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Research • Funding • AI Strategy • Est. 2004

Evidence Planning Worksheet

A practical worksheet for commercialization teams, SBIR/STTR companies, university spinouts, AI/technology ventures, and life science innovators to map the evidence needed to support claims, funding applications, pilots, regulatory planning, reimbursement assumptions, and market adoption.

How to use this worksheet

Use this tool to connect evidence to specific decisions. Start with the claims or assumptions your team needs to support, then identify the evidence already available, the evidence still missing, the method for collecting it, and the next action required. This worksheet is useful before grant submission, investor outreach, pilot launch, regulatory discussions, or go-to-market planning.

1. Project and Decision Context

Field	Response
Project, product, technology, or program name	
Organization / team	
Primary use case or commercialization opportunity	
Current development stage	☐ Concept ☐ Prototype ☐ Bench/technical testing ☐ Pilot planning ☐ Active pilot ☐ Early customer use ☐ Scale-up
Primary decision this evidence plan should support	☐ Funding application ☐ Investor readiness ☐ Regulatory pathway ☐ Pilot approval ☐ Partner/customer decision ☐ Reimbursement planning ☐ Launch readiness ☐ Other: _____
Decision deadline or target milestone	

2. Claims, Assumptions, and Evidence Needs

List the claims or assumptions that must be supported before the team can credibly move forward. Be specific: vague claims are difficult to validate.

Claim / Assumption	Why It Matters	Current Evidence	Evidence Gap	Priority
Example: Target users experience this problem frequently enough to justify adoption.	Supports market need and customer discovery.			☐ High ☐ Med ☐ Low
Example: The technology performs better than current alternatives on a meaningful metric.	Supports differentiation and funding/investor claims.			☐ High ☐ Med ☐ Low
Example: A pilot partner can implement the solution without major workflow disruption.	Supports pilot readiness and adoption planning.			☐ High ☐ Med ☐ Low
				☐ High ☐ Med ☐ Low
				☐ High ☐ Med ☐ Low
				☐ High ☐ Med ☐ Low

3. Evidence Categories Checklist

Area	Evidence Planning Item	Prompt / Decision Question	Status	Notes / Owner
Problem	Evidence shows the problem is real and consequential.	Do interviews, literature, operational data, or customer complaints show the problem matters?	☐ Complete ☐ Partial ☐ Not Started	
User / Customer	Evidence identifies the affected user, buyer, decision-maker, or beneficiary.	Who has the problem, who pays, and who influences adoption?	☐ Complete ☐ Partial ☐ Not Started	
Technical	Evidence supports scientific or technical feasibility.	What data show the underlying method, model, device, product, or workflow can work?	☐ Complete ☐ Partial ☐ Not Started	
Performance	Evidence supports expected performance relative to alternatives.	What benchmark, validation, comparison, or outcome data are needed?	☐ Complete ☐ Partial ☐ Not Started	
Market	Evidence supports market size, demand, urgency, and willingness to engage.	What signals show that the market is reachable and interested?	☐ Complete ☐ Partial ☐ Not Started	
Regulatory	Evidence needs are connected to intended use, claims, risk, and pathway.	What evidence would regulators, counsel, or quality experts expect?	☐ Complete ☐ Partial ☐ Not Started	
Reimbursement	Evidence supports payment, coverage, cost savings, or economic value.	What assumptions must be tested with payers, providers, customers, or budgets?	☐ Complete ☐ Partial ☐ Not Started	
Pilot	Evidence supports pilot design, success criteria, and feasibility.	What must be proven before a pilot partner says yes?	☐ Complete ☐ Partial ☐ Not Started	
Adoption	Evidence addresses workflow fit, training, change impact, and implementation risk.	What evidence will convince users that the solution can fit into real work?	☐ Complete ☐ Partial ☐ Not Started	
Business	Evidence supports revenue model, pricing, sales cycle, and partner strategy.	What proof points are needed for customers, partners, investors, or funders?	☐ Complete ☐ Partial ☐ Not Started	

4. Evidence Source Inventory

Use this section to separate evidence you already have from evidence that still needs to be collected or validated.

