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# Grant-to-Market Transition Checklist

*A practical planning worksheet for turning grant-funded research, SBIR/STTR projects, university innovations, and technical work plans into market-facing evidence, commercialization milestones, and customer-ready next steps.*

**Purpose**

Use this checklist when a project is moving from proposal language, technical aims, or funded research tasks into a commercialization pathway. The goal is to translate grant deliverables into customer evidence, product decisions, stakeholder commitments, market milestones, and a credible next funding or launch plan.

## 1. Project Transition Snapshot

| | | | |
|---|---|---|---|
| **Project / Technology Name** | | **Prepared By** | |
| **Organization / Team** | | **Date** | |
| **Grant / Funding Source** | ☐ SBIR ☐ STTR ☐ NIH ☐ NSF ☐ DoD ☐ DOE ☐ Foundation ☐ Other | **Award / Proposal Stage** | ☐ Pre-award ☐ Phase I ☐ Phase II ☐ Other |
| **Primary Technical Aim** | | **Primary Commercial Goal** | |
| **Current TRL / Maturity** | ☐ Concept ☐ Prototype ☐ Lab validation ☐ Field test ☐ Pilot-ready | **Target Market Segment** | |
| **Primary User** | | **Primary Buyer / Payer** | |
| **Near-Term Decision** | ☐ Continue R&D ☐ Prepare Phase II ☐ Pilot ☐ License ☐ Raise capital ☐ Launch | **Decision Deadline** | |
| **Commercialization Lead** | | **Technical Lead** | |

## 2. Grant Deliverables to Market Translation

Use this section to convert grant aims, milestones, and deliverables into market-facing outcomes. For each funded activity, identify what it proves to customers, partners, investors, regulators, or commercialization reviewers.

| Grant Aim / Deliverable | Technical Output | Market-Facing Evidence | Who Cares? | Next Use |
|---|---|---|---|---|
| Example: Prototype algorithm | Working model tested on sample data | Performance evidence and use case demonstration | Customer, partner, investor | Pilot discussion / Phase II |
| | | | | |
| | | | | |
| | | | | |
| | | | | |

## 3. Transition Readiness Checklist

| Done? | Transition Item | Owner | Evidence / Notes |
|---|---|---|---|
| ☐ | The team can explain the difference between technical success and commercial success for this project. | | |
| ☐ | Each major grant aim has been mapped to a commercialization implication or market-facing proof point. | | |
| ☐ | The primary customer problem is stated in plain language, not just scientific or technical language. | | |
| ☐ | The target user, buyer, payer, partner, or licensing decision-maker has been identified. | | |
| ☐ | The team has documented current alternatives, substitutes, workarounds, and competing solutions. | | |
| ☐ | The project has early evidence that the problem matters enough to justify time, budget, adoption, or procurement. | | |

| Done? | Transition Item | Owner | Evidence / Notes |
|---|---|---|---|
| ☐ | Technical milestones are aligned with future customer discovery, pilot, regulatory, reimbursement, or investment needs. | | |
| ☐ | The team has identified what evidence must be produced before the next major funding or commercialization decision. | | |
| ☐ | Key commercialization risks are visible and assigned to owners. | | |
| ☐ | A transition plan exists for moving from grant tasks to pilot, license, partnership, investment, or launch activities. | | |

## 4. Evidence Package Builder

Summarize the evidence that can be reused in SBIR/STTR commercialization plans, investor materials, licensing conversations, customer discovery, partner outreach, pilot proposals, and internal decision-making.

| Evidence Category | Current Evidence / Source | Gap or Weakness | Priority |
|---|---|---|---|
| **Technical feasibility** | | | ☐ High ☐ Med ☐ Low |
| **Customer / stakeholder need** | | | ☐ High ☐ Med ☐ Low |
| **Market size / segment logic** | | | ☐ High ☐ Med ☐ Low |
| **Competitive differentiation** | | | ☐ High ☐ Med ☐ Low |
| **Regulatory / compliance path** | | | ☐ High ☐ Med ☐ Low |
| **Business model / pricing** | | | ☐ High ☐ Med ☐ Low |
| **Pilot or partner interest** | | | ☐ High ☐ Med ☐ Low |

