SDI ScienceDocs Inc.
Research • Funding • AI Strategy • Est. 2004

Commercialization Strategy Template

A practical worksheet for startups, research teams, university spinouts, and innovation-driven organizations moving from technical progress toward market readiness, funding, adoption, and growth.

Organization / Venture	
Prepared By	
Date	
Technology / Product	
Current Stage	

Purpose of This Template

Commercialization requires more than a promising discovery or early technical success. It requires a practical strategy for translating an innovation into a product, service, partnership, licensing opportunity, or investable business model that can survive real market conditions.

Use this template to organize the core elements of a commercialization plan. It is designed for scientific startups, university-linked ventures, SBIR/STTR applicants and awardees, research teams, and companies preparing to connect technical work with customer needs, funding strategy, operational capacity, and market adoption.

This document can be completed internally, shared with advisors, or used to prepare for consulting discussions with ScienceDocs. It is not intended to replace a full business plan, regulatory strategy, or investor deck, but it can help clarify the foundation those materials should build from.

Commercialization Planning Maturity Scale

1	2	3	4	5
Not defined	Early / unclear	Partially developed	Mostly developed	Strong / ready

1. Commercialization Snapshot

Start with a concise summary of the opportunity and where the organization currently stands.

Item	Response
Core innovation	What technology, product, service, platform, or method is being commercialized?
Primary market problem	What urgent problem does this innovation solve? Who experiences the problem?
Current stage	Concept, prototype, validation, SBIR/STTR-funded development, pilot, launch, growth, licensing, or other.
Most important near-term goal	Example: customer discovery, grant submission, prototype validation, regulatory planning, investor outreach, pilot partner, or first revenue.
Strategic constraint	What limitation could most affect progress? Example: funding, data, technical risk, market access, regulatory uncertainty, staffing, manufacturing, or adoption.

2. Product, Technology, and IP Position

Clarify what is being commercialized, what makes it protectable or defensible, and how it compares to existing alternatives.

Planning Area	Prompt	Notes / Response
Product definition	What exactly will the customer, licensee, partner, or user receive?	

Planning Area	Prompt	Notes / Response
Technical proof	What evidence supports feasibility, performance, safety, utility, or superiority?	
IP position	What patents, licenses, trade secrets, data assets, copyrights, or know-how support the opportunity?	
Competitive alternatives	What do customers use today, including low-tech or non-consumption alternatives?	
Differentiation	Why is this approach meaningfully better, faster, cheaper, safer, more scalable, or more practical?	

3. Market and Customer Discovery

Use this section to translate the technology into a real customer, buyer, user, or partner context.

Planning Area	Prompt	Notes / Response
Target customer	Who is the first realistic customer, buyer, user, licensee, or pilot partner?	
Customer pain point	What problem is painful enough to justify adoption, budget, workflow change, or partnership?	
Evidence gathered	What interviews, surveys, pilots, letters of support, market research, or advisor input support the need?	
Buying pathway	Who evaluates, approves, funds, and uses the solution?	
Market segment priority	Which initial niche or beachhead market is most realistic and why?	

4. Value Proposition and Business Model

A strong commercialization strategy connects the value proposition to a realistic path for revenue, licensing, adoption, or scale.

Planning Area	Prompt	Notes / Response
Value proposition	What measurable or meaningful value does the innovation create?	
Economic value	Can the benefit be expressed as cost savings, new revenue, reduced risk, improved outcomes, or time savings?	
Revenue model	Product sale, subscription, service, licensing, data/API access, contract R&D, usage fee, manufacturing margin, or other.	
Pricing logic	What is the early reasoning behind price, budget owner, reimbursement, procurement, or licensing terms?	
Adoption friction	What will make customers hesitate, delay, or resist adoption?	

5. Regulatory, Compliance, and Evidence Pathway

Not every innovation is heavily regulated, but every commercialization plan should consider the evidence and compliance expectations needed for adoption.

Planning Area	Prompt	Notes / Response
Regulatory pathway	Is FDA, IRB, privacy, cybersecurity, export control, government contracting, data use, or other review relevant?	
Evidence requirements	What data will customers, funders, regulators, partners, or investors need before adoption?	
Quality / documentation	What SOPs, protocols, records, testing plans, or quality systems may be needed?	
Ethical / responsible use	Are there AI, data, patient, user, workforce, environmental, or safety considerations?	

