

TRANSACTION PATHWAY

# Innovation Management System Pathway

SEPTEMBER 2022



We built this pathway working with a large university incubator that manages 150 start-ups in its portfolio. The various forms can be edited to match your requirements. The intake form or onboarding summary can be sent to the start-up to complete as a guest, or you can invite them as a member of a Team to a specific version of the Pathway built just for them. It can be used by any person or organisation working in the innovation management space including incubators, innovation hubs, VC's etc, whether based in industry, government or academia

Once you have tailored this Pathway to match your requirements, set it as "My Template" and then use as your standard process.

STAGE	TASKS	TASK FORMS	TASK DOCUMENTS
<b>Intake Management</b>	<ul style="list-style-type: none"> <li>➤ Complete onboarding summary</li> <li>➤ Basic Company information</li> <li>➤ Company Marketing information</li> <li>➤ Company Appointments</li> <li>➤ Authorised signatories Information</li> <li>➤ Management Team information</li> <li>➤ Company Stage</li> <li>➤ Seeking Support?</li> </ul>	<ul style="list-style-type: none"> <li>➤ Venture Application</li> <li>➤ Basic Company Information</li> <li>➤ Company Marketing</li> <li>➤ Company appointments form</li> <li>➤ Authorised Signatures Template Document</li> <li>➤ Complete Relevant Sections of KIDD</li> <li>➤ Company Stage form</li> <li>➤ Seeking Support form</li> </ul>	<ul style="list-style-type: none"> <li>➤ Authorised Signatures Template</li> <li>➤ KIDD Template Document</li> </ul>
<b>Application Review and Assessment</b>	<ul style="list-style-type: none"> <li>➤ NDA Completion and Signature</li> <li>➤ OneNDA Word V2</li> <li>➤ Review onboarding summary and application form</li> <li>➤ Initial meeting with start-up</li> <li>➤ Assess/confirm stage start-up is in</li> <li>➤ Assess level and kind of support required</li> </ul>		<ul style="list-style-type: none"> <li>➤ OneNDA V.1 Fillable PDF</li> <li>➤ OneNDA Word V2</li> </ul>
<b>Mentor and Advisor and Other Support Assignments</b>	<ul style="list-style-type: none"> <li>➤ Create mentor details</li> <li>➤ Advisor Appointment</li> <li>➤ Partner Appointment where applicable</li> </ul>	<ul style="list-style-type: none"> <li>➤ Generic Contact Form</li> </ul>	
<b>Ongoing Mentorship (repeating)</b>	<ul style="list-style-type: none"> <li>➤ Follow-up Meeting(s) with Startup</li> <li>➤ Re-assess Startup Stage</li> </ul>	<ul style="list-style-type: none"> <li>➤ Start-up Consultation Notes</li> </ul>	
<b>Initial Business Evaluation</b>	<ul style="list-style-type: none"> <li>➤ Review Business summary</li> <li>➤ Intellectual property review</li> <li>➤ Company Marketing information</li> </ul>	<ul style="list-style-type: none"> <li>➤ Business Summary Review Form for comments</li> <li>➤ Company Marketing</li> </ul>	

STAGE	TASKS	TASK FORMS	TASK DOCUMENTS
	➤ Company Appointments	➤ Company Appointments Form	
Verification	<ul style="list-style-type: none"> <li>➤ Research methodology and Results</li> <li>➤ Competitor analysis</li> <li>➤ Regulatory constraints</li> <li>➤ Intellectual Property Registrations</li> </ul>		
KPI's/Metrics/ Growth Factors	<ul style="list-style-type: none"> <li>➤ Develop or build KPI table</li> <li>➤ Target addressable Market/Serviceable addressable Market</li> <li>➤ Product Market Fit</li> <li>➤ Customer Acquisition</li> <li>➤ Revenue Generation</li> </ul>	<ul style="list-style-type: none"> <li>➤ Product Market Fit</li> <li>➤ Customer Acquisition</li> <li>➤ Revenue Generation</li> </ul>	
Business Evaluation	<ul style="list-style-type: none"> <li>➤ Request Business Plan</li> <li>➤ Review updated Business summary</li> <li>➤ Review business plan provided</li> <li>➤ Review various supporting material</li> <li>➤ Assess whether business vision need further enhancement</li> </ul>		
Validation	<ul style="list-style-type: none"> <li>➤ Financial Forecasts</li> <li>➤ Valuation Amount and Justification</li> </ul>		
Introduction to Funding	<ul style="list-style-type: none"> <li>➤ Where appropriate, introduce to potential funding partners</li> <li>➤ Where appropriate, set up start-up in new Start-up initial business development to funding raise pathway, if not previously done</li> </ul>		

STAGE	TASKS	TASK FORMS	TASK DOCUMENTS
	➤ Mentor start-up through the funding process		