

Deal Sheet: An Impactful Way to Reflect Your Achievements

Glen Gardner, President

Gardner Innovation Search Partners

Dr. Nichole Mercier, Assistant Vice
Chancellor & Managing Director for
Technology Transfer

Washington University in St. Louis

Hire Standards.



Meet The Presenter: Glen Gardner

- President of [Gardner Innovation Search Partners](#), a recruiting firm specializing in:
 - Technology Transfer
 - Commercialization
 - Intellectual Property Management
 - University/Industry Partnerships
 - Venture Development
 - Academic Corporate Engagement
- Work mainly with universities, as well as national laboratories, research centers, and hospitals



Meet The Presenter: Dr. Nichole Mercier

- Assistant Vice Chancellor & Managing Director for Technology Transfer at Washington University in St. Louis
- Sets the strategy for technology transfer at the University and oversees all operations relating to the licensing and protection of intellectual property assets
- Developed and directed all educational outreach to the University community and instituted the Women in Innovation and Technology (WIT) Program



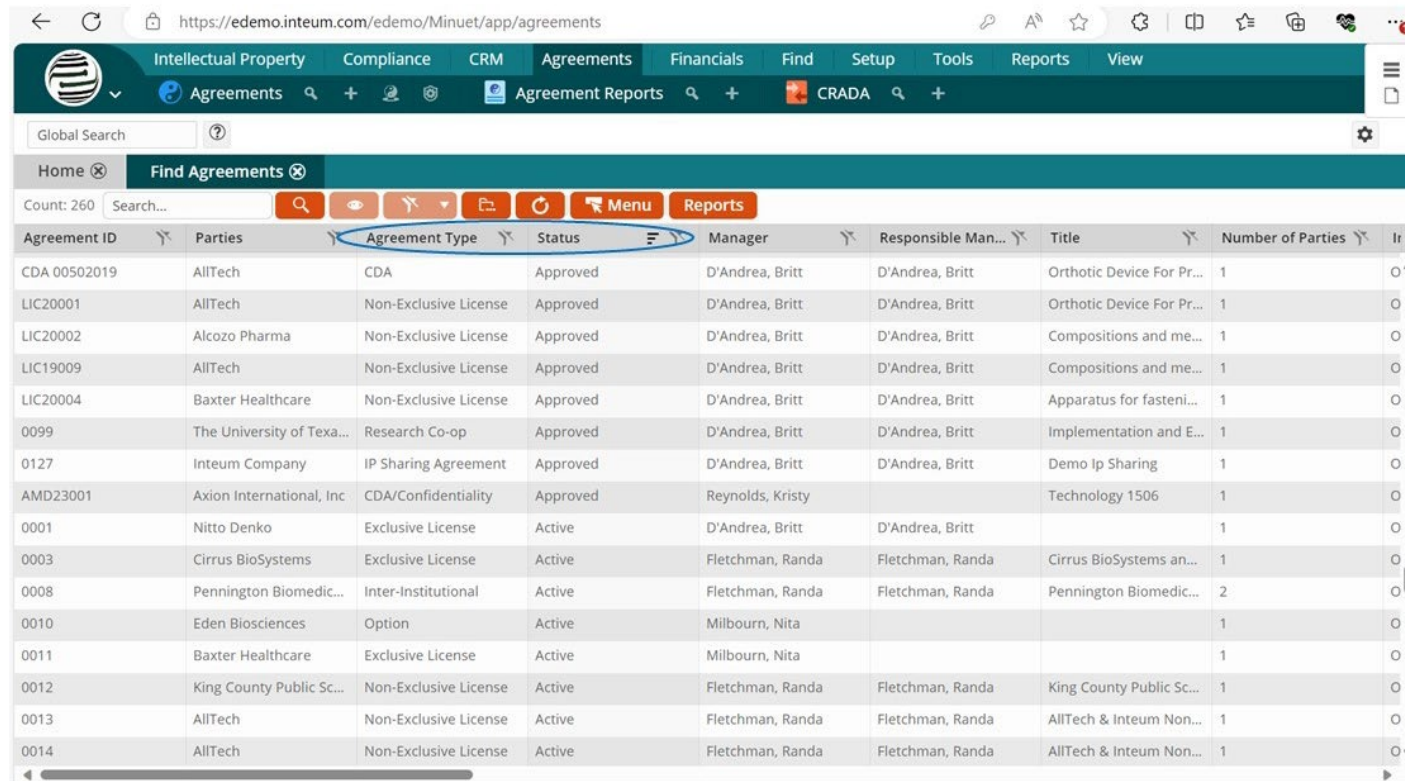
What Kind of Deals?

