



Team Lead How-To Guide



Introduction

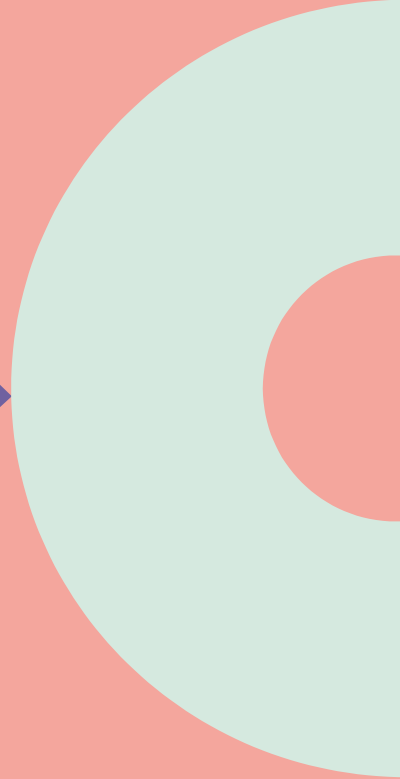
Catherine Aaronson
Doctorate of Veterinary Medicine Candidate
With CyBIZ for 1 year!



Olivia Heindel
Marketing & Consulting
With CyBIZ for 2+ years!

01

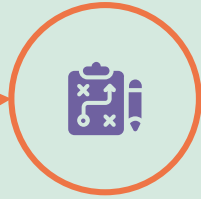
Timeline



Leadership Process

Kickoff

The time to plan! Get organized, set reminders, make things automatic for less work on your plate.



Midpoint

Use this also as a team check-in: are you at the right point in progress? Has everyone added to the final prez? Does the client like the direction you're going? Even if you have a TT, still 'make' a midpoint check-in!

Final

Aim to have everything wrapped up within a week of each other



1	Kickoff Meeting w/ Team Kickoff Meeting w/ Client
2	
3	
4	Midpoint Practice Presentation w/ Alex or Blake
5	Midpoint Presentation (Alex or Blake should come)
6	
7	
8	Final Report due to Alex & Blake for Review
9	Final Practice Presentation w/ Alex or Blake
10	Final Presentation (Alex or Blake should come)

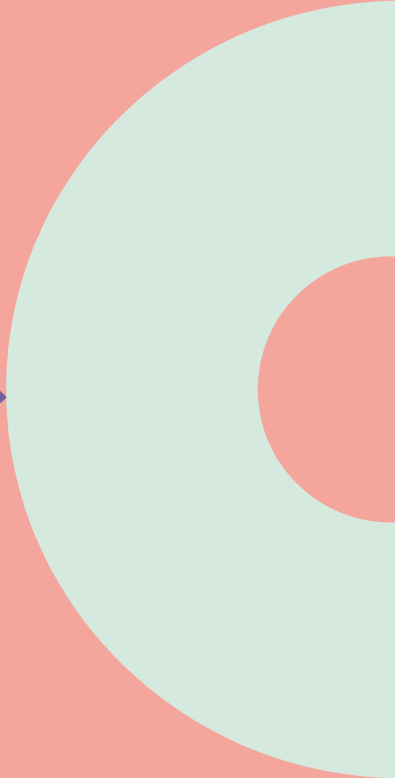
HINT:

If you start Monday, 10 weeks from September 16 is the week before Thanksgiving Break!

02



Make Things Easier



Create automations and samples

- During the planning phase, create automatic weekly/biweekly reminders for yourself in your phone or use the To Do/Tasks function in Microsoft/Outlook or use an app
- Set up work blocks on your calendar each week so you know you have dedicated time to each project
- During your first round of working as a team lead, save samples of emails you know you will send again (i.e. kickoff email) →
- When you think of something you'd like to cover in a future meeting, add it to a list so you don't forget and have an internal agenda for what to discuss at meetings.
 - Likewise, while the meeting is happening, take your own notes you can then build off of to make Minutes on later.

Intro to client/kickoff to project

Sample:

Good evening _____,

As Blake mentioned, my name is Catherine and I am the Team Lead for this project! I am thrilled to be working on another science-based project -- your technology sounds so interesting!! I cannot wait to see what we accomplish.

