Commercialization Metrics Worksheet

A practical worksheet for selecting, defining, tracking, and acting on commercialization performance measures

Use this worksheet to turn commercialization activity into measurable evidence. It is designed for startup teams, university spinouts, SBIR/STTR awardees, technology transfer groups, commercialization managers, and technical teams that need to define what progress looks like before they build a dashboard or report to funders, investors, partners, or leadership.

How to Use This Worksheet

- Start by defining the commercialization objective and the decision the metrics need to support.
- Choose a small set of meaningful metrics across market, customer, technical, funding, partnership, operational, and adoption categories.
- Define each metric clearly enough that different team members would calculate it the same way.
- Set a baseline, target, owner, reporting cadence, and evidence source for every priority metric.
- Use the final action section to convert metric findings into decisions, experiments, next steps, and accountability.

1. Commercialization Objective Snapshot

Complete this section before selecting metrics. The worksheet is most useful when the team agrees on the specific commercialization question being evaluated.

Project / technology name		**Worksheet date**	
Organization / team		**Prepared by**	
Current stage	☐ Discovery ☐ Validation ☐ Pilot ☐ Launch ☐ Growth	**Target market / use case**	
Primary commercialization objective		**Primary customer / buyer**	
Decision this worksheet supports	☐ Continue ☐ Pivot ☐ Fundraise ☐ Partner ☐ License ☐ Launch ☐ Scale	**Time horizon**	
Primary evidence gap		**Metric review cadence**	☐ Weekly ☐ Monthly ☐ Quarterly
Top risk to track		**Next review date**	

2. Metric Selection Map

Use this map to identify which metric categories matter most right now. Not every category needs to be tracked in every stage. Select the categories that will influence near-term decisions.

Metric Category	What It Helps Measure	Track Now?	Priority Notes
Market need and problem evidence	Customer pain, urgency, frequency, willingness to change	☐ Include ☐ Defer	
Customer discovery and buyer validation	Interviews, buyer roles, objections, buying process	☐ Include ☐ Defer	
Product / technology readiness	Technical maturity, performance, usability, integration readiness	☐ Include ☐ Defer	
Pilot and implementation evidence	Pilot outcomes, deployment friction, time-to-value, support burden	☐ Include ☐ Defer	

Commercial model and pricing	Pricing assumptions, revenue model, sales cycle, margin, cost to serve	☐ Include ☐ Defer	
Funding and investor readiness	Milestones, budget runway, non-dilutive funding, diligence materials	☐ Include ☐ Defer	
Partnership and licensing traction	Strategic partners, license interest, channel fit, university constraints	☐ Include ☐ Defer	
Operational and scale readiness	Capacity, staffing, workflow, quality, vendor or production readiness	☐ Include ☐ Defer	
Adoption, change, and stakeholder alignment	User readiness, training, resistance, leadership support, adoption barriers	☐ Include ☐ Defer	

3. Priority Metric Definition Table

Define each priority metric so it can be measured consistently. Avoid vague metrics such as traction, interest, or progress unless the team defines what those words mean in observable terms.

Metric Name	Definition / Formula	Evidence Source	Baseline	Target	Owner	Reporting Cadence
			Current: ___	Target: ___		☐ Weekly ☐ Monthly ☐ Quarterly
			Current: ___	Target: ___		☐ Weekly ☐ Monthly ☐ Quarterly
			Current: ___	Target: ___		☐ Weekly ☐ Monthly ☐ Quarterly
			Current: ___	Target: ___		☐ Weekly ☐ Monthly ☐ Quarterly
			Current: ___	Target: ___		☐ Weekly ☐ Monthly ☐ Quarterly
			Current: ___	Target: ___		☐ Weekly ☐ Monthly ☐ Quarterly
			Current: ___	Target: ___		☐ Weekly ☐ Monthly ☐ Quarterly
			Current: ___	Target: ___		☐ Weekly ☐ Monthly ☐ Quarterly

4. Suggested Metric Bank

Use the examples below as prompts. Select only the metrics that help the team make a decision or test an assumption.

Category	Possible Metrics
Market Evidence	Problem interviews completed; percentage confirming high pain; frequency of problem; urgency rating; workaround cost; budget visibility.
Customer and Buyer Validation	Named buyer roles; buyer/user distinction; qualified prospects; objections logged; buying process mapped; willingness-to-pay evidence.