- ▶ We are not looking for anything confidential
- ▶ Exclusive License
- ▶ Non-Exclusive License
- ▶ Confidentiality Agreements
- ▶ Material Transfer Agreements
- ▶ Inter-Institutional Agreements
- ▶ Software/Data Use Agreements
- ▶ Options
- ▶ Memorandum of Understanding
- ▶ Cooperative Research and Development Agreement
- ▶ Work for Other Agreement



Where Can I Find This Report?

- ▶ In [Inteum](#). You can track all your deals here.



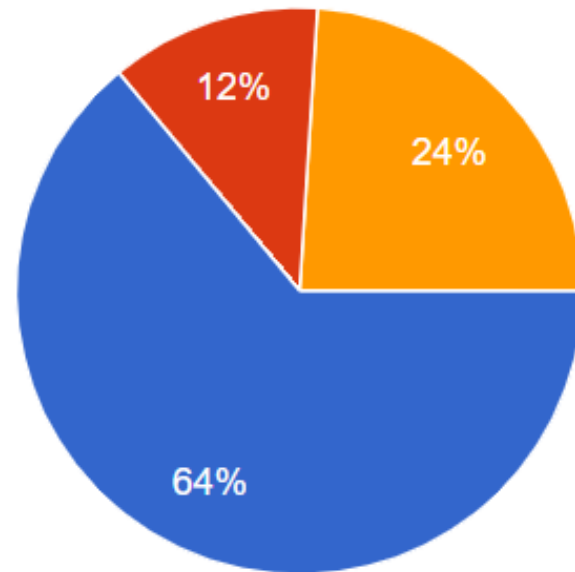
The screenshot shows the Inteum web application interface. The browser address bar displays <https://demo.inteum.com/demo/Minuet/app/agreements>. The application has a dark teal header with navigation tabs: Intellectual Property, Compliance, CRM, Agreements, Financials, Find, Setup, Tools, Reports, and View. Below the header is a sub-header with 'Home' and 'Find Agreements' tabs. A search bar and a 'Global Search' button are visible. The main content area displays a table of agreements with 260 results. The table has columns for Agreement ID, Parties, Agreement Type, Status, Manager, Responsible Man..., Title, and Number of Parties. The 'Agreement Type' and 'Status' columns are circled in blue. The table lists various agreements with details such as Agreement ID, Parties, Agreement Type, Status, Manager, Responsible Man..., Title, and Number of Parties.

Agreement ID	Parties	Agreement Type	Status	Manager	Responsible Man...	Title	Number of Parties	Ir
CDA 00502019	AllTech	CDA	Approved	D'Andrea, Britt	D'Andrea, Britt	Orthotic Device For Pr...	1	0
LIC20001	AllTech	Non-Exclusive License	Approved	D'Andrea, Britt	D'Andrea, Britt	Orthotic Device For Pr...	1	0
LIC20002	Alcozo Pharma	Non-Exclusive License	Approved	D'Andrea, Britt	D'Andrea, Britt	Compositions and me...	1	0
LIC19009	AllTech	Non-Exclusive License	Approved	D'Andrea, Britt	D'Andrea, Britt	Compositions and me...	1	0
LIC20004	Baxter Healthcare	Non-Exclusive License	Approved	D'Andrea, Britt	D'Andrea, Britt	Apparatus for fasteni...	1	0
0099	The University of Texa...	Research Co-op	Approved	D'Andrea, Britt	D'Andrea, Britt	Implementation and E...	1	0
0127	Inteum Company	IP Sharing Agreement	Approved	D'Andrea, Britt	D'Andrea, Britt	Demo Ip Sharing	1	0
AMD23001	Axon International, Inc	CDA/Confidentiality	Approved	Reynolds, Kristy		Technology 1506	1	0
0001	Nitto Denko	Exclusive License	Active	D'Andrea, Britt	D'Andrea, Britt		1	0
0003	Cirrus BioSystems	Exclusive License	Active	Fletchman, Randa	Fletchman, Randa	Cirrus BioSystems an...	1	0
0008	Pennington Biomedic...	Inter-Institutional	Active	Fletchman, Randa	Fletchman, Randa	Pennington Biomedic...	2	0
0010	Eden Biosciences	Option	Active	Millbourn, Nita			1	0
0011	Baxter Healthcare	Exclusive License	Active	Millbourn, Nita			1	0
0012	King County Public Sc...	Non-Exclusive License	Active	Fletchman, Randa	Fletchman, Randa	King County Public Sc...	1	0
0013	AllTech	Non-Exclusive License	Active	Fletchman, Randa	Fletchman, Randa	AllTech & Inteum Non...	1	0
0014	AllTech	Non-Exclusive License	Active	Fletchman, Randa	Fletchman, Randa	AllTech & Inteum Non...	1	0

Deal Sheet Survey

Is a Deal Sheet helpful for reviewing candidates?

