SDI ScienceDocs Inc.
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Commercialization Plan Outline

A practical outline and worksheet for translating a scientific, technical, or innovation-driven idea into a fundable, executable, and market-oriented commercialization plan.

Company / organization:	_____	**Prepared by:**	_____
Project / technology:	_____	**Date / version:**	_____
Primary market:	_____	**Target customer:**	_____
Development stage:	☐ Concept ☐ Prototype ☐ Pilot ☐ Early sales ☐ Scaling	**Funding use:**	_____
Plan purpose:	☐ Internal planning ☐ SBIR/STTR ☐ Investor ☐ Partner ☐ License	**Planning horizon:**	☐ 6 mo ☐ 12 mo ☐ 24 mo ☐ 36 mo

1. Executive Commercialization Summary

Use this section to create a concise, decision-ready summary of the commercialization opportunity. This should be written last, after the plan assumptions and evidence are complete.

Summary element	Draft response
Commercialization thesis	What is the core business case for moving this idea forward?
Problem and customer need	Who experiences the problem and why does it matter now?
Solution / technology	What will be offered, and what makes it technically credible?
Target market entry point	Which first segment will be pursued and why?
Business model	How will the organization generate revenue or value?
Funding or partnership ask	What support, funding, access, or partnership is needed next?

2. Problem, Need, and Market Pull

Plan element	Included?	Key evidence / details	Action needed
The target problem is clearly defined in practical, customer-facing terms.	☐ Yes ☐ Partial ☐ No		
The problem is urgent enough that users, buyers, or funders may act.	☐ Yes ☐ Partial ☐ No		
The plan distinguishes users, buyers, beneficiaries, and decision makers.	☐ Yes ☐ Partial ☐ No		
Current alternatives, workarounds, or status quo options are identified.	☐ Yes ☐ Partial ☐ No		
The cost of inaction is described using time, money, risk, compliance, access, safety, productivity, or scientific impact.	☐ Yes ☐ Partial ☐ No		
Early customer discovery or stakeholder interviews have	☐ Yes ☐ Partial		

Plan element	Included?	Key evidence / details	Action needed
been conducted or planned.	☐ No		
Market pull is supported by evidence rather than internal belief alone.	☐ Yes ☐ Partial ☐ No		

Problem statement draft: In one to three sentences, describe the problem, affected audience, current gap, and why the timing matters.

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3. Solution, Technical Basis, and Value Proposition

Plan component	Prompts / worksheet fields
Solution description	What product, platform, service, process, algorithm, diagnostic, device, material, or workflow will be developed?
Scientific or technical basis	What evidence supports feasibility? Include publications, preliminary data, prototypes, pilots, prior grants, IP, validation studies, or expert review.
Value proposition	What measurable improvement does the solution provide over current alternatives?
Adoption requirements	What must users, buyers, institutions, or partners change to adopt the solution?
Primary proof needed next	What experiment, pilot, prototype, validation study, customer discovery effort, or regulatory evidence is the next critical proof point?

Value driver	Current baseline / alternative	Expected improvement	Evidence source	Confidence
Cost				☐ High ☐ Med ☐ Low
Time / throughput				☐ High ☐ Med ☐ Low
Accuracy / quality				☐ High ☐ Med ☐ Low
Risk / safety / compliance				☐ High ☐ Med ☐ Low
Access / usability / equity				☐ High ☐ Med ☐ Low

4. Target Market and Customer Segments

Define the first practical market entry point before describing broader opportunities. The first customer segment should be specific enough to guide discovery, pilots, pricing, and sales conversations.

Segment	User / beneficiary	Buyer / payer	Decision maker	Why this segment first?	Evidence
Primary beachhead					

Segment	User / beneficiary	Buyer / payer	Decision maker	Why this segment first?	Evidence
Secondary segment					
Longer-term segment					

Market definition item	Status	Evidence / notes	Action needed
Primary market segment is narrow enough to support focused outreach and testing.	☐ Yes ☐ Partial ☐ No		
Buyer, user, payer, and influencer roles are separated where relevant.	☐ Yes ☐ Partial ☐ No		
Customer workflow, procurement pathway, or adoption environment is understood.	☐ Yes ☐ Partial ☐ No		
Market size assumptions are connected to a clear segment definition.	☐ Yes ☐ Partial ☐ No		
Initial customers or pilot sites have been identified or prioritized.	☐ Yes ☐ Partial ☐ No		
Barriers to adoption are acknowledged, not minimized.	☐ Yes ☐ Partial ☐ No		

5. Competitive Landscape and Differentiation

Commercialization plans should compare the idea against real alternatives, including doing nothing, internal tools, manual workarounds, incumbent vendors, open-source tools, competing technologies, and substitutes.

Alternative / competitor	Who uses it?	Strengths	Limitations / gaps	Our differentiation	Evidence needed
Status quo / manual workaround					
Competitor 1					
Competitor 2					
Substitute / indirect alternative					

Differentiation claim	Evidence available	Risk if claim is challenged	Next validation step
Technically superior because...			
Commercially attractive because...			
Easier to adopt because...			
Protectable or defensible because...			

6. Business Model, Pricing, and Revenue Logic

Business model option	Fit?	Rationale / assumptions	Validation needed
Product sale	☐ Strong ☐ Possible ☐ Not likely		
Subscription / SaaS	☐ Strong ☐ Possible ☐ Not likely		
Service-enabled technology	☐ Strong ☐ Possible ☐ Not likely		
Licensing / royalty	☐ Strong ☐ Possible ☐ Not likely		
Data / analytics / platform access	☐ Strong ☐ Possible ☐ Not likely		
Government, foundation, or institutional funding-supported model	☐ Strong ☐ Possible ☐ Not likely		

Pricing / revenue hypothesis: What will customers or partners pay for, how often, and why will the price be justified?

