SDI ScienceDocs Inc.
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Partnership Development Guide

A practical ScienceDocs planning guide for identifying, prioritizing, engaging, and managing strategic partners that can support commercialization, pilots, market access, implementation, funding, or growth.

How to use this tool: Use this guide to move from a general idea that a partnership may be helpful to a structured plan for finding the right partners, defining mutual value, managing outreach, and converting promising conversations into useful next steps. It is designed for startups, university spinouts, SBIR/STTR teams, AI and technology organizations, commercialization teams, and companies preparing for pilots, launch, or scale.

1. Partnership Objective Snapshot

Field	Response
Organization / project	
Product, technology, service, or innovation	
Partnership goal	Pilot site / channel access / customer referrals / clinical or technical evidence / licensing / implementation support / manufacturing / distribution / funding leverage / other
Current commercialization stage	Idea / validation / funding / pilot / launch / growth / scale
Primary market or stakeholder segment	
Internal partnership owner	
Target timeframe for first meaningful partner action	
Definition of a successful partnership outcome	

2. Partnership Need Clarifier

Question	Working answer
What commercialization gap are we trying to fill through a partner?	
Why can this gap not be solved as efficiently through internal work alone?	
What type of partner is most likely to help: customer, channel, university, investor-adjacent, manufacturing, technical, implementation, regulatory, payer, or distribution partner?	
What evidence, access, capability, credibility, or infrastructure do we need from the partner?	
What can we offer that would make the relationship valuable to the partner?	

3. Partner Type Selection Matrix

Partner type	Best used when...	Potential value	Watch-outs
Strategic customer or pilot site	You need real-world feedback, use cases, adoption evidence, or operational proof.	User evidence, testimonials, workflows, ROI data, implementation learning.	Pilot scope creep, unpaid customization, unclear data rights.
Channel or distribution partner	You need access to buyers, markets, sales relationships, or procurement paths.	Faster market access, referrals, sales leverage, geographic reach.	Loss of margin, channel conflict, weak commitment.
University or research partner	You need scientific credibility, validation, technical expertise, or sponsored research support.	Evidence, publications, grant alignment, specialized facilities, talent.	Publication/IP issues, slow timelines, compliance requirements.
Implementation or systems partner	You need help deploying, integrating, training, or supporting customers.	Delivery capacity, customer success, change management support.	Quality control, handoff gaps, brand/reputation risk.
Manufacturing or supply partner	You need production, prototyping, scale-up, quality systems, or cost reduction.	Operational feasibility, capacity, cost data, production learning.	Dependence, quality issues, confidentiality risk.
Investor-adjacent or ecosystem partner	You need introductions, market credibility, accelerator support, or fundraising visibility.	Warm intros, validation, investor readiness, ecosystem access.	Misaligned expectations, too much time spent networking.

4. Ideal Partner Profile

Profile element	Preferred characteristics	Must-have?	Notes
Target industry or sector		Yes / No	

Target customer or stakeholder access		Yes / No	
Technical, clinical, regulatory, operational, or market expertise		Yes / No	
Size and stage of partner organization		Yes / No	
Geography or market reach		Yes / No	
Ability to move quickly		Yes / No	
Decision-maker accessibility		Yes / No	
Reputation, credibility, or brand value		Yes / No	
Data, infrastructure, systems, or facilities needed		Yes / No	

5. Partner Prospect List

Prospect	Partner type	Why they fit	Known contact / path in	Priority	Next step
				High / Med / Low	
				High / Med / Low	
				High / Med / Low	
				High / Med / Low	
				High / Med / Low	
				High / Med / Low	

6. Mutual Value Proposition Builder

Planning note: A partnership message should not sound like a request for help. It should show why the partner benefits from exploring the relationship.

Value question	Draft response
What important problem, market opportunity, or strategic objective does the partner care about?	
How does our solution, technology, service, dataset, expertise, or team help the partner?	
What could the partner learn, validate, sell, improve, reduce, or accelerate by working with us?	
What would be a realistic first step that does not require major commitment?	
What proof, one-pager, demo, data, pilot concept, or case example should we share first?	

7. Outreach Message Planner

Message component	Draft language / notes
Opening context	Why are you reaching out now, and why this organization?
Relevance to partner	What do you understand about their goals, market, operations, research, or customers?
Proposed value	What could a conversation help them explore or solve?
Low-friction ask	15-20 minute exploratory call / feedback on pilot concept / intro to relevant team / review of one-page summary
Follow-up asset	One-pager / short deck / pilot brief / evidence summary / commercialization roadmap

8. Partner Outreach Readiness Checklist

Done?	Partnership development item	Notes / evidence	Owner
[ ]	We can clearly explain why this partner is relevant and not simply one name on a generic list.		
[ ]	We have defined a specific low-risk first step or discussion objective.		
[ ]	We have a short, non-confidential summary that explains the opportunity in practical terms.		

[ ]	We understand the likely decision-maker, champion, gatekeeper, or functional owner.		
[ ]	We have identified the partner benefit, not only our desired outcome.		
[ ]	We have reviewed whether confidentiality, IP, regulatory, procurement, or conflict-of-interest issues could arise early.		
[ ]	We have a follow-up plan if the first contact is interested, neutral, or unresponsive.		

9. First Meeting Planning Worksheet

Planning item	Notes
Meeting objective	
People attending from our side	
People attending from partner side	
Three questions we need answered	1. 2. 3.
Three points we need to communicate	1. 2. 3.
Evidence or material to show	
Desired next step	

10. Partnership Pathway and Milestones

Stage	Purpose	Milestone / decision point	Owner	Target date
Identify	Build and qualify list of potential partners.			
Engage	Make first contact and establish relevance.			
Explore	Understand mutual value, fit, constraints, and timing.			
Define	Outline possible pilot, referral, collaboration, channel, or implementation model.			
Validate	Confirm feasibility, risks, economics, stakeholder support, and evidence needs.			
Commit	Agree on next step, responsibilities, timeline, and documentation.			
Manage	Track progress, results, communication, and relationship health.			

11. Risk and Boundary Planning

Potential issue	Boundary or mitigation plan	Owner
Confidential information or premature data sharing		
IP ownership, licensing, publication, or background rights		
Exclusivity, channel conflict, or market restriction		
Unpaid customization or excessive pilot burden		
Procurement, contracting, or compliance barriers		
Unclear decision authority or weak internal champion		
Misaligned expectations about timeline, revenue, or responsibility		

12. Follow-Up and Relationship Management Tracker

Partner	Last contact	Status	Next step	Owner	Date
		Identified / contacted / meeting scheduled / active discussion / paused / declined			
		Identified / contacted / meeting scheduled / active discussion / paused / declined			
		Identified / contacted / meeting scheduled / active discussion / paused / declined			
		Identified / contacted / meeting scheduled / active discussion / paused / declined			
		Identified / contacted / meeting scheduled / active discussion / paused / declined			

13. Action Items and Notes

Action item	Owner	Due date	Status / notes

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