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Welcome to the Introduction to Strategy workshop page

This content is designed to provide an overview of how scientific enterprises use strategy to achieve their overarching goals. What is Strategy? Strategy is knowing where you want to be and how you want to get there. Strategy reflects both the long term and short term organizational goals. Defining your strategy helps you achieve your goals by directing your daily objectives. The goal of this workshop is to help prepare scientists who want to start their own labs, and inform scientists who want to go into industry. As a scientist, you may need to develop strategy as an individual, as part of a lab or group, and as part of a scientific enterprise. This page has lecture videos, case study information and other resources to help you prepare for the Business Strategy workshop.

The follow-up lectures in the Strategy4Scientists series include Strategic Collaborations [1] and Strategy Toolkits [2].

The strategy series is part of an overview course titled Business Concepts for Basic Scientists. You can also view the introductions to Finance [3] and Business Development [4].
LECTURE VIDEOS

This workshop is designed as a flipped classroom - participants will watch the videos before the class and discuss the cases in class.

It is mandatory to watch these videos before attending the workshop. Total video time for Parts I & II is approximately 30 minutes.

- Part I: Value Proposition [5]
- Part II: Organizational Capabilities [6]
- Part III: Parallels to Academia [7]

For your convenience, we have included the lecture slides [8].

Business strategy learning objectives

This workshop is designed to provide an overview of how scientific enterprises use strategy to achieve their overarching goals, and examples to illustrate the concepts. By the end of the workshop, you will be able to:

- Define strategy and how scientific enterprises use strategy
- Identify the value proposition of a scientific enterprise
- Determine key stakeholders for a scientific enterprise
- Discuss how organizational context impacts budget and resource allocation

PODCASTS - Strategy4Scientists

For this module, we suggest the following podcast episodes, which can be found on iTunes - Strategy4Scientists [9].

- Ken Lin, MD - Industry. Ken talks about setting strategy for two different companies and
the advantage of running lean, setting long term goals, and remaining agile.

- Mark Ansel, PhD - PI at UCSF. Mark discusses business concepts as they relate to building a lab including branding, understanding your strengths, and opportunity costs.
- Bob Farese, PhD - PI at Harvard Chan School of Public Health. Bob talks about integrity and excellence in communication are important to Bob's research brand. Bob also shares a unique organizational structure for running a lab.

**SMALL GROUP DISCUSSION**

During the in-class discussion, participants will break into small groups and identify one company’s strategy from their website. Participants who browsed the websites before class reported a more positive and engaging in-class experience. So go ahead and see how much of the company’s strategy you can identify from the website. *NOTE: Bring your laptop or tablet for this in-class activity.*

- **REQUIRED** - Watch the video - Identifying Strategy from a Company's Website [10].
  Note: this is a narrated, screen capture recording.
- **Review the companies** [11] ahead of time. Companies you might discuss include Global Blood Therapeutics [12], Intersect ENT [13], Juno Therapeutics [14], or any company your group is interested in learning about.

Questions to answer:

1. How would you describe the company’s value proposition?
   - Why is the work important?
   - What is unique about the technology or work product?
   - Who has a stake in the outcomes of the work and what do they value?
2. What can you say about their organizational context?
   - Where in the development cycle is the enterprise?
   - What is the structure of the enterprise (including funding)?
   - What resources are available to achieve objectives?
3. What is the company’s 1 - 3 year strategy?

**Speakers and course developers**

![ Speakers and course developers ]
Course speakers Deb Dauber, Sandra Waugh-Ruggles, and Anatol Kreitzer.

Deborah Dauber [15] has a Ph.D. in Chemistry and Chemical Biology from UCSF and a Master?s in Public Health with a focus in Health Policy & Management from UC Berkeley. She has 15 years of experience in pharmaceutical market analysis and strategy. Currently consulting with a focus in pharmaceutical competitive analysis, Deborah works with biotech firms to make informed business decisions based on in-depth assessment of competitors in development and on the market. Prior to that, Deborah was head of CI for Genentech, and led competitive intelligence initiatives to investigate key competitors (product and company-level), evaluate revenue impact of competition, and assess full market landscapes.

Sandra Waugh Ruggles [16] is a healthcare innovator and strategic marketer. Currently focused on consulting for small companies seeking to design and develop novel medical devices, Sandy was formerly in strategic marketing at Acclarent (part of J&J). She holds a PhD from UCSF in Biophysics, and was a Thomas Fogarty Fellow at the Stanford Biodesign program. Her first company, Catalyst Biosciences was formed in part from her thesis at UCSF, and is now a clinical stage, NASDAQ listed company.

Anatol Kreitzer, PhD [17] is an Associate Investigator at the Gladstone Institute of Neurological Disease and Associate Professor of Physiology and Neurology at UCSF. Dr. Kreitzer?s research focuses on the disordered physiological processes associated with Parkinson?s disease. He is an expert in the emerging field of optogenetics?the application of genetic and optical techniques to remotely control brain cells in animals. Dr. Kreitzer earned his PhD in neurobiology at Harvard University. He conducted postdoctoral research at Stanford University with Dr. Robert Malenka until 2007, when he established his laboratory at Gladstone.

Course contributors

Michael Penn, Jr., MD, PhD [18] - Vice President, Diversity, Outreach, J. David Gladstone Institutes

Brad Grueter, PhD [19] - Assistant Professor of Anesthesiology, Vanderbilt University

Calli Merkel, PhD [20] - Engagement Manager at inVentiv Health Consulting

Kinkead Reiling, PhD [21] - Entrepreneur and UCSF Biophysics alumnus

Kevin Mullane, PhD [22] - Director of Corporate Liaison and Ventures, J. David Gladstone Institutes

Bill Lindstaedt, MS [23] - Executive Director, Career Advancement, International and Postdoctoral Services, Student Academic Affairs, UCSF
Course producer

Thi Nguyen, PhD [24] - PI of grants funded to develop the course, and UCSF OCPD career development consultant. She now serves as the associate dean for graduate career and professional development at Washington University in St. Louis.

Interested in learning more about the course or delivering this workshop at your university? Facilitator packets, train the trainer materials, and resources for marketing and evaluating the workshop are available. Contact Thi at thi.nguyen@wustl.edu [25].

The educational videos were produced in collaboration with iBiology [26]. Videos found in the iBioMagazine section under "Business Concepts [27]."

Course funding

This course is provided at no cost to graduate students and postdocs thanks to funding by a Career Guidance for Trainees award from the Burroughs Wellcome Fund [28] and NIH [29] T32 administrative supplement (co-PI K. Mark Ansel).

Strategy modules

Introduction to Strategy is part of a Strategy4Scientists series that includes:

Strategic Collaborations [1]

and Strategy Toolkits [2]