyone

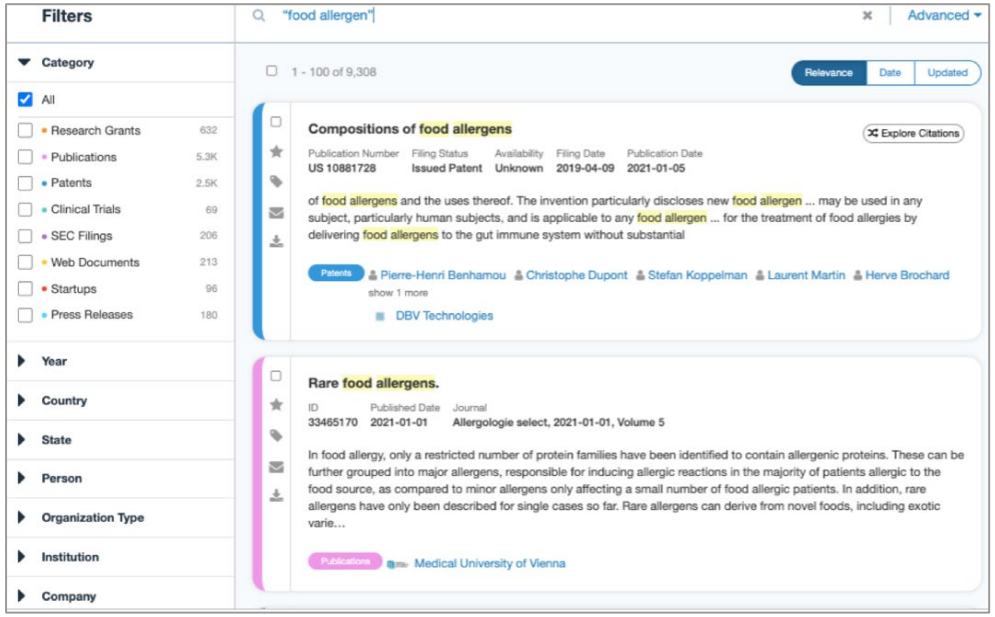
“We know we’re missing a lot of value – but lack the levers to change.”

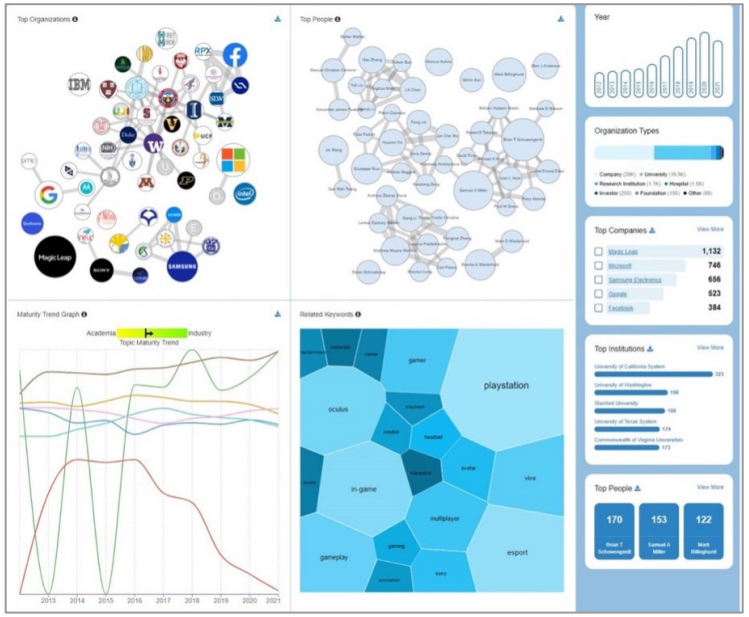
Modern data & analytics is changing the game

Large, complementary data sets

Advanced AI/ML techniques

Integrated analytics capabilities





Where can systematic data help the most?

