# Grant-to-Market Transition Checklist

A practical tool for connecting grant-funded milestones to commercialization, customer validation, investor readiness, and market execution.

**Purpose**

Use this checklist when a startup, research team, or innovation program is moving from grant-supported development into a market-facing phase. The tool helps teams connect technical progress to customer value, regulatory confidence, operational readiness, future funding, and commercial strategy.

## How to Use This Checklist

Grant funding can support important scientific and technical progress, but grant success does not automatically create market readiness. Teams should periodically step back and ask whether the funded work is producing the evidence, relationships, operational systems, and commercialization pathway needed for adoption, revenue, partnership, or investment.

- Complete the checklist near the beginning, midpoint, and final months of a grant-funded project.
- Use the evidence columns to document what has actually been validated, not only what is planned.
- Identify the gaps that could block customer adoption, investor confidence, regulatory progress, or follow-on funding.
- Translate the highest-priority gaps into a 90-day transition action plan.
- Use the final scorecard to decide whether to proceed, refine, delay, or seek additional validation before scaling.

### Project Profile

| Item | Response / Notes |
|---|---|
| **Company / organization** | |
| **Technology, product, or service** | |
| **Grant or funding mechanism** | |
| **Current project phase** | |
| **Primary technical milestone** | |
| **Target customer or user segment** | |
| **Primary commercialization goal** | |
| **Key decision date or deadline** | |

## Technical and Grant Milestone Alignment

| Done | Checklist Item | Evidence / Notes | Owner / Date |
|---|---|---|---|
| ☐ | Grant aims and technical milestones are clearly mapped to commercialization objectives. | | |
| ☐ | The team can explain which grant deliverables create market-relevant evidence. | | |
| ☐ | Technical progress is documented in a format that can support customers, partners, investors, or regulators. | | |
| ☐ | There is a clear plan for what happens after the current grant period ends. | | |
| ☐ | Unresolved technical risks have been prioritized by their effect on market transition. | | |
| ☐ | The team has identified which milestones are required before pilots, sales, licensing, or investment discussions. | | |

## Market and Customer Validation

| Done | Checklist Item | Evidence / Notes | Owner / Date |
|---|---|---|---|
| ☐ | Target customer segments are clearly defined and prioritized. | | |
| ☐ | Customer discovery interviews or market validation activities have been completed or scheduled. | | |
| ☐ | The team understands the customer problem, current alternatives, and willingness to adopt a new solution. | | |
| ☐ | The value proposition is stated in customer-facing language rather than only technical language. | | |
| ☐ | Adoption barriers such as workflow disruption, training, cost, trust, and procurement have been identified. | | |
| ☐ | The team has a plan for pilots, demonstrations, beta users, early adopters, or reference customers. | | |

## Competitive Positioning and Differentiation

| Done | Checklist Item | Evidence / Notes | Owner / Date |
|---|---|---|---|
| ☐ | The team has identified direct and indirect competitors or substitutes. | | |
| ☐ | The proposed solution has a clear differentiation strategy based on evidence, performance, cost, access, usability, or outcomes. | | |
| ☐ | Market claims are supported by data, customer feedback, or credible technical rationale. | | |
| ☐ | The team can explain why now is the right time for adoption. | | |
| ☐ | Competitive risks have been considered in grant strategy, investor materials, and commercialization planning. | | |
| ☐ | The market narrative connects technical innovation to practical customer or organizational value. | | |

## Regulatory, Compliance, and Quality Readiness

| Done | Checklist Item | Evidence / Notes | Owner / Date |
|---|---|---|---|
| ☐ | Relevant regulatory, privacy, security, quality, or compliance issues have been identified. | | |
| ☐ | If applicable, the team has considered FDA, IRB, HIPAA, data security, human subjects, export control, or contracting requirements. | | |
| ☐ | The team knows what evidence or documentation may be required before pilots, clinical work, government use, or commercial deployment. | | |
| ☐ | There is a process for managing customer, patient, user, or partner data responsibly. | | |
| ☐ | Compliance risks are not being left until the final stage of commercialization. | | |
| ☐ | Quality, safety, and documentation expectations are aligned with the intended market. | | |