Our next step is to set up a kickoff meeting between us and the other member of our team, Tommy. Due to our class schedules, the best times for Tommy and I to meet would be mid-late afternoon of most days. Could you please send me days/times you would be available next week or the following week? Secondly, would you prefer to meet in person or virtually?

Once you send over your preferences, I will double check schedules on our end and send over a calendar invite to confirm.

Please let me know if you have any questions, otherwise, I look forward to getting this project started!

Thanks and all the best,

Weekly Tasks

- ▶ **Weekly TO DO:**
 - Beginning of week (Sunday/Monday): send out weekly agenda to the team, reminders of tasks assigned, and reminder of meetings for the week
 - If Meeting with client that week:
 - Day before= send agenda (any info they should know, what agenda tasks were last week and how we moved towards this goal, agenda tasks for upcoming week, any questions, and restate the next meeting time)
 - Day after= send review
 - If Not Meeting with client that week:
 - Near end of week: send out email with updates (any info they should know, what agenda tasks were last week and how we moved towards this goal, agenda tasks for upcoming week, any questions, and restate the next meeting time)
 - Enter in hours to both Workiva and W Desk

Example of weekly post



Aaronson, Catherine L 3/28 7:14 PM

Week 7, 3/28-4/4

Meetings this week:

1. Monday, 4/1 @4pm: meeting with Siddique. The plan is to mostly talk with him about your findings and questions, Tommy!
2. Our internal, as usual, Thursday the 4th.

Assignments for this week:

1. [Collins, Thomas](#): everything we talked about in our call (you to look more into the legal docs and get Blake's take when you have time before the meeting with Siddique on Monday) and once you get these answers, this should guide your next research steps. Please take a look at the final report-- I completed the Table of Contents so we have an outline for our report/the final presentation will mirror those same topics.
2. @me: I'm going to do a deep dive through the market report, now that Siddique purchased it and we have it as a PDF (btw-- I uploaded it into our Teams Files so you can look through it if you want to). This upcoming week will be lighter for me on workload because I've got three exams + my first surgery as head surgeon 🙄

[see less](#)



Reply

Example of Agenda / Minutes



DOUBLE HAPLOID SEED TECH & CYBIZ LAB

Date: Monday, March 18th

Time: 4:00-4:30pm

Location/Platform: Microsoft Teams -- [Join the meeting now](#)

AGENDA:

- Updates from the CyBiz team on progress thus far
- Updates from the CyBiz team on next steps
- Questions from CyBiz team
 - Possible [third party](#) market report found
 - Bayer/Monsato questions
 - Personal thoughts on buy-out vs licensing
- Any remaining questions/comments



DOUBLE HAPLOID SEED TECH & CYBIZ LAB

Date: Monday, March 18th

Time: 4-4:30pm

Location/Platform: Microsoft Teams

ACTION ITEMS:

- Siddique
 - Talk with contact at Iowa State to determine if grant/funding will cover the cost of the \$500 research report – report back to Catherine with next steps (Catherine can supply the payment link if approved)
 - Talk with legal contact at Iowa State to determine if Tommy can share patent paperwork with legal contacts for guidance
- Catherine
 - Continue looking into how companies' market/engage with researchers, acquire new technology (to see what the process would look like for Siddique)
 - Research money interests in licensing vs start ups and how similar tech has fared when looking at these two options
- Tommy
 - Work with legal contacts to discuss how patent/inventor ownership works when looking into corporation creation/LLC/~~etc~~ options
 - Continue researching the different corporation levels and pros/cons to provide solid recommendations
 - Research how to position this seed tech in the market—marketing best practices

MINUTES:

- Updates from the team & questions/answer
 - Catherine and Tommy shared their updates on research up to this point in the project
 - The seed tech industry is mostly owned by large conglomerates, even locally owned companies that advertise as 'family owned' are still secretly owned by companies like Bayer, BASF
 - This is a [multi-billion dollar](#) industry as is right now, with a strong CAGR and expected projections to practically double by 2028
 - There are a lot of options when it comes to how this tech can be released, whether in LLC, S-Corp, C-corp, amongst others.