Companies

Academic Relations

Identify the best researchers / PIs

Compare strengths across institutions

External Innovation

Find and vet research partners & startups

Perform technology landscaping

Track competitors' innovation bets

Institutions

Corporate Engagement

Find and vet corporate partners

Prioritize funding opportunities

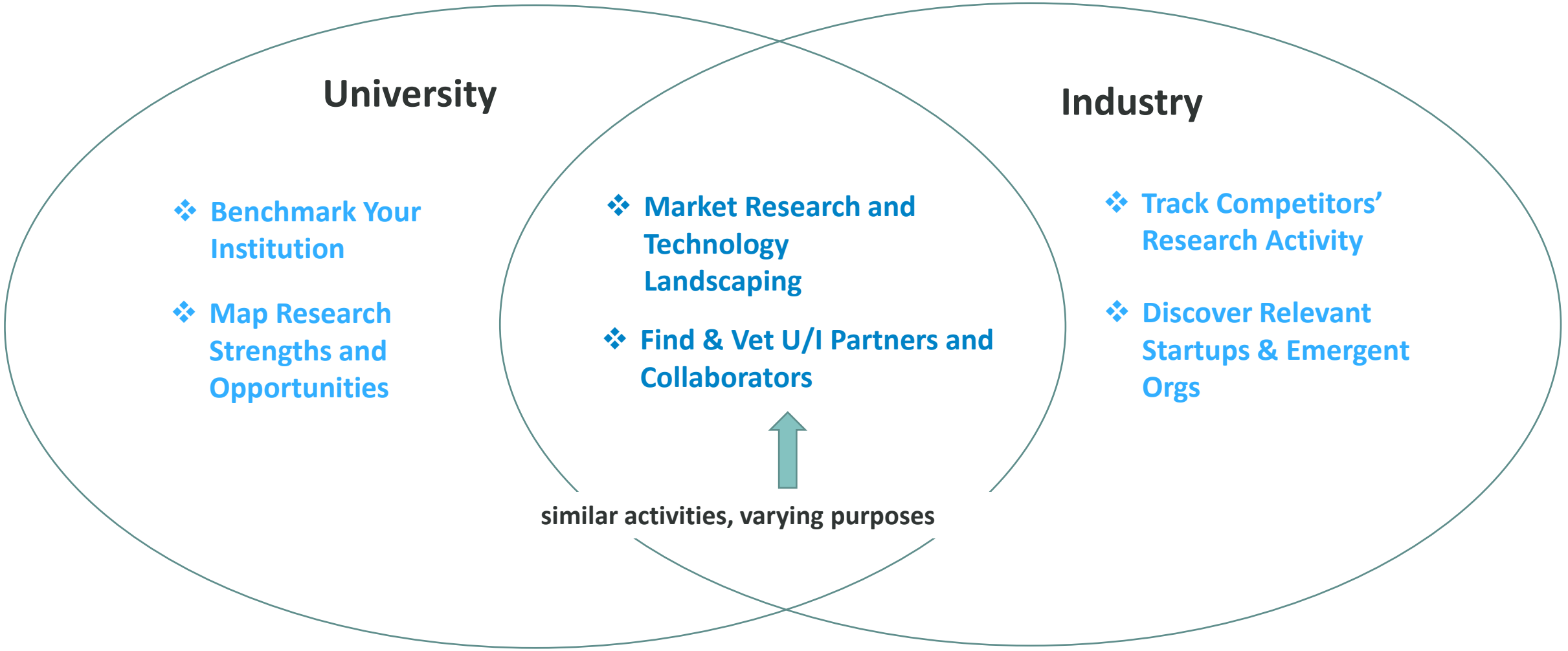
Showcase our research strengths

Technology Transfer

Find and vet potential licensees

Assess the market for an invention

Academia & Industry have overlapping objectives



The Industry perspective: Pete Ellingson (P&G)

Pete Ellingson

P&G: R&D Director / Open Innovation, 1994-present

University of Wisconsin: PhD Physical Chemistry, 1994

Sam Azeba

P&G: R&D Sr. Scientist / Open Innovation, 2022-present
Thermo Fisher Scientific: Formulation/Business Mgmt, 2012-22

University of Cincinnati: MS Pharmaceutical Science
Xavier University: MBA

The Industry perspective: Pete Ellingson (P&G)

Our Wellspring Journey:

- Year 1 Pilot – FY 22/23. 15 seat licenses
  - ✓ R&D – primarily C+D team, Upstream R&D teams, Infolytics
  - ✓ Feedback: powerful landscaping tool…
    - Interface ease of use
    - Quickly find information
    - Create centralized databases linked to sources
    - Easy to share findings w/ teammates
    - “One Stop Shop”

- Year 2 Pilot – FY 23/24. 55 seat licenses
  - ✓ R&D – broader cross section of users

The Industry perspective: Pete Ellingson (P&G)

Searches of Interest

- Patents
- SEC Filings
- Publications
- Web Documents
- Flintbox Opportunities
- News
- Research Funding
- Clinical Trials
- Top Organizations
- Institute Analytics
- Company Analytics
- Top People

The University perspective: Todd Cleland (UW)

Todd Cleland

UIDP: Senior Fellow, 2022-present

University of Washington: Corporate Relations, 2010-2021

HP: Strategic Business Development, 2003-2010

University Perspective
Value Proposition

- Allows rapid, data-driven exploration and decision making to support
  - Benchmarking
  - Identification of potential partners for new collaborations or business opportunities
- Trying to extract the same information from siloed databases would be much more difficult and time-consuming

University Perspective – Use Cases

- Office of Research, Dean's Office
  1. Benchmark your institution in specific technical areas
     - Understand strengths & weaknesses vs. peers
     - Identify gaps and targets for hiring
     - Identify opportunities for big grant applications
  2. Build research teams for new projects and funding opportunities
     - At your institution (across units)
     - At other schools (big, multi-institution grants)
- Corporate Relations
  1. Identify potential industry partners for a researcher or lab
  2. Identify faculty at your institution for industry campus visits
- Tech Transfer Office
  1. Patent Landscape Work
  2. Identify potential licensees for university IP

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Process workflow: data-driven partner searches

1. State your objective(s)
2. Define search parameters
3. Conduct and refine searches
4. Assemble a longlist of options

→ **Today's exercises**

5. Create evaluation criteria
6. Reduce options to a shortlist
7. Prioritize outreach targets
8. (repeat)

→ **Don't forget these steps!**

Example: key objective & evaluation criteria

Key Objective

Find university research partner(s) to co-develop next-gen carbon capture methods.

Desired Results

Core IP secured within the next 3 years. Technology in production within the next 5 years.