## IP, Licensing, and Partnership Pathway

| Done | Checklist Item | Evidence / Notes | Owner / Date |
|---|---|---|---|
| ☐ | Ownership of the technology, data, software, invention, or intellectual property is understood. | | |
| ☐ | Licensing obligations, university ownership, subcontractor rights, or partner restrictions have been reviewed where applicable. | | |
| ☐ | The team has identified whether IP protection, licensing, freedom-to-operate review, or patent strategy is needed. | | |
| ☐ | Potential partners, licensees, strategic customers, or commercialization collaborators have been identified. | | |
| ☐ | The organization can explain how the technology will move from protected innovation to practical market use. | | |
| ☐ | IP or partnership issues are aligned with grant reporting, investor communication, and commercialization timelines. | | |

## Operational and Team Readiness

| Done | Checklist Item | Evidence / Notes | Owner / Date |
|---|---|---|---|
| ☐ | The team has assigned owners for technical, commercial, regulatory, financial, and operational workstreams. | | |
| ☐ | Internal roles are clear enough to support execution beyond the grant-funded research plan. | | |
| ☐ | The organization has identified the staffing, consultant, manufacturing, software, data, or implementation resources needed next. | | |
| ☐ | A workflow exists for tracking milestones, risks, decisions, and customer or partner follow-up. | | |
| ☐ | The company has a realistic budget for market transition activities after the current grant period. | | |
| ☐ | Leadership has agreed on the next-stage commercialization priorities. | | |

### Funding, Investor, and Revenue Pathway

| Done | Checklist Item | Evidence / Notes | Owner / Date |
|---|---|---|---|
| ☐ | The team understands how the current grant fits into a broader funding roadmap. | | |
| ☐ | Follow-on funding options have been identified, such as SBIR/STTR Phase II, translational grants, strategic partnerships, pilots, contracts, revenue, or investment. | | |
| ☐ | Investor or partner materials connect technical milestones to market opportunity and business model logic. | | |
| ☐ | The organization can explain how customer validation affects pricing, revenue, or partnership strategy. | | |
| ☐ | The team has identified the evidence needed to support investor confidence or follow-on grant competitiveness. | | |
| ☐ | The transition plan distinguishes between technical success, fundability, and commercial readiness. | | |

## Grant-to-Market Transition Snapshot

Use this summary to connect the grant-funded work to the organization's market-facing plan. The strongest transition plans show a clear line from technical milestones to evidence, customer value, operational readiness, and the next funding or revenue step.

| Grant Milestone | Market Evidence Created | Customer / User Impact | Next Commercial Step | Risk / Gap |
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## Transition Readiness Scorecard

Score each area from 1 to 5. A score of 1 indicates the area is unclear or not ready. A score of 5 indicates the area is well supported by evidence, documentation, and ownership.

| Readiness Area | Score 1-5 | Evidence | Next Action |
|---|---|---|---|
| Technical milestone clarity | | | |
| Customer problem and market evidence | | | |
| Competitive and differentiation strategy | | | |
| Regulatory, compliance, or quality readiness | | | |
| IP, licensing, and ownership clarity | | | |
| Operational capacity and team ownership | | | |
| Funding, investor, or partnership pathway | | | |
| Metrics and commercialization decision points | | | |

## 90-Day Transition Action Plan

Use this action plan to turn the checklist findings into practical next steps. Focus first on gaps that affect fundability, customer validation, regulatory or compliance confidence, and the ability to move from grant performance into market execution.

| Priority Gap | Action Needed | Owner | Target Date | Success Measure |
|---|---|---|---|---|
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## Decision Guidance

Use the checklist results to decide the most appropriate next step. A strong grant-to-market transition plan does not require every risk to be eliminated, but it should show that the team understands the market, customer, operational, funding, and implementation issues that will determine whether the innovation can move forward.

- Proceed toward pilots, partnerships, follow-on funding, or investor outreach if the technical evidence, customer need, ownership pathway, and next-stage plan are clear.
- Refine the commercialization plan if the technology is progressing but the customer segment, use case, adoption pathway, or business model remains uncertain.
- Delay broader market activity if compliance, IP, operational capacity, or evidence gaps could undermine credibility with customers, funders, partners, or investors.
- Use the 90-day action plan to close the highest-risk gaps before committing major resources to scaling.

### ScienceDocs Support

ScienceDocs helps startups, research teams, and innovation-driven organizations connect grant-funded progress to commercialization strategy, customer discovery, investor readiness, AI adoption, and operational growth. Ready to move from grant milestones to market execution? Contact ScienceDocs to discuss commercialization and change management support for your team.