Checklist for network meetings[1]

Organizations (government, public knowledge and healthcare institutions, companies and patient organizations) and professionals (citizens, patients, healthcare professionals, policy makers) are often more than willing to talk to researchers. The Amsterdam UMC, VU and UvA name open doors quite easily. This also means you must prepare your meetings carefully: you are not only representing yourself but also your institute.

This checklist helps to prepare a network meeting. The degree to which these components should be used depends on:

- the sector or environment in which the potential collaboration partner works;
- the type of collaboration you wish to enter into: funding, joint or contract research, consultancy, education, internships, trials;
- the complexity of the topic of collaboration: the more complex, the more depth and meetings will be needed. One meeting usually doesn't lead to an immediate result.

A meeting is structured as follows:

1. Preparation
2. Introductions and connecting
3. Asking questions
4. Follow-up arrangements

1. Preparation

- ☐ Define what it is you want from this meeting or potential collaboration partner and what you have to offer.
- ☐ Try to get more information on the sector or environment in which your potential collaboration partner is active (via Internet and conversations with others in your network).
- ☐ Establish your potential collaboration partner's interests or challenges (verify via your network whether you have identified the right problems).
- ☐ Prepare possible win-win scenario's why you should collaborate (this can also be discussed and determined during the meeting).
- ☐ Read the website where your potential collaboration partner works carefully. Try to figure out what strategic themes or goals are important for the organization.
- ☐ Prepare questions (after conducting the above mentioned preparatory work).
- ☐ Identify any possible objections (such as money, time, organizational issues) and formulate an effective response to them.
- ☐ Involve (experienced) colleagues or an impact/ business developer of IXA or your research institute to join you or to prepare the meeting.

[1] Based on the checklist of the IXA valorisation guide – practical handbook

2. Introduction and connecting

- ☐ Introduce yourself and explain (shortly and to the point) your goals and interests ('For me it's important that….').
- ☐ Focus on content during the first meeting, win-win situations and 'what's in it for them?', be genuinely interested and don't (only) go for getting a big bag of money. That doesn't work, for nobody.
- ☐ Look for interaction. Figure out what your potential partner already knows about your research or impact-idea. What would you like to find out? Do not only think about the content, but also the organization and the way they would like to collaborate.
- ☐ Show enthusiasm. Collaborating with passionate people is motivating.
- ☐ Keep it professional and do not be overfamiliar.
- ☐ Determine mutual goals, added value and the needs and interests. Can we create a win-win situation by working together?
- ☐ Check the decision-making authority of your potential partner. Are you talking to a decision maker, influencer or budget holder?
- ☐ Outline briefly your approach, your team, way of working, costs and feasibility.
- ☐ Stay connected with your potential partner and, during the meeting, occasionally test whether you are still on the same page by giving a brief summary or asking a question ('Do I understand correctly that…?').

3. Asking questions

- ☐ Listen carefully and ask questions (guidelines: be open, honest, and curious; don't put words in someone else's mouth; check instead of assuming).
- ☐ Ask open questions ('w' questions: who, what, where, why, when).
  - ☐ What are the trends within the sector and their consequences for your potential partner?
  - ☐ What are your potential partner's interests and goals? Think about different levels: organization, function and personal. What is he/she held accountable for?
  - ☐ What are your potential partner's needs and how important are they?
  - ☐ What budgets are available or what is a solution or collaboration 'worth' to your potential partner?
- ☐ Determine who makes decisions and how the process takes place.
- ☐ Identify motives / drivers at organization, on a function/ job and personal level.

4. Follow-up arrangements

- ☐ Summarize the main points of the meeting and arrange follow-up activities.
- ☐ Write (and announce this during the meeting) a short summery of the meeting and send it to your potential partner.
- ☐ Call afterwards to check the response to the meeting and initiate and coordinate follow-up actions.