Evidence Source	What It Shows	Quality / Strength	Limitations	Where Stored / Owner
Scientific literature / prior studies		☐ Strong ☐ Moderate ☐ Weak		
Internal technical data / bench testing		☐ Strong ☐ Moderate ☐ Weak		
Prototype tests or demonstrations		☐ Strong ☐ Moderate ☐ Weak		
Customer discovery interviews		☐ Strong ☐ Moderate ☐ Weak		
Market reports / secondary research		☐ Strong ☐ Moderate ☐ Weak		
Pilot or field data		☐ Strong ☐ Moderate ☐ Weak		
Regulatory guidance / predicate or comparable product research		☐ Strong ☐ Moderate ☐ Weak		
Economic, reimbursement, or ROI data		☐ Strong ☐ Moderate ☐ Weak		
Partner/customer letters, LOIs, or commitments		☐ Strong ☐ Moderate ☐ Weak		

5. Evidence Gap Prioritization

Evidence Gap	Decision It Blocks	Risk if Unresolved	Collection Method	Owner	Target Date
	☐ Funding ☐ Pilot ☐ Regulatory ☐ Investor ☐ Partner ☐ Launch	☐ High ☐ Med ☐ Low			
	☐ Funding ☐ Pilot ☐ Regulatory ☐ Investor ☐ Partner ☐ Launch	☐ High ☐ Med ☐ Low			
	☐ Funding ☐ Pilot ☐ Regulatory ☐ Investor ☐ Partner ☐ Launch	☐ High ☐ Med ☐ Low			
	☐ Funding ☐ Pilot ☐ Regulatory ☐ Investor ☐ Partner ☐ Launch	☐ High ☐ Med ☐ Low			
	☐ Funding ☐ Pilot ☐ Regulatory ☐ Investor ☐ Partner ☐ Launch	☐ High ☐ Med ☐ Low			

6. Study, Interview, or Pilot Evidence Plan

For each priority gap, define a practical evidence activity. The activity may be a study, interview series, pilot, literature review, technical test, market validation activity, reimbursement analysis, or partner discovery process.

Evidence Activity	Question to Answer	Method / Sample	Success Criteria	Output / Deliverable
Customer or stakeholder interview series		Target number / type of interviews: _____		
Technical performance test		Test design / benchmark: _____		
Pilot or field evaluation		Pilot site / workflow / users: _____		
Regulatory or reimbursement research		Sources / advisors / guidance to review: _____		
Economic value or ROI analysis		Data needed / assumptions to test: _____		

7. Evidence-to-Claim Traceability Matrix

Use this matrix to avoid unsupported claims in proposals, websites, pitch decks, commercialization plans, and pilot materials.

Proposed Claim or Message	Supporting Evidence	Evidence Strength	Allowed Use Now?	Revision Needed
		☐ Strong ☐ Moderate ☐ Weak	☐ Yes ☐ With caution ☐ No	
		☐ Strong ☐ Moderate ☐ Weak	☐ Yes ☐ With caution ☐ No	
		☐ Strong ☐ Moderate ☐ Weak	☐ Yes ☐ With caution ☐ No	
		☐ Strong ☐ Moderate ☐ Weak	☐ Yes ☐ With caution ☐ No	
		☐ Strong ☐ Moderate ☐ Weak	☐ Yes ☐ With caution ☐ No	

8. Evidence Quality and Credibility Review

Review Question	Rating	Notes / Improvement Needed
Is the evidence directly tied to the claim or decision being made?	☐ Strong ☐ Adequate ☐ Weak	
Is the evidence recent, relevant, and from a credible source?	☐ Strong ☐ Adequate ☐ Weak	
Is the sample, test setting, or comparison appropriate?	☐ Strong ☐ Adequate ☐ Weak	
Are limitations, uncertainties, and assumptions clearly stated?	☐ Strong ☐ Adequate ☐ Weak	
Would the evidence be persuasive to the intended audience?	☐ Strong ☐ Adequate ☐ Weak	
Does the evidence create any regulatory, legal, privacy, or ethical concerns?	☐ No concern ☐ Possible concern ☐ Needs review	

9. Next-Step Action Plan

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Action Item	Evidence Gap Addressed	Owner	Due Date	Dependency / Support Needed

ScienceDocs support

Need help applying this tool? ScienceDocs supports commercialization, change management, AI adoption, grant strategy, regulatory writing, evidence planning, and operational optimization for scientific teams, startups, university spinouts, and technology organizations.