Research Coverage (40%)

How closely do the university's research strengths match your needs? Which labs / PIs are worth considering? How long have they been active?

Industry Experience (35%)

Does the university have a track record of successful corporate partnerships? What about the specific labs / PIs you are considering?

Bench Depth (15%)

Does the university have one superstar faculty member, or multiple labs attacking related aspects of the domain?

Strategic Fit (10%)

How well does the university align with your overall mission and goals? How much does regional proximity matter?

Report-out (at workshop's conclusion): what did you find?

Pick one (or more) of today's three exercises and tell us how it went.

Today's exercise

- What were your Key Objectives and Desired Results?
- Which search tactic(s) worked best in generating a longlist?

Next steps

- What would be your evaluation criteria?
- What were the top three options you identified?

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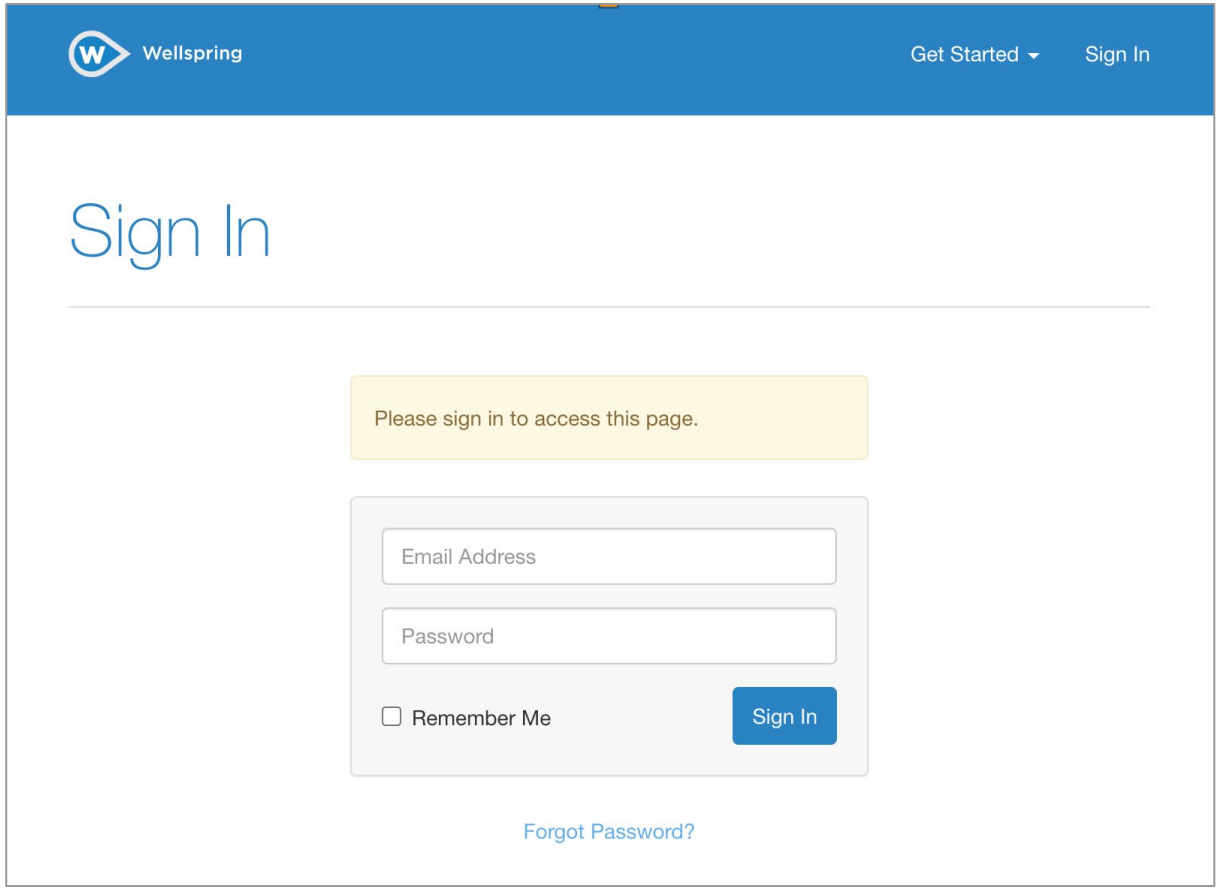

Exercise 1: Discovering Companies

Process workflow: Discovering Companies

1. State your objective(s)
2. Define search parameters
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Carbon Capture

Key Objective

Find corporate research partner(s) to sponsor next-gen carbon capture research program.

