SDI ScienceDocs Inc.
Research • Funding • AI Strategy • Est. 2004

Strategic Partner Scorecard

A practical ScienceDocs worksheet for evaluating, comparing, and prioritizing strategic partners for commercialization, pilots, market access, distribution, licensing, funding, implementation, or growth.

How to use this tool: Use this scorecard to assess whether a potential partner strengthens the path to market, improves credibility, expands access to customers or stakeholders, reduces implementation risk, or creates measurable commercial value. It is designed for startups, university spinouts, SBIR/STTR teams, technology companies, AI organizations, commercialization teams, and operating companies seeking partner-led growth.

1. Partner Opportunity Snapshot

Field	Response
Organization / team	
Potential partner name	
Partner type	Strategic customer / channel partner / implementation partner / university or research partner / investor-adjacent partner / licensing partner / manufacturing partner / other
Primary partnership objective	Market access / pilot site / distribution / technical validation / funding support / regulatory evidence / operational scale / other
Internal partnership owner	
Current relationship stage	Identified / warm contact / intro scheduled / active discussion / proposal / negotiation / existing partner
Target decision date	
Most important desired outcome	

2. Strategic Fit Screening

Screening question	Response / notes
What specific commercialization, market access, technical, operational, or credibility gap could this partner help address?	
What does the partner appear to need from us?	
Which customer, user, payer, stakeholder, investor, or institutional audience could the partner help us reach?	
Is the partner aligned with our current stage, or are they better suited for a later phase?	
What would make this relationship a clear success within 3-6 months?	

3. Partner Scoring Matrix

Scoring guidance: Score each criterion from 1 to 5. 1 = weak fit or high concern; 3 = acceptable but uncertain; 5 = strong fit with clear evidence. Add notes so the final decision is not based on numbers alone.

Criterion	Score 1-5	Evidence / rationale	Concerns or gaps	Weight
Strategic alignment with commercialization goals				High / Med / Low
Access to target customers, users, buyers, or stakeholders				High / Med / Low
Credibility, brand, technical, or institutional validation value				High / Med / Low
Ability to support pilots, implementation, or real-world evidence				High / Med / Low
Complementary capabilities, assets, data, infrastructure, or expertise				High / Med / Low
Decision speed and organizational responsiveness				High / Med / Low
Commercial upside, revenue potential, or funding leverage				High / Med / Low
Cultural fit, trust, transparency, and communication quality				High / Med / Low
Operational feasibility and resource requirements				High / Med / Low

Legal, IP, compliance, regulatory, or conflict-of-interest risk				High / Med / Low

4. Partnership Value Map

Value category	Potential value from this partner	Evidence available	How value would be measured
Customer or market access			
Pilot or implementation opportunity			
Technical validation or evidence generation			
Distribution, sales, or channel leverage			
Regulatory, reimbursement, or adoption support			
Funding, investor, or grant leverage			
Operational scale, delivery capacity, or infrastructure			

5. Mutual Benefit and Partner Motivation

Question	Working answer
Why would this partner care about the opportunity?	
What business, mission, research, operational, or strategic goal of theirs could we support?	
What internal champion would likely benefit from the partnership?	
What would the partner need to justify time, resources, or executive attention?	
What would a low-risk first step look like for them?	

6. Risk, Dependency, and Control Review

Risk / dependency	Risk level	Mitigation or decision rule	Owner
Partner controls too much of the customer relationship	High / Med / Low		
Partner could become a competitor or restrict market options	High / Med / Low		
IP, data, confidentiality, or publication concerns	High / Med / Low		
Long sales cycle, procurement delay, or unclear decision authority	High / Med / Low		
Misaligned incentives, unclear value exchange, or weak champion	High / Med / Low		
Resource burden on our team is larger than expected	High / Med / Low		

7. Due Diligence Checklist

Done?	Planning item	Notes / evidence	Owner
[ ]	We have identified the partner decision-maker, user/champion, and any gatekeepers or legal/procurement contacts.		
[ ]	We understand the partner's strategic motivation and have not assumed that our interest alone creates mutual value.		
[ ]	We have reviewed potential conflicts involving IP, exclusivity, data access, publication, regulatory claims, or confidentiality.		
[ ]	We have confirmed that the partnership can start with a focused, low-risk pilot, introduction, validation activity, or defined collaboration step.		

[ ]	We have identified the internal owner responsible for managing follow-up, documentation, and relationship momentum.		
[ ]	We have considered whether this partner is a near-term priority or a later-stage relationship to revisit after more evidence is available.		

8. Partner Comparison Table

Partner	Primary value	Total score	Top risk	Near-term action	Priority
Partner 1					High / Med / Low
Partner 2					High / Med / Low
Partner 3					High / Med / Low
Partner 4					High / Med / Low
Partner 5					High / Med / Low

9. Outreach and Engagement Plan

Step	Purpose	Message / request	Owner	Due date	Status
Warm introduction or direct outreach					
Introductory meeting					
Partner needs / fit discussion					
Exchange non