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7. Development, Milestones, and Evidence Plan

Translate the commercialization concept into milestones that connect technical development, market validation, regulatory or operational evidence, and fundraising needs.

Milestone	Purpose	Owner	Start	Target completion	Evidence / deliverable	Risk
Milestone 1						
Milestone 2						
Milestone 3						
Milestone 4						
Milestone 5						

Milestone planning item	Status	Evidence / notes	Action needed
Technical milestones are measurable and tied to decision points.	☐ Yes ☐ Partial ☐ No		
Commercial milestones include customer discovery, stakeholder validation, market testing, or pilot commitments.	☐ Yes ☐ Partial ☐ No		
Regulatory, reimbursement, data, manufacturing, procurement, or operational requirements are included if relevant.	☐ Yes ☐ Partial ☐ No		
Each milestone has an owner, timeline, expected output, and risk assumption.	☐ Yes ☐ Partial ☐ No		
The next funding ask is	☐ Yes		

Milestone planning item	Status	Evidence / notes	Action needed
connected to the milestones it will enable.	☐ Partial ☐ No		

8. Regulatory, IP, Data, and Operational Considerations

Area	Key questions to answer	Current status	Owner / next step
Intellectual property	Is there background IP, invention disclosure, patent filing, license need, freedom-to-operate concern, or university ownership issue?		
Regulatory pathway	Does the solution require FDA, IRB, privacy, clinical, cybersecurity, safety, environmental, or other regulatory planning?		
Data governance	Will the solution use protected, sensitive, proprietary, third-party, or AI training data?		
Manufacturing / delivery	How will the product or service be produced, delivered, maintained, and supported?		
Quality / validation	What standards, documentation, testing, or validation will customers or funders expect?		
Implementation / adoption	What workflow, training, change management, or stakeholder alignment will be required?		

9. Funding, Partnership, and Go-to-Market Pathway

Pathway	Best use	Fit now?	Preparation needed
SBIR/STTR or other non-dilutive funding	Technology development, validation, commercialization preparation, and early proof points.	☐ High ☐ Med ☐ Low	
University license / spinout pathway	Commercializing academic IP through a startup, license, or partnership.	☐ High ☐ Med ☐ Low	
Strategic partner / corporate collaboration	Customer access, pilots, channel support, technical resources, or co-development.	☐ High ☐ Med ☐ Low	
Investor funding	Scaling team, sales, productization, regulatory path, or market expansion.	☐ High ☐ Med ☐ Low	
Service-first market entry	Early revenue, customer learning, and implementation feedback before full productization.	☐ High ☐ Med ☐ Low	

Go-to-market element	Plan draft / assumptions
First 5-10 target organizations	
Primary outreach message	
Pilot or demonstration offer	
Sales / adoption channel	
Partnership targets	
Key credibility assets needed	

10. Risk, Assumptions, and Decision Criteria

Key assumption	Why it matters	Current evidence	Confidence	Validation action
Customers have a meaningful problem.			☐ High ☐ Med ☐ Low	
The solution can achieve the required performance.			☐ High ☐ Med ☐ Low	
Users or buyers will adopt the solution.			☐ High ☐ Med ☐ Low	
The revenue model is plausible.			☐ High ☐ Med ☐ Low	
Regulatory/IP/data constraints are manageable.			☐ High ☐ Med ☐ Low	
Funding or partnership path is realistic.			☐ High ☐ Med ☐ Low	

Decision gate	Criteria to proceed	Criteria to pause or pivot	Decision date / owner
Move to proposal / funding pursuit			
Move to pilot or customer validation			
Move to partner or license discussions			
Move to product build or scale planning			

11. Next-Step Action Plan

Action	Purpose	Owner	Due date	Priority	Notes
Customer/ stakeholder discovery action				☐ High ☐ Med ☐ Low	
Technical validation action				☐ High ☐ Med ☐ Low	
Competitive/IP/ regulatory research action				☐ High ☐ Med ☐ Low	

Action	Purpose	Owner	Due date	Priority	Notes
Funding or proposal preparation action				☐ High ☐ Med ☐ Low	
Partner, pilot, or market outreach action				☐ High ☐ Med ☐ Low	

12. Commercialization Plan Completion Checklist

Completion item	Status	Evidence / notes	Action needed
The plan clearly explains the problem, target customer, and value proposition.	☐ Yes ☐ Partial ☐ No		
The technology description is specific enough to support funding, partner, or investor review.	☐ Yes ☐ Partial ☐ No		
Market entry is focused on a defined beachhead segment, not an overly broad market.	☐ Yes ☐ Partial ☐ No		
Competitive alternatives and differentiation are addressed honestly.	☐ Yes ☐ Partial ☐ No		
Milestones connect technical work to commercial proof points.	☐ Yes ☐ Partial ☐ No		
Regulatory, IP, data, implementation, and operational issues are acknowledged where relevant.	☐ Yes ☐ Partial ☐ No		
Funding, partnership, or go-to-market pathway is aligned with the current stage.	☐ Yes ☐ Partial ☐ No		
Risks and assumptions are visible and tied to validation actions.	☐ Yes ☐ Partial ☐ No		
The next 30-90 days of work are converted into owners, dates, and action items.	☐ Yes ☐ Partial ☐ No		

Final plan notes / open questions:

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Need help applying this tool? ScienceDocs supports commercialization, change management, AI adoption, grant strategy, and operational optimization.