Desired Results

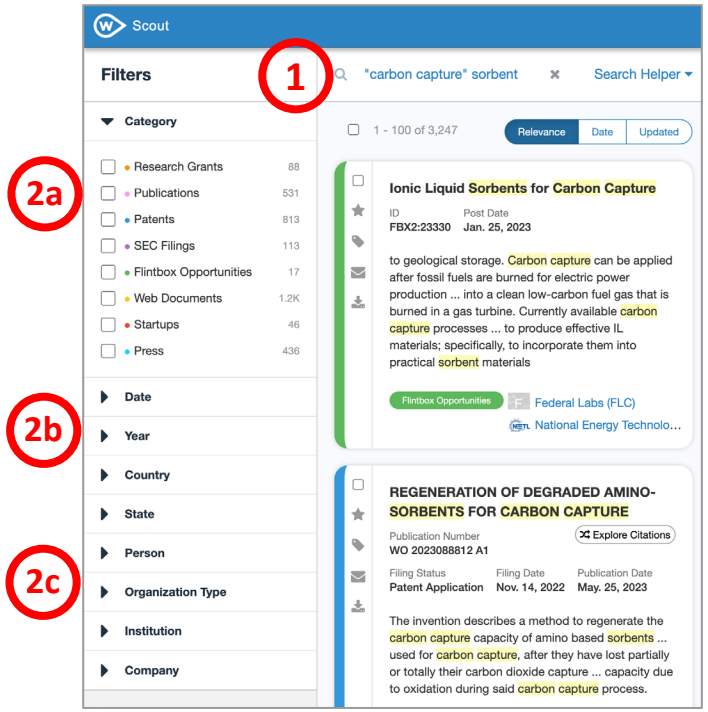
Sponsorship(s) secured this year. Publications and/or patents within the next 3 years.

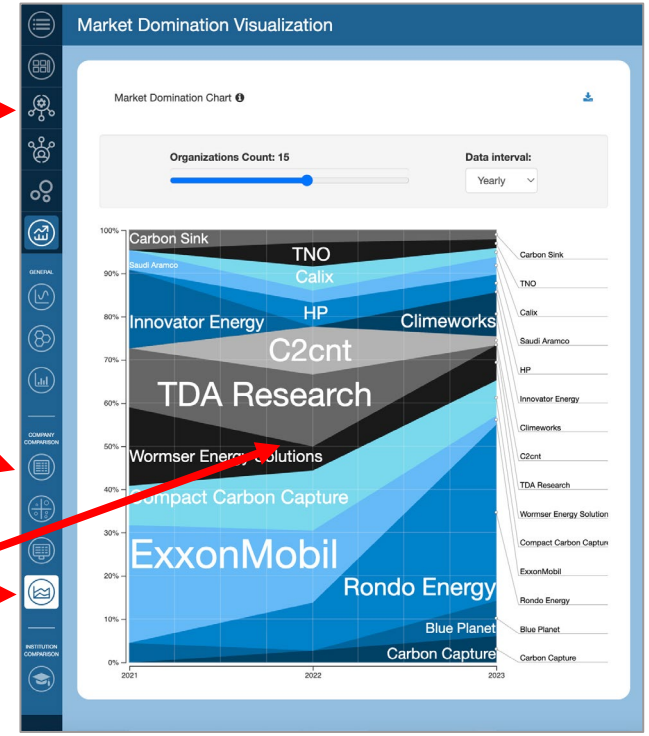
Search Parameters

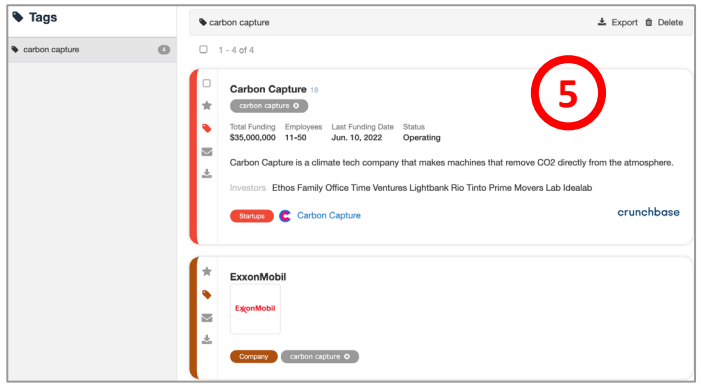
- Keywords = “carbon capture” sorbent
- Category = Publications, Patents; Grants
- Org Type = Corporation
- Year = 2021, 2022, 2023

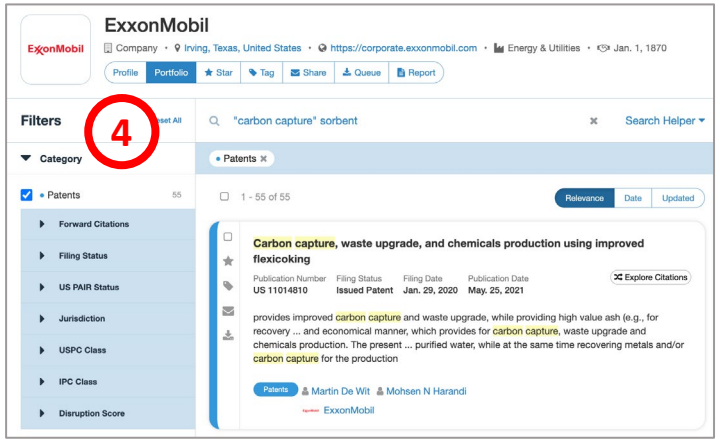
Step-by-step: Discovering Companies

1. Search: “carbon capture” sorbent
2. Set filters:
   a. Category = Publications, Patents
   b. Year = 2021, 2022, 2023
   c. Org Type = Company
3. **Scan for promising options**
   a. Market Domination
   b. Industry Networks
   c. Emergent Organization Ranking
4. **Scan company profiles**
5. Tag to longlist