## 5. Stakeholder and Market Transition Map

| Stakeholder | Role | What They Need to Believe | Evidence Needed | Next Contact / Action |
|---|---|---|---|---|
| **End user** | | | | |
| **Economic buyer / payer** | | | | |
| **Technical evaluator** | | | | |
| **Pilot site / partner** | | | | |
| **Investor / funder** | | | | |
| **Regulator / compliance stakeholder** | | | | |

## 6. Commercialization Pathway Fit

| Pathway | What It Would Require | Fit | Notes |
|---|---|---|---|
| **Follow-on grant funding** | Phase II, Phase IIB, translational award, foundation grant, or agency-specific supplement. | ☐ Strong ☐ Possible ☐ Weak | |
| **TABA or commercialization support** | Market research, IP strategy, regulatory planning, investor readiness, partnership development, or customer discovery. | ☐ Strong ☐ Possible ☐ Weak | |
| **University licensing or spinout** | Technology transfer pathway, license option, startup formation, or sponsored research alignment. | ☐ Strong ☐ Possible ☐ Weak | |
| **Pilot / demonstration project** | Real-world test with a customer, partner, clinical site, operational unit, or agency stakeholder. | ☐ Strong ☐ Possible ☐ Weak | |
| **Strategic partnership** | Commercial partner, channel partner, co-development partner, manufacturer, distributor, or integrator. | ☐ Strong ☐ Possible ☐ Weak | |
| **Private capital / investment** | Angel, seed, venture, strategic investor, or non-dilutive-to-dilutive transition. | ☐ Strong ☐ Possible ☐ Weak | |
| **Direct service or product launch** | Initial paid offering, beta launch, early adopter package, or limited commercial release. | ☐ Strong ☐ Possible ☐ Weak | |

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## 7. Commercialization Risk Register

| Risk Area | Specific Risk | Likelihood | Impact | Mitigation Step | Owner |
|---|---|---|---|---|---|
| **Customer need** | | L/M/H | L/M/H | | |
| **Technical validation** | | L/M/H | L/M/H | | |
| **Regulatory / compliance** | | L/M/H | L/M/H | | |
| **Market access / reimbursement** | | L/M/H | L/M/H | | |
| **Business model / pricing** | | L/M/H | L/M/H | | |
| **Team / execution capacity** | | L/M/H | L/M/H | | |

## 8. 30-60-90 Day Grant-to-Market Action Plan

| Timeframe | Action | Owner | Due Date | Output / Decision |
|---|---|---|---|---|
| **30 days** | Convert grant aims into market-facing evidence statements. | | | |
| **30 days** | Identify 5-10 customer, partner, or stakeholder conversations to pursue. | | | |
| **60 days** | Update commercialization narrative, use case, and pathway assumptions. | | | |
| **60 days** | Define pilot, TABA, Phase II, licensing, or partner next steps. | | | |
| **90 days** | Prepare evidence package for funding, investor, licensing, or pilot conversations. | | | |
| **90 days** | Make continue / pivot / pause / partner decision based on evidence. | | | |
| **Custom** | | | | |

## 9. Transition Decision Summary

| | |
|---|---|
| **Recommended Next Step** | ☐ Continue technical development ☐ Conduct customer discovery ☐ Prepare Phase II ☐ Prepare pilot ☐ Seek licensing/partner ☐ Raise capital ☐ Pause/pivot |
| **Top Three Evidence Gaps** | 1.<br>2.<br>3. |
| **Top Three Commercialization Actions** | 1.<br>2.<br>3. |
| **Decision Owner(s)** | |
| **Review Date** | |
| **Notes** | |

### ScienceDocs Support

Need help applying this tool? ScienceDocs supports commercialization, change management, AI adoption, grant strategy, and operational optimization. We help teams translate research and grant-funded work into fundable, pilot-ready, market-facing strategies.