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COMMERCIALIZATION RESOURCE HUB

Idea Exploration Checklist

A practical planning tool for moving from a promising research result, invention, technical capability, or early concept toward a clearer understanding of the problem, stakeholders, assumptions, landscape, proof points, and next learning step.

How to use this checklist

- Work through the sections in order, but do not wait for perfect information.
- Use the blank fields to record what is known, what is assumed, and what must be learned before validation, funding, pilots, or commercialization planning.
- The most valuable output is often the gap list: the questions that need external evidence before the team invests heavily in development.

Project Snapshot

Project / idea name	
Team / owner	
Date / version	
Research result, invention, or technical capability	
Target setting or context	
One-sentence opportunity hypothesis	
Immediate decision this checklist should support	

Five discovery goals

1	**Clarify the problem**	Define the pain point, setting, and why it matters before shaping the solution.
2	**Identify stakeholders**	Clarify who experiences the problem, who pays, who approves, and who influences adoption.
3	**Scan the landscape**	Review current solutions, substitutes, funded work, publications, and workarounds.
4	**Surface assumptions**	Make user, buyer, value, adoption, feasibility, and implementation assumptions explicit.
5	**Define first proof points**	Choose the smallest evidence-generating steps that would make the concept more credible.

1	**Problem clarity** Clarify the pain point before shaping the solution.

[ ] The problem is written in plain language.
[ ] The affected user, setting, or workflow is specific.
[ ] The impact is described: cost, delay, risk, error, unmet need, burden, or missed outcome.
[ ] How the problem is currently handled, avoided, or tolerated is documented.
[ ] The problem statement is distinct from the proposed solution.
[ ] The team can explain why solving this now matters.

Problem statement draft

Who has the problem?	
What happens today?	
Why does it matter?	
How do current approaches fall short?	

2	**Stakeholder context** Map who experiences, influences, funds, approves, or implements a potential solution.

[ ] Direct users or operators are identified.
[ ] Beneficiaries or affected populations are identified.
[ ] Buyers, payers, funders, or economic decision-makers are identified.
[ ] Approvers, gatekeepers, compliance stakeholders, or institutional decision-makers are identified.
[ ] Implementation partners, workflow owners, or technical integration stakeholders are identified.
[ ] At least one possible stakeholder conversation is listed.

Stakeholder map

Stakeholder group	What they care about	Evidence, contact, or next question

3	**Landscape scan** Identify current approaches, substitutes, funded work, publications, and gaps.

- [ ] Existing products, services, tools, or practices have been reviewed.
- [ ] Manual workarounds, informal processes, or tolerated pain points are documented.
- [ ] Relevant publications, research groups, datasets, or technical precedents are noted.
- [ ] Funded projects, agency priorities, or commercialization precedents are scanned.
- [ ] Intellectual property, licensing, or freedom-to-operate questions are flagged for follow-up.
- [ ] The concept's potential differentiation and the biggest landscape uncertainties are summarized.

Landscape findings

Source or solution	What it does	Gap or limitation	Implication for our idea

4	**Concept assessment and assumptions** Separate scientific or technical strength from commercial relevance.

- [ ] Initial technical feasibility evidence is described.
- [ ] The most likely first use case is narrowed to one or two settings.
- [ ] Dependencies are identified: data, materials, equipment, partners, approvals, systems, or workflows.
- [ ] Constraints are flagged: cost, privacy/security, regulatory path, training, procurement, or implementation burden.
- [ ] Scientific novelty is separated from real-world need, adoption, and value.

Assumptions to test

Assumption	Why it matters	How to test it	Priority

5 Early evidence and proof points

Define what would make the concept more credible and worth validating.

- [ ] Existing evidence is listed: data, prototype results, publications, user observations, partner feedback, or institutional demand.
- [ ] The team knows which evidence would make the idea more credible to users, funders, partners, or reviewers.
- [ ] The smallest next proof point is defined before a larger build, pilot, or funding push.
- [ ] A success signal or metric is attached to the proof point.
- [ ] A decision rule is defined: continue, revise, pause, or gather different evidence.

Evidence plan

Evidence or proof point	Source or method	What it would show	Next decision

6 Next learning step

Choose a practical, time-bounded action that reduces uncertainty.

- [ ] 3-5 stakeholder interviews
- [ ] Quick competitor, substitute, or publication scan
- [ ] Technical feasibility mini-experiment
- [ ] Workflow observation or journey map
- [ ] Funding, partner, or commercialization fit scan
- [ ] Advisor, mentor, licensee, or collaborator feedback

Action plan

Action	Owner	Target date	Success signal	Follow-up decision

Common discovery gaps to watch for

- Problem definition is still vague.
- The team relies mainly on internal assumptions about value, adoption, or need.
- Market relevance, willingness to pay, or willingness to change behavior is unknown.
- The next interview, scan, experiment, or proof point is not specific enough.

7 Ready-to-proceed checkpoint

Use this before moving into validation, funding strategy, pilot planning, or commercialization planning.

- [ ] We can explain the problem and target stakeholder without leading with the solution.
- [ ] The strongest assumptions are visible, ranked, and tied to tests.
- [ ] At least one external evidence source or stakeholder conversation is planned or complete.
- [ ] The next step is small, testable, time-bounded, and tied to a decision; major unknowns are recorded.