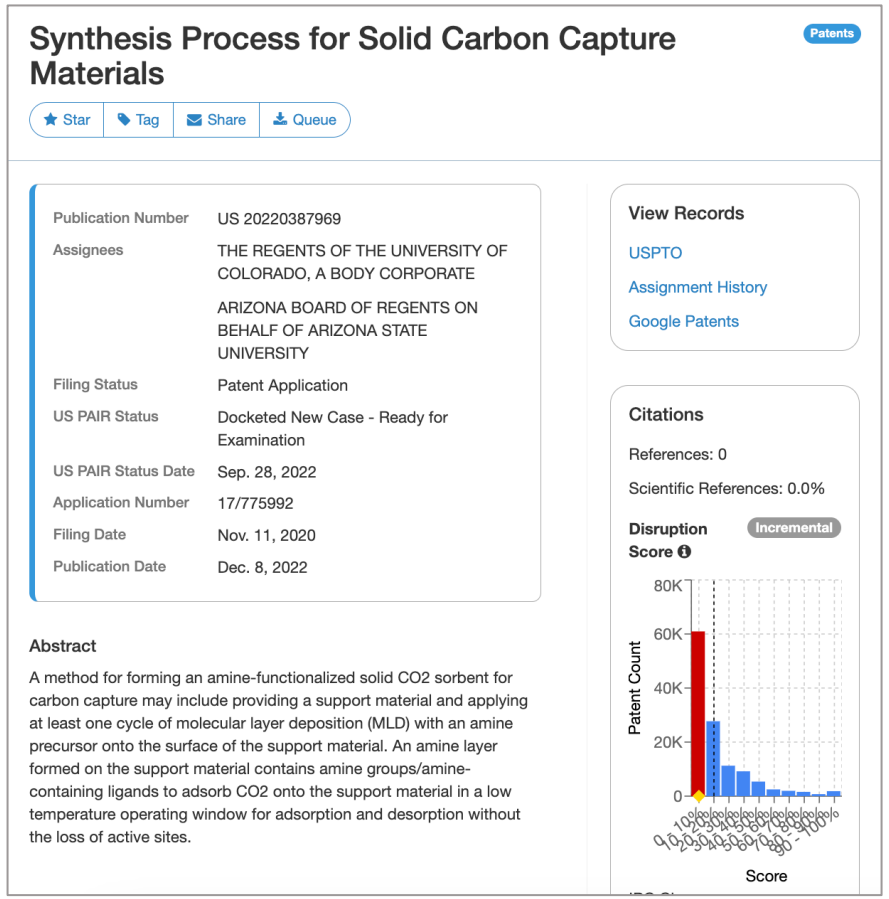


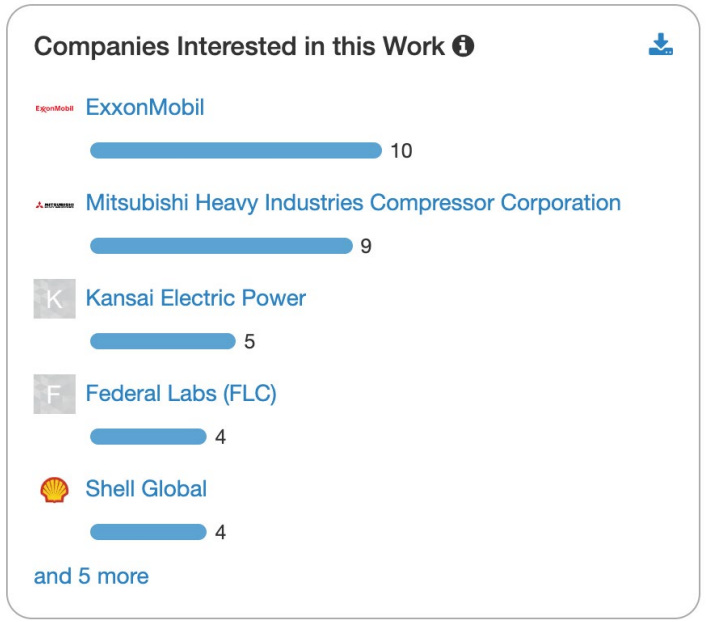




Extra credit: browse by organizational fit / interest

1. View a patent or publication of interest
2. Scroll down to bottom right
3. Browse the sidebar item “Companies Interested in this Work"





Exercise 2: Discovering Researchers

Process workflow: Discovering Researchers

1. State your objective(s)
2. Define search parameters
3. Conduct and refine searches
4. Assemble a longlist of options
5. Create evaluation criteria
6. Reduce options to a shortlist
7. Prioritize outreach targets
8. (repeat)

Glucose Monitoring

Key Objective

Find PIs / labs to work with for technologies related to glucose monitoring devices.