Planning Area	Prompt	Notes / Response
Approval / procurement	What formal approvals or procurement steps could slow market entry?	

6. Funding, Milestones, and Resource Strategy

Commercialization often requires aligning technical work, market validation, and funding milestones into one coherent plan.

Planning Area	Prompt	Notes / Response
Funding sources	SBIR/STTR, foundation grants, corporate partnerships, university support, angel funding, VC, strategic investors, contracts, or revenue.	
Milestone alignment	Do proposed technical milestones support market, regulatory, investor, or partner expectations?	
Budget realism	Are staffing, development, testing, market research, regulatory, and operational costs realistically estimated?	
Non-dilutive strategy	Which grant or contract opportunities fit the commercialization path?	
Capital readiness	What evidence is needed before approaching investors or strategic partners?	

7. Go-to-Market, Partnerships, and Scaling

The go-to-market plan should identify the first practical path to adoption, not a vague plan to reach the entire market at once.

Planning Area	Prompt	Notes / Response
Initial market entry	What is the first realistic path: pilot, license, direct sale, distributor, university partner, hospital system, government buyer, or industrial customer?	
Partner needs	What partners are needed for validation, manufacturing, distribution, regulatory support, sales, implementation, or integration?	
Sales / adoption process	How long might adoption take, and who must be convinced?	
Operational readiness	Can the organization deliver, support, implement, and improve the offering if demand grows?	
Scaling risks	What could break or slow down as the organization moves from early validation to broader adoption?	

8. Commercialization Readiness Checklist

Use this checklist to identify major gaps that should be addressed before major funding, investor, partnership, or launch activity.

Readiness Item	Yes	Partial	No / Unknown
The target customer or buyer is clearly defined.	☐	☐	☐
The organization has evidence that the market problem is real and urgent.	☐	☐	☐
The product, service, or licensing offer is clearly described.	☐	☐	☐
The value proposition is understandable to non-technical stakeholders.	☐	☐	☐
The competitive landscape has been reviewed.	☐	☐	☐
The IP or defensibility position has been considered.	☐	☐	☐
Regulatory, compliance, privacy, or data-use issues have been identified where relevant.	☐	☐	☐
Grant, investor, or partner milestones are aligned with commercialization needs.	☐	☐	☐
The organization understands the first realistic path to adoption.	☐	☐	☐
Operational, staffing, and implementation needs have been considered.	☐	☐	☐

Commercialization Strategy Scorecard

Use the 1-5 maturity scale to summarize the current status of each planning area. Low-scoring areas can become immediate priorities for additional research, consulting, advisor review, or internal planning.

Planning Area	Score 1-5	Key Gap	Next Step
Technology / Product Definition	____		
IP and Competitive Position	____		
Customer and Market Discovery	____		
Value Proposition and Differentiation	____		
Business Model and Revenue Pathway	____		
Regulatory / Compliance Pathway	____		
Funding Strategy	____		
Go-to-Market and Partnerships	____		
Operations and Scaling Readiness	____		
Risk and Milestone Planning	____		

90-Day Commercialization Action Plan

Convert the completed strategy review into a focused action plan. Prioritize the activities that will reduce uncertainty, strengthen market credibility, support funding, or move the organization closer to adoption, partnership, licensing, investment, or revenue.

Priority	Action Item	Owner	Due Date	Success Measure
1				
2				
3				
4				
5				
6				
7				
8				

ScienceDocs Commercialization Strategy Support

ScienceDocs helps scientific startups, university-linked ventures, and innovation-focused organizations move from technical progress toward commercialization readiness. Our work can support grant strategy, SBIR/STTR planning, customer discovery, commercialization roadmaps, AI adoption, optimization engineering, and broader change management needs.

Use this template as a starting point for internal planning. For organizations preparing for funding, partnerships, investor conversations, licensing, AI-enabled product development, or operational growth, ScienceDocs can help interpret the results and convert the strategy into a practical next-step plan.

Ready to get started? Contact ScienceDocs HERE.