- Siddique would prefer to find a balance between outreach of the tech and profits of the tech, with no real preference to either
 - There is also no reservations on being bought out by a larger company, which is the most likely course of action that will happen with how the majority of similar tech has fared
- Siddique clarified that ISU is the patent owner, but he is the inventor on the patent. Unsure about legal ramifications of this, and if this limits our options when it comes to how to license/commercialize:
 - Tommy will continue to look into this as his immediate next steps.
- Clarified that Monsanto is entirely owned by Bayer
- Catherine presented a potential market research report to buy- it would prove extremely helpful because finding published numbers on the seed tech industry is limited due to how niche the market is. This market report has been discussed for \$500. Catherine shared some of the figures that would be included in the report, and Siddique agreed this would be valuable and would discuss the possibility of purchasing this with his Iowa State contact. If agreeable to purchase, Catherine will provide the purchase link to Siddique and then Catherine will review the report in full to add to the final presentation/report.

Example of Bi-Weekly Update Email

CyBiz Lab Weekly Update | 3.7



Aaronson, Catherine L

To: 🇵🇰 Muhammad-Aboobucker, Siddique [AGRON]

Cc: 🇺🇸 Collins, Thomas



Thu 3/7/2024 4:38 PM

Good afternoon **Siddique**,

Thank you for answering our previous questions, your answers were extremely helpful and exactly what we needed!

This past week, Tommy looked into more creative solutions under the commercialization branch-- patents, intellectual property, creating corporations, and LLCs. I looked into local seed tech companies and started to find how many there are/how they operate and acquire new tech/how a lot of them advertise as local but are actually owned by the conglomerates.

This upcoming week, I will be researching how large companies communicate/buy out individual technology and market to researchers, whereas Tommy will be diving deeper into the topics he began looking at this week and work with some subject matter experts for more information.

Our questions for you:

1. Tommy discovered that new seed tech can be patented as long as it is a unique/specific DNA gene. Before we pursue this route further, can you please confirm that your technology is proprietary to you, and unique enough to be patented?
2. You mentioned that you work with a partner/team. Do they have any opinions/conflicts of interest in this? Will the final decision on whether to license or commercialize be entirely up to you, or will they have a say in the final decision as well?

Thank you for your review and we look forward to hearing from you!

All the best,

Catherine Aaronson

CyBIZ Lab – Team Lead & Business Analyst

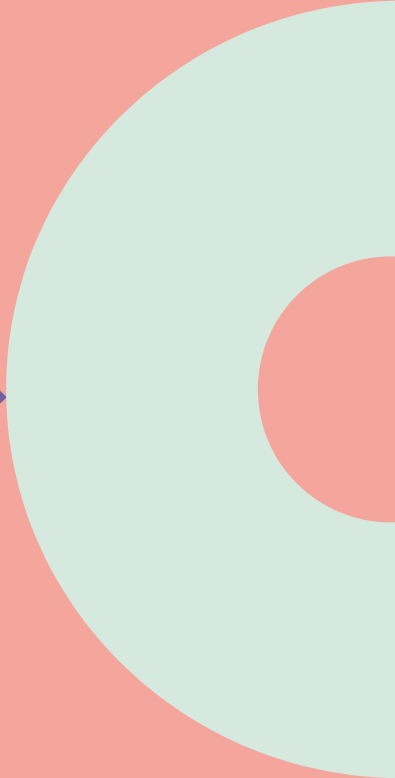
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Detailed Task List



Pre-Kickoff

Once Receiving Team Intro Email:

- Reply to the client ASAP, CC Blake and Alex, greet them and let them know the next step is scheduling kick-off meeting
 - Ask the client if they prefer in person or virtual meetings
 - Send them a When2Meet AND send this same one to your team
- After When2Meet has been filled out, let the client know you are sending an invite and book a room if needed (CC Blake/Alex)
- Schedule (send calendar invite) the kickoff meeting**
 - Schedule the pre-kickoff meeting with internal team before this**

Pre-Kickoff Meeting (with internal team)

- Introduce everyone, talk about preferred communication (Teams and liking messages)
- Review the scope and come up with questions to ask the client that we need to clarify
 - Assign each person to ask a different question
- Discuss roles in the group (I will do contacting, scheduling, and notes during client meetings/presentations)
 - Split up the scope per person, so everyone can claim now what they'd like to work on and manage during project
- Set up weekly team meeting time
 - Send out meeting invite
 - Set tentative midpoint prez deadline and final prez deadline -- block off now to avoid conflicts

Example Project: CyTown

Market Research: Determine which stores should go in CyTown. Do secondary research into other college towns to see which stores are most profitable. Use population data of the college students and other community members to determine which stores are best fit for demographics. There are 20 spaces for stores. Also determine the marketing strategy that will allow these stores to be profitable when Amazon is always an option.