Desired Results

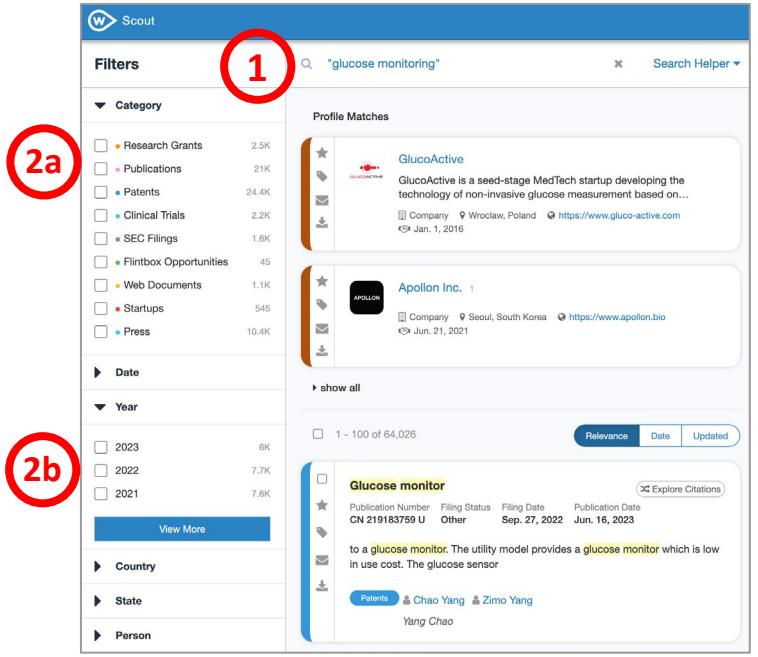
Sponsorship(s) secured this year. Publications and/or patents within the next 3 years.

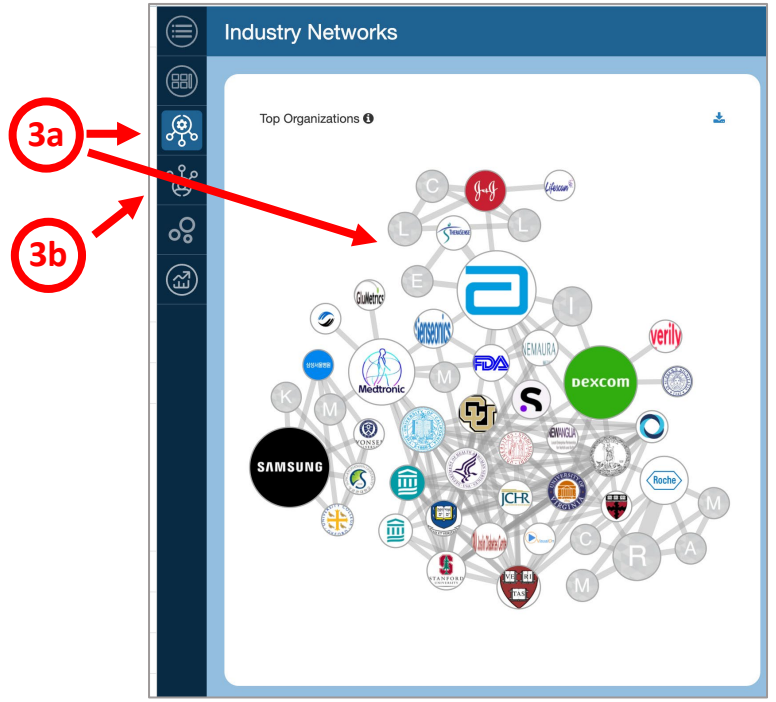
Search Parameters

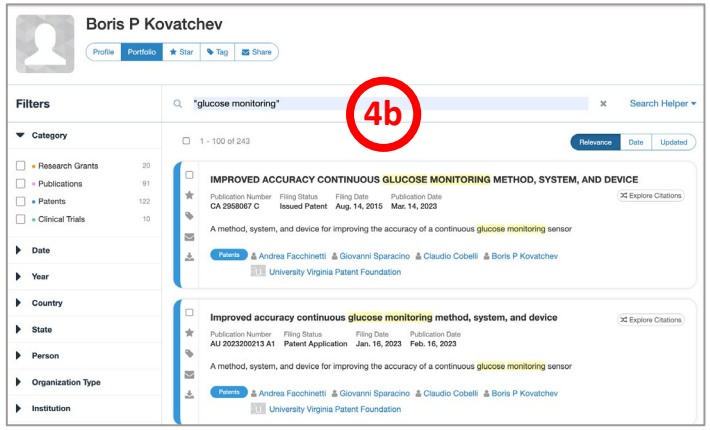
- Keywords = “glucose monitoring”
- Category = Grants, Publications, Patents
- Org Type = Corporation
- Year = 2021, 2022, 2023

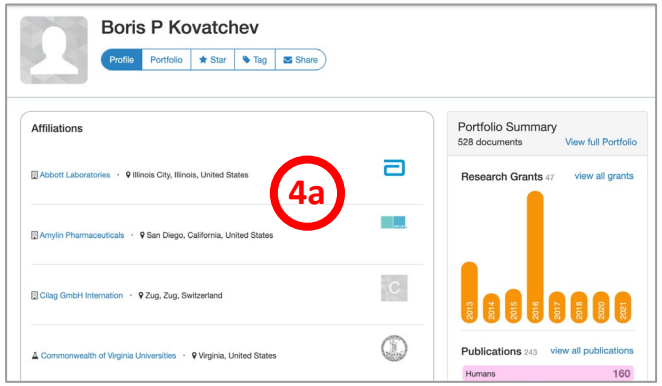
Step-by-step: Discovering Researchers

1. Search: “glucose monitoring”
2. Set filters:
   a. Category = Grants, Publications, Patents
   b. Year = 2021, 2022, 2023
3. **Scan for promising options**
   a. Industry Networks -> Specific Institution(s) -> Top People
   b. Researcher Networks
4. **Scan researcher profiles**
   a. Corporate affiliations
   b. Research history
5. Tag to longlist









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Exercise 3: Discovering Institutions

Process workflow: Discovering Institutions

1. State your objective(s)
2. Define search parameters
3. Conduct and refine searches
4. Assemble a longlist of options
5. Create evaluation criteria
6. Reduce options to a shortlist
7. Prioritize outreach targets
8. (repeat)

Renewable Energy

Key Objective

Win a multi-party NSF ERC grant for long-term research into renewable energy.