50 responses



- Yes
- No
- Sometimes

Comments from Deal Sheet Survey: What Do Other Leaders in Tech Transfer Say?

Number of deals, size of company, size of deal (total value) if possible, your role.

Caseload

Just the presence of a deal sheet shows us that the candidate really gets what we are looking for, and will almost certainly lead to an interview, given how few deal sheets we actually see.

Partial breakdown of financials

Deal sheet with relation to the institute size, IE Comparing Stanford to a smaller research institute

Types of deals and number of deals.

Different partnering models



Comments (cont'd)

What does the deal team look like at your office?

Any related press related to the deal

Experience in negotiating contracts in specific industries and/or technologies

Deal Highlights

Anything that shows creativity

Your role in the negotiation

First seat vs second seat

Time to close deal

What is the underlying tech for the deal

Comments (cont'd)

TRL level

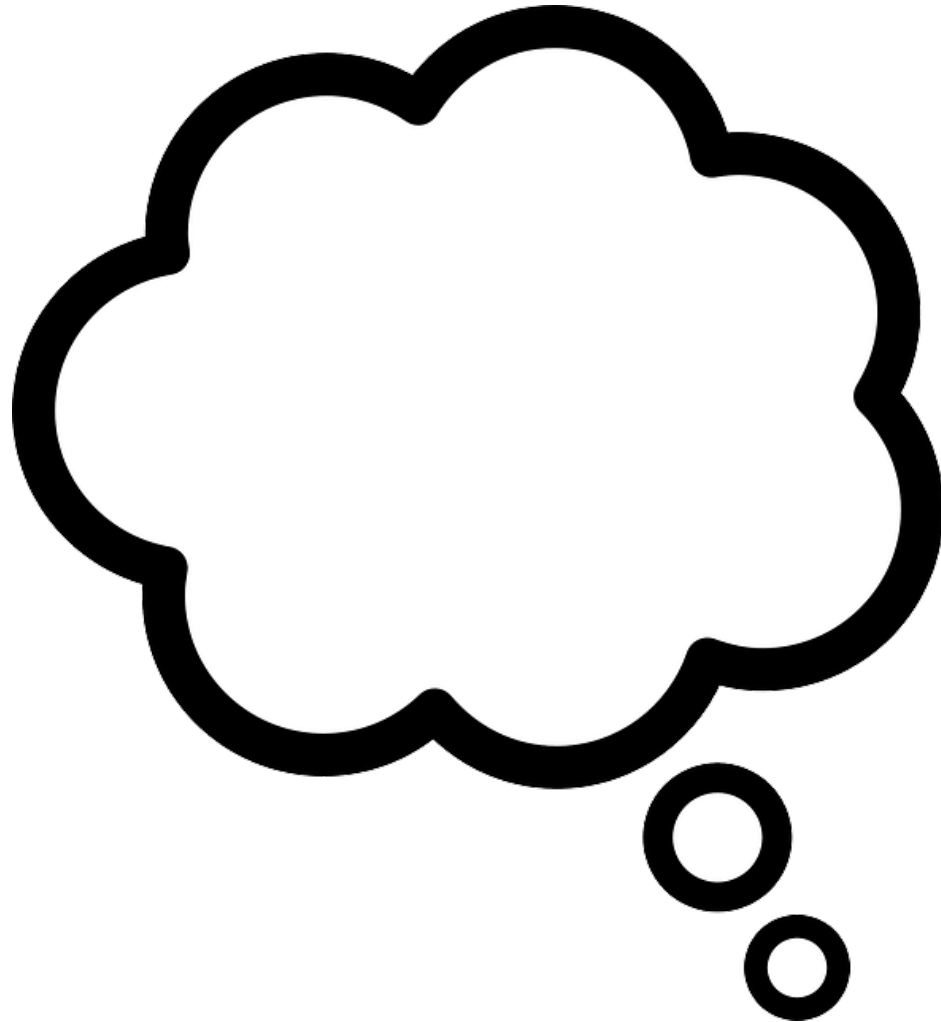
Terms such as
equity/royalty/milestone
payments

While deals are
important and
reflect an individuals
ability to negotiate a
license. They do not
demonstrate the
skills needed to
negotiate, the
personality, and the
ability to
communicate

Buy v. sell side
experience

Total dollar
amounts are
not important
to me

What Are Your Thoughts?



Questions?

- ▶ Feel free to connect with us on LinkedIn!
 - ▶ [LinkedIn Glen Gardner](#)
 - ▶ [LinkedIn Nichole Mercier](#)