Technology and Product Readiness	Core performance target met; prototype maturity; integration dependencies resolved; usability issues; defect rate; key task completion time.
Pilot and Implementation	Pilot sites recruited; pilot completion rate; time-to-value; user activation; support tickets; blockers; success criteria achieved.
Commercial Model	Price point; gross margin; customer acquisition path; sales cycle estimate; cost to serve; renewal likelihood; revenue milestone progress.
Funding and Investor Readiness	Runway remaining; milestone burn rate; investor meetings; diligence materials; grant milestones; matching funds; follow-on prospects.
Partnership and Licensing	Partner conversations; NDAs/MOUs; licensing pathway clarity; IP constraints; channel fit; strategic value score; partner next-step commitments.
Operational and Scale Readiness	Capacity utilization; staffing gaps; workflow cycle time; quality failure points; vendor dependency risk; training completion; repeatability.
Adoption and Change	Stakeholder support; training completion; resistance themes; active users; usage frequency; leadership reinforcement; communication coverage.

5. Assumption-to-Metric Worksheet

Important commercialization metrics should trace back to an assumption. Use this section to connect assumptions, evidence, and next decisions.

Commercialization Assumption	Metric to Test It	Evidence Needed	Current Evidence	Decision Threshold	Next Step
Customers experience the problem frequently enough to justify a solution.			☐ Strong ☐ Mixed ☐ Weak		
The buyer has budget and authority to purchase or sponsor adoption.			☐ Strong ☐ Mixed ☐ Weak		
The product or technology can meet the required performance standard.			☐ Strong ☐ Mixed ☐ Weak		
The solution can be implemented without excessive workflow disruption.			☐ Strong ☐ Mixed ☐ Weak		
A partner, licensee, customer, or funder has a clear reason to engage.			☐ Strong ☐ Mixed ☐ Weak		

The team can deliver, support, and scale the offering at acceptable cost.			☐ Strong ☐ Mixed ☐ Weak		

6. Baseline, Target, and Trend Tracker

Use this table during recurring metric reviews. The goal is not just to record numbers, but to identify whether the evidence is improving, flat, worsening, or inconclusive.

Metric	Baseline	Current	Target	Trend	Status	Interpretation / Notes
				☐ Up ☐ Flat ☐ Down	☐ On track ☐ Watch ☐ Off track	
				☐ Up ☐ Flat ☐ Down	☐ On track ☐ Watch ☐ Off track	
				☐ Up ☐ Flat ☐ Down	☐ On track ☐ Watch ☐ Off track	
				☐ Up ☐ Flat ☐ Down	☐ On track ☐ Watch ☐ Off track	
				☐ Up ☐ Flat ☐ Down	☐ On track ☐ Watch ☐ Off track	
				☐ Up ☐ Flat ☐ Down	☐ On track ☐ Watch ☐ Off track	
				☐ Up ☐ Flat ☐ Down	☐ On track ☐ Watch ☐ Off track	
				☐ Up ☐ Flat ☐ Down	☐ On track ☐ Watch ☐ Off track	

7. Commercialization Metrics Review Questions

Use these prompts during leadership, project, grant, investor, licensing, or commercialization review meetings.

☐ What changed since the last review, and is the change meaningful enough to influence a decision?

☐ Which metric has the strongest evidence, and which metric is still based mostly on opinion or assumption?

☐ Are any metrics improving while the overall commercialization case remains weak? If so, why?

☐ Are we measuring activity, evidence, or outcomes? Which activity metrics need to be replaced with evidence metrics?

☐ What is the most important missing data point before the next funding, partnership, pilot, or launch decision?

☐ Which metric suggests the team should pause, adjust the plan, run another experiment, or narrow the target market?

☐ Who owns the next evidence-gathering step, and what proof will show that it was completed?

8. Action Plan Based on Metrics

Convert metric findings into a concrete plan. Each action should connect to a metric or evidence gap, not just a general desire to improve commercialization readiness.

Metric / Evidence Gap	Action Needed	Owner	Due Date	Proof of Completion	Status

					☐ Not started ☐ In progress ☐ Complete
					☐ Not started ☐ In progress ☐ Complete
					☐ Not started ☐ In progress ☐ Complete
					☐ Not started ☐ In progress ☐ Complete
					☐ Not started ☐ In progress ☐ Complete
					☐ Not started ☐ In progress ☐ Complete

9. Notes and Follow-Up

Key findings from this metrics review:

_____

_____

_____

_____

Recommended decision or next gate: ☐ Continue ☐ Revise assumptions ☐ Narrow target market ☐ Run pilot ☐ Seek partner ☐ Fundraise ☐ Pause / reassess

Next review date: _____ Review owner: _____ Leadership sign-off: _____

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