Desired Results

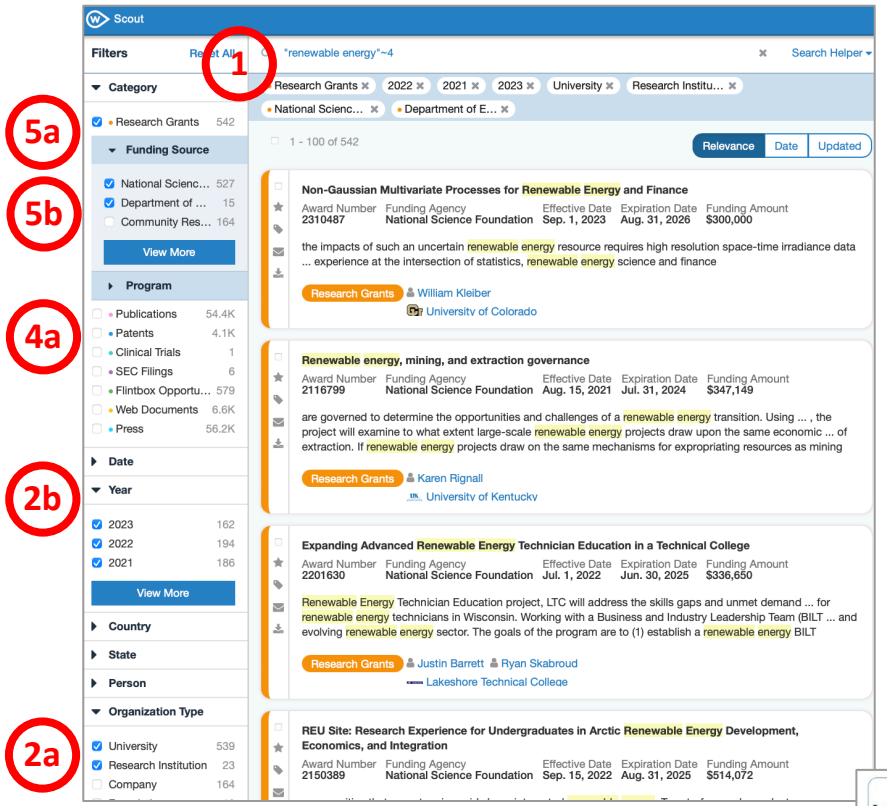
Win grant award this year. Launch funded research center next year.

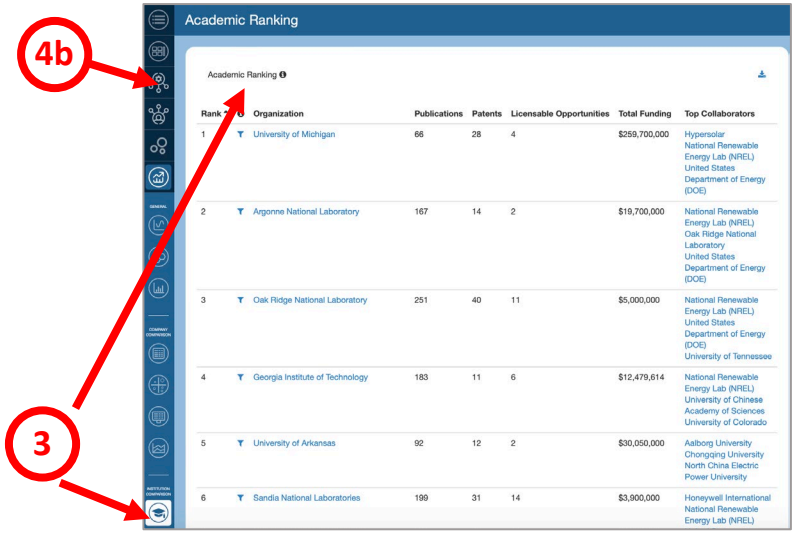
Search Parameters

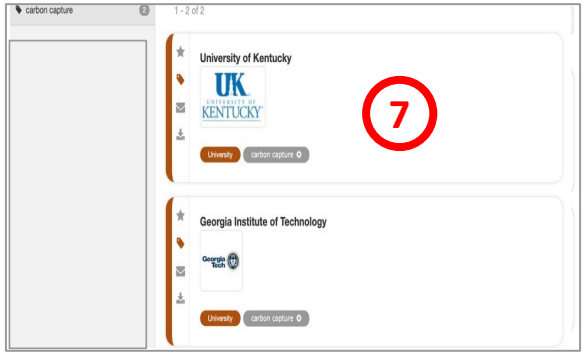
- Keywords = “Renewable Energy”
- Category = Grants; Publications, Patents
- Org Type = University, Research Institution
- Year = 2021, 2022, 2023

