

**KTSoftSkills - Soft Skills for Knowledge Transfer - Project n. 2022-1-IT02-KA220-
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Confidential Brief – Researcher

You are a senior academic and the lead scientist at a research lab in Northern Italy. You've spent over 15 years working on AI for medical imaging, and your latest breakthrough is a tool that could dramatically improve the detection of breast cancer. You are protective of your work and careful about whom you partner with.

Your objective today: You attended a health-tech conference to network with investors. In the conference, you arranged a 15-min meeting with a U.S. investor. It's your first time with this investor. You want to build trust, but you're not ready to disclose everything. Your goal is to secure a formal follow-up meeting in six months when your lab results are confirmed. Ideally, that conversation will be with this same senior investor – not with someone junior.

How to approach this conversation:

- Be formal and respectful. Use titles and maintain a structured tone.
- Emphasize your authority in the project. Make it clear that you are the key decision-maker.
- Propose a follow-up meeting with the same person. Politely push back if they try to refer you to a junior colleague.
- Highlight the technical sophistication of your tool, but don't reveal full details about your business plan.
- Avoid rushing. Mention that your lab results will be ready in six months. You're cautious and want to understand the investor's intentions.

What impresses you: If the investor acknowledges the difficulty and value of your research, you will be more open.

What bothers you:

- Being addressed by your first name.
- Long pauses or silence – they make you uncomfortable.
- Overly direct, fast-paced business talk that seems disrespectful or superficial.

Confidential Brief – Investor

You are a senior partner at a U.S. venture capital firm. You specialize in early-stage investments in European health tech. Your job today is to screen potential opportunities – quickly – and decide if they're worth passing along to your junior team for deeper review.

Your objective today: Determine whether this project is a good lead. If it is, your next step will be to involve your analysts. You don't usually attend early meetings yourself, so this is an exception.

How to approach this conversation:

- Be informal and efficient. Get to the point quickly.
- Try to uncover business potential, especially risks, timelines, and barriers to market entry.
- Don't worry too much about formalities – focus on facts and value. Offer a next step: a technical review with your junior colleagues.
- Let the researcher know your time is limited and that your analysts handle early-stage evaluations. Mention that your involvement depends on their initial analysis.

What impresses you:

- Clear, direct answers.
- A sense of urgency and practicality.

What bothers you:

- Vague or overly academic responses.
- Avoidance of business questions.
- Conversations that drag on without real insight.