Financial Analysis: After determining the stores to put in CyTown, create a chart of price markups which can be used to make a profit when moving items throughout the supply chain. Determine what the 100 most important items (total number across all 20 stores) that need to be sold. Create a price markup and justification for each item. Additionally, determine the estimated ROI of the 100 most important products when using your determined markup percentages.

Population Food Sensitivity Planning: CyTown is also going to have 10 sit-down restaurants and 10 street vendors. Evaluate the population that comes to Ames for game day and determine the top 40 menu items that should be sold on gameday (7:30am-10:30pm). However, the sit-down restaurants will also be open on non-game days for dinner (4:30-10pm Tuesday-Sunday). The food you choose should be able to be sold on both game days and non-game days. Use secondary research to determine food allergies and ensure there are safe menu options available for the top 10 most common food allergies in the USA.

Strategic Mapping: Using a map of CyTown, create three different map options of where stores and restaurants should be placed for maximum space efficiency and profit potential. Current planned buildings and greenspace areas cannot be moved; however, the greenspace should be used efficiently for foot-traffic and places for people to sit.

Kickoff + Post

Kickoff Meeting (with client)

- Introductions, explain a brief overview of the CyBiz timeline
- Review scope questions
- Ask client about preferences for meeting check ins (weekly, biweekly.etc?), confirm time
 - Ask client for scheduling availability for both midpoint and final presentation, confirm time

Post Kickoff meeting (plan!)

- Send out meeting invite for the client meeting check in (weekly or biweekly)
- Set up Assignment Task Sheet (and assign all tasks) -- share with the team
 - Outline topics for midpoint presentation as well -- assign with team
- Complete budget -- share with team
- Create design for midpoint presentation (save copy for the final) > share with team so they can add in as they want to
- Create final report > share with team so they can add as they see fit
- Set midpoint presentation day/time
 - Schedule practice (4 biz days before) with Blake/Alex
- Schedule final presentation
 - Schedule practice (4 biz days before) with Blake/Alex
- Go to the weekly to do list and create reminders in phone for recurring reminders

Midpoint

Pre-Midpoint Presentation

- Complete Table of Contents for final report > Send to Blake
 - Also, share with team and guide the flow of the midpoint/final presentation with this

Midpoint Presentation

- Slay

Post Midpoint Presentation

- Follow up with client
 - Provide them with a PDF copy of the PPT
 - Request feedback from client -- do they like our direction, what unanswered questions do we need to cover in the final, anything extra they need from us?
- Ensure the team has all included work up to this point (and from midpoint prez) in the final report, allot a week for that after the midpoint

Final



Final 2 Weeks

- Complete final prez and report
- Give final presentation > follow up with client in email letting them know we will be sending a copy of the final prez and the final report in a couple days
 - Send draft of final report to Blake/Alex (they get 5+ biz days to edit)
- Send final prez and PDF version of final PPT in an email, thank them for working with CyBiz!!
- Upload all documents to CyBox, and TAG!!

Wrap Up

Wrap Up

- Plan Lessons Learned with team (our regularly scheduled meeting time, 1 week after the final prez)
 - Before this meeting, write thank you cards to teams + deliver it to them at the LL
 - During this meeting, write thank you cards for clients

Best Tips for Success

Over communicate

With the client, your team, and with Alex/Blake

Stay organized

I created this template after being team lead once, and it took so much off my plate.

Ask for help

And know when you have a task upcoming you may need help on!

Understanding | On Task

Tread the line between understanding (we all have lives outside of this!) yet on task

Set realistic expectations

Have a goal, and then be okay with missing that goal (and make your 'miss' still okay).



Thank You!

Any questions?

