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Partnership Growth Template

A practical ScienceDocs planning template for expanding an initial partnership into a structured, measurable, and sustainable commercialization growth relationship.

How to use this tool: Use this template after a partner has moved beyond the first conversation, pilot, referral, memorandum, or informal collaboration. It helps founders, university spinouts, SBIR/STTR teams, AI and technology organizations, commercialization teams, and operational improvement groups define how a partnership can grow without losing focus, ownership, or measurable value.

1. Partnership Growth Snapshot

Field	Response
Organization / project	
Partner organization	
Primary relationship owner	
Current partnership stage	Prospect / active discussion / pilot / referral relationship / reseller or channel partner / implementation partner / strategic alliance / other
Original partnership objective	
Current evidence of value	
Desired growth outcome over the next 6-12 months	
Decision needed now	Continue / expand / formalize / pause / redesign / exit

2. Current Partnership Health Check

Dimension	Score 1-5	Evidence / notes	Immediate concern?
Strategic fit with commercialization goals			Yes / No
Access to target users, buyers, decision-makers, sites, or channels			Yes / No
Mutual value and partner motivation			Yes / No
Clarity of roles, responsibilities, and decision authority			Yes / No
Evidence produced so far: pilot data, referrals, meetings, revenue, technical learning, or credibility			Yes / No
Communication cadence and responsiveness			Yes / No
Legal, IP, confidentiality, data, or compliance alignment			Yes / No
Scalability of the relationship			Yes / No

Scoring guidance: Suggested interpretation: 32-40 = strong candidate for growth; 24-31 = promising but needs structure; 16-23 = unstable or unclear; below 16 = consider redesigning or exiting before investing more time.

3. Partnership Growth Goal Definition

Growth goal category	What we want to achieve	Why it matters	Priority
More customers, users, or pilot sites			High / Med / Low
More evidence, data, case studies, or testimonials			High / Med / Low
Expanded technical, implementation, or delivery capacity			High / Med / Low
Market access, distribution, channel, or sales support			High / Med / Low
Investor, grant, or strategic credibility			High / Med / Low
Regulatory, reimbursement, procurement, or clinical/operational learning			High / Med / Low
International, regional, institutional, or sector expansion			High / Med / Low

4. Mutual Value Proposition

Question	Our organization	Partner organization
What does each side gain from expanding the relationship?		
What capabilities, access, credibility, evidence, or resources does each side contribute?		
What risks does each side take on?		
What would make the partner want to keep investing time?		
What would make the relationship unattractive or burdensome?		

5. Partnership Expansion Pathway

Expansion path	Best fit when...	Candidate actions	Selected?
Pilot-to-case-study expansion	The partnership has produced promising early evidence but needs proof for broader market use.	Add more users/sites, collect outcomes, document before/after evidence, prepare a launch evidence brief.	Yes / No
Referral or ecosystem growth	The partner can introduce credible prospects, funders, universities, buyers, or implementation sites.	Define ideal referrals, prepare partner briefing language, track introductions and conversion outcomes.	Yes / No
Channel or distribution development	The partner has market reach or customer relationships that could accelerate adoption.	Clarify territory, messaging, sales role, economics, training needs, handoff process, and qualification criteria.	Yes / No
Joint solution or implementation model	The partner complements delivery, integration, change management, or technical execution.	Define work packages, delivery roles, support model, quality standards, and escalation process.	Yes / No
Strategic alliance or formal collaboration	The relationship is important enough to require a formal structure and longer-term roadmap.	Draft objectives, governance, KPIs, confidentiality terms, decision rights, and review cadence.	Yes / No
Co-funding, grant, or sponsored project pathway	The partner improves eligibility, credibility, facilities access, evidence generation, or matching support.	Identify funding mechanisms, budget roles, deliverables, cost share, partner letter, and commercialization rationale.	Yes / No