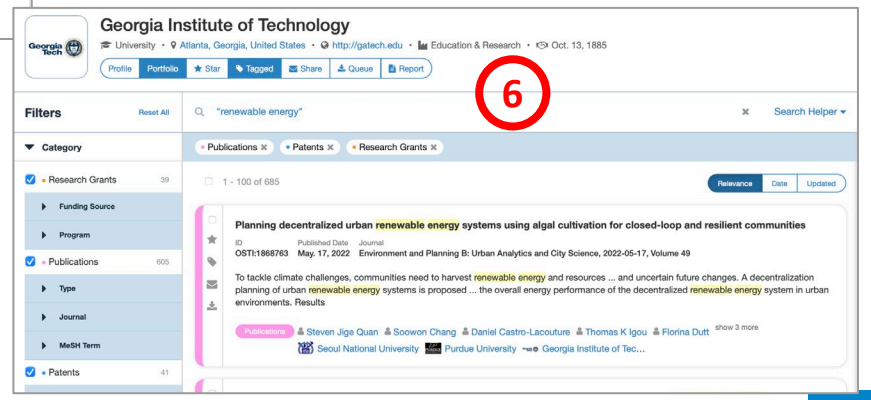
Step-by-step: Discovering Institutions

1. Search: “Renewable Energy”
2. Set filters:
   a. Org Type = University, Research Institution
   b. Year = 2021, 2022, 2023
3. **Academic Ranking**
4. **Scan for industry collaboration experience**
   a. Category = Publications, Patents
   b. Industry Networks
5. **Scan for NSF grant experience**
   a. Category = Grants
   b. Granting agency = DOE, NSF
6. **Scan institution profiles**
7. Tag to longlist



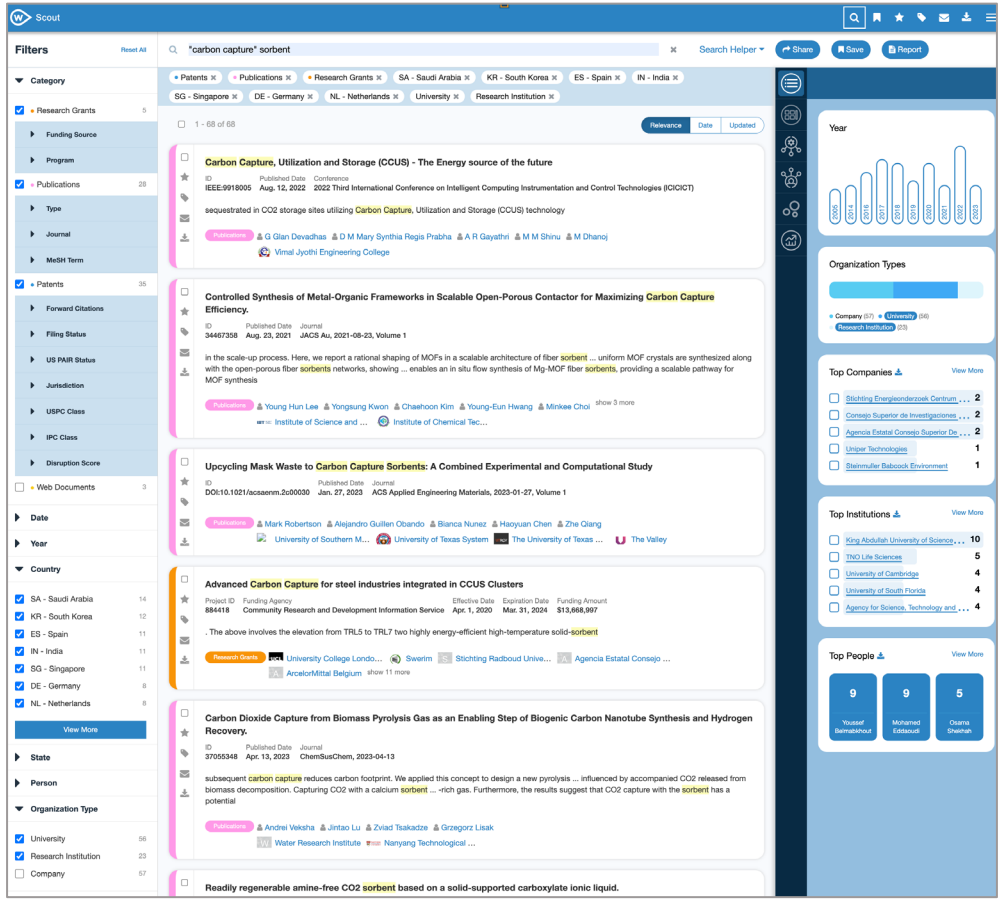


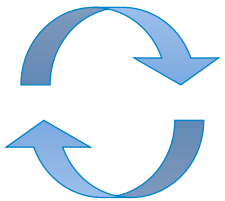




Parting Thoughts

The big picture: an iterative process





Complete the process with discipline & structure

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THE SEARCH ENGINE FOR INNOVATION

WELLSPRING SCOUT is a cloud-based scouting solution that connects organizations to innovation ecosystems and allows them to see disruption before it happens. R&D groups, tech scouts, innovation teams, and more use Scout to identify trends, discover emerging technologies, find startups, and foster corporate partnerships in a centralized system. Scout's federated search engine aggregates over **400 million records** from over **2,000 proprietary and public databases** across 10 different IP categories.

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