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Growth Planning Worksheet

A practical ScienceDocs worksheet for converting early commercialization traction into focused, measurable, and operationally realistic growth priorities.

How to use this tool: Use this worksheet when a startup, university spinout, commercialization team, AI/technology organization, or operationally intensive company has early evidence of demand and needs to decide where to focus growth resources. The goal is not to list every possible opportunity. The goal is to select a small number of growth priorities that are supported by evidence, market access, operational capacity, funding logic, and measurable next steps.

1. Growth Planning Snapshot

Field	Response
Organization / project	
Product, service, technology, or program	
Current stage	Pre-launch / pilot / early customers / grant-funded transition / post-launch / scaling / other
Primary growth planning owner	
Planning period	Next 90 days / next 6 months / next 12 months / other
Current growth question	Example: Which segment should we pursue first? Which channel is worth investing in? What must be built before scaling?
Desired growth outcome	
Main constraint	Funding / team capacity / evidence / sales access / regulatory path / operations / partner dependency / other

2. Current Traction and Evidence Review

Evidence category	What do we have now?	Strength of evidence	Notes / gaps
Customer/user interviews or discovery conversations		Weak / Moderate / Strong	
Pilot use, demos, prototypes, or technical validation		Weak / Moderate / Strong	
Letters of support, LOIs, partner interest, or referrals		Weak / Moderate / Strong	
Revenue, contracts, subscriptions, paid pilots, or procurement movement		Weak / Moderate / Strong	
Grant, investor, or strategic partner validation		Weak / Moderate / Strong	
Operational, clinical, scientific, workflow, or cost-saving evidence		Weak / Moderate / Strong	
Competitive or market differentiation evidence		Weak / Moderate / Strong	

Planning note: Growth planning should be anchored in observable evidence. If evidence is weak, the next growth objective may be validation rather than sales expansion.

3. Growth Objective Selection

Potential growth objective	Why it matters	Evidence supporting it	Priority
Acquire first customers or paying users			High / Med / Low
Expand pilot activity into measurable case studies			High / Med / Low
Increase referrals, partner introductions, or channel access			High / Med / Low
Move from grant-funded development to commercial revenue			High / Med / Low
Strengthen investor, SBIR/STTR, or strategic funding readiness			High / Med / Low
Improve onboarding, implementation, training, or adoption			High / Med / Low
Prepare operations, staffing, data systems, or delivery model for scale			High / Med / Low
Enter a new segment, institution type, geography, or vertical market			High / Med / Low

4. Target Segment and Use Case Focus

Candidate segment / use case	User or buyer	Problem intensity	Access path	Fit score 1-5
Segment / use case 1		Low / Med / High		
Segment / use case 2		Low / Med / High		
Segment / use case 3		Low / Med / High		
Segment / use case 4		Low / Med / High		
Segment / use case 5		Low / Med / High		

5. Growth Pathway Options

Growth pathway	Best fit when...	Key requirements	Selected?
Direct customer growth	The team can identify and reach buyers directly.	Clear buyer profile, outreach process, sales materials, follow-up cadence, and value proposition.	Yes / No
Pilot-to-commercial conversion	Pilot users or sites show evidence of value but have not converted into paid use.	Pilot outcomes, pricing path, decision-maker access, implementation plan, and procurement pathway.	Yes / No
Partner-led growth	Partners can provide market access, implementation capacity, referrals, or credibility.	Partner scorecard, enablement materials, role clarity, shared metrics, and governance.	Yes / No
Grant-to-market transition	Non-dilutive funding has supported development but commercial pathway needs structure.	Commercialization plan, market evidence, milestones, budget logic, and post-award execution plan.	Yes / No
Investor-backed scaling	A larger market opportunity and growth plan justify outside capital.	Investor narrative, traction metrics, unit economics, roadmap, use of funds, and risk mitigation.	Yes / No
Operational scaling	Demand exists but delivery, staffing, technology, or workflow capacity limits expansion.	Capacity model, workflow redesign, KPI dashboard, training plan, and implementation roadmap.	Yes / No

6. Growth Constraint Analysis

Constraint area	Current issue	Severity	Action needed
Market clarity		Low / Med / High	
Customer access or sales process		Low / Med / High	
Product readiness or technical maturity		Low / Med / High	
Implementation, onboarding, or training capacity		Low / Med / High	
Evidence, outcomes, or proof points		Low / Med / High	
Funding, budget, or cash runway		Low / Med / High	
Regulatory, reimbursement, procurement, or compliance path		Low / Med / High	
Operations, staffing, data systems, or delivery model		Low / Med / High	

7. Growth Metrics and Targets

Metric	Baseline	90-day target	6-month target	Data source	Owner
Qualified leads, introductions, or opportunities					
Customer discovery or buyer conversations completed					
Pilots, demos, trials, or implementation sites					
Revenue, contracts, paid pilots, or LOIs					
Case studies, outcome evidence, testimonials, or validation findings					
Conversion rate from outreach to meeting / pilot / sale					
Operational capacity: customers supported, sites served, delivery time, or implementation throughput					
Funding readiness: proposal, investor deck, budget, or partner package progress					

8. Resource and Capacity Planning

Resource category	Needed for growth?	Current capacity	Gap / risk	Decision or next step
Leadership time and decision-making support	Yes / No			
Sales, outreach, or business development support	Yes / No			
Technical/product development support	Yes / No			
Implementation, onboarding, training, or customer success support	Yes / No			
Data, security, compliance, or regulatory expertise	Yes / No			
Grant, investor, or commercialization strategy support	Yes / No			
Operational systems, dashboards, CRM, documentation, or workflow tools	Yes / No			

9. Growth Risk Register

Risk	Likelihood	Impact	Mitigation	Owner
Growth target is not tied to strong customer or market evidence	Low / Med / High	Low / Med / High		
Team pursues too many segments or channels at once	Low / Med / High	Low / Med / High		
Product, implementation, or support capacity cannot keep up	Low / Med / High	Low / Med / High		
Funding runway or budget is insufficient for selected growth path	Low / Med / High	Low / Med / High		
Partner, channel, procurement, regulatory, or reimbursement path is slower than expected	Low / Med / High	Low / Med / High		
Evidence is not compelling enough for customers, investors, funders, or partners	Low / Med / High	Low / Med / High		

10. Growth Planning Checklist

Done?	Growth planning item	Notes / evidence	Owner
[ ]	Confirm the primary growth objective for the next planning period.		
[ ]	Select no more than two priority market segments, user groups, or buyer types.		
[ ]	Identify the strongest evidence supporting the selected growth direction.		
[ ]	Clarify whether the next phase is validation, launch, revenue growth, partnership development, operational scaling, or fundraising support.		
[ ]	Define measurable 90-day and 6-month targets.		
[ ]	Identify the largest operational, technical, funding, evidence, or adoption constraint.		
[ ]	Assign owners for outreach, evidence collection, product readiness, implementation, and partner/funder communication.		
[ ]	Create a review cadence for tracking progress and deciding whether to continue, pivot, pause, or scale.		

11. 30-60-90 Day Growth Action Plan

Timeframe	Priority actions	Owner	Success evidence
Next 30 days			
31-60 days			
61-90 days			
Decision checkpoint	Decide whether to expand, maintain, redesign, narrow focus, seek funding, or pause.		

12. Growth Planning Notes

Topic	Notes
Key assumptions to validate	
Customer/user questions to answer	
Partner or stakeholder questions to answer	
Evidence needed before major investment	
Internal decisions needed	
Follow-up commitments	

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