6. Growth Milestones and Decision Gates

Milestone / gate	Target date	Evidence required	Owner	Decision
Partner alignment meeting completed				Proceed / revise / stop
Growth objective and value proposition confirmed				Proceed / revise / stop
Pilot, referral, channel, or alliance scope drafted				Proceed / revise / stop
Legal/IP/confidentiality/data issues reviewed				Proceed / revise / stop
Partner enablement materials completed				Proceed / revise / stop
First growth action completed				Proceed / revise / stop
First value review completed				Expand / maintain / redesign / exit

7. Partner Enablement Plan

Enablement item	Needed?	Who creates it?	Due date	Notes
One-page partner overview or capability brief	Yes / No			
Target customer / user profile	Yes / No			
Referral talking points or outreach language	Yes / No			
Pilot design or implementation brief	Yes / No			
Technical overview, demo script, or product requirements summary	Yes / No			
Pricing, budget, or value estimate guidance	Yes / No			
FAQ / objection handling guide	Yes / No			
Data, security, regulatory, or compliance summary	Yes / No			

8. Partnership Metrics Dashboard

Metric	Baseline	Target	Current	Evidence source	Status
Qualified introductions or referrals generated					Green / Yellow / Red
Pilot sites, users, or customer conversations generated					Green / Yellow / Red
Revenue, contracts, LOIs, or procurement progress influenced					Green / Yellow / Red
Evidence produced: case study, data, testimonial, workflow insight, or validation result					Green / Yellow / Red
Time-to-decision or time-to-implementation improvement					Green / Yellow / Red
Partner engagement level: meetings, responsiveness, executive support, follow-through					Green / Yellow / Red
Strategic credibility or market access gained					Green / Yellow / Red

9. Risk and Dependency Review

Risk / dependency	Likelihood	Impact	Mitigation / next action	Owner
Partner loses interest or deprioritizes the relationship	Low / Med / High	Low / Med / High		
Too much unpaid customization or scope expansion	Low / Med / High	Low / Med / High		
Unclear IP, data, confidentiality, or publication expectations	Low / Med / High	Low / Med / High		
Relationship depends on one champion or contact	Low / Med / High	Low / Med / High		
Partner lacks decision authority or implementation capacity	Low / Med / High	Low / Med / High		
Misaligned incentives, economics, or territory expectations	Low / Med / High	Low / Med / High		
Evidence or outcomes are too weak to support expansion	Low / Med / High	Low / Med / High		

10. Governance and Communication Cadence

Governance element	Planned approach
Primary contacts on each side	
Executive sponsor or senior reviewer	
Meeting cadence	Weekly / biweekly / monthly / quarterly / milestone-based
Decision-making process	
Shared documents or tracking system	
Escalation pathway for delays or issues	
Confidentiality, data, IP, or legal review process	
Review cadence for continuing, expanding, redesigning, or ending the partnership	

11. Partnership Growth Checklist

Done?	Growth action	Notes / evidence	Owner
[ ]	Confirm that the partner still aligns with current commercialization, launch, or growth priorities.		
[ ]	Define the specific growth pathway: referrals, pilots, channel access, implementation support, co-development, evidence generation, funding, or strategic alliance.		
[ ]	Document the value proposition for both sides in plain language.		
[ ]	Identify the partner decision-makers, champions, users, influencers, and legal/compliance reviewers.		
[ ]	Create any enablement materials the partner needs to represent the opportunity accurately.		
[ ]	Set measurable outcomes and a realistic review date.		
[ ]	Clarify IP, data, confidentiality, pricing, scope, and ownership issues before expanding activity.		
[ ]	Track partner-driven value using evidence rather than general optimism.		
[ ]	Schedule a formal partner review to decide whether to expand, maintain, redesign, or exit.		

12. 30-60-90 Day Partnership 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, pause, or exit.		

13. Notes and Working Assumptions

Topic	Notes
Assumptions to validate	
Open questions for the partner	
Open questions for internal team	
Information needed before committing more resources	
Follow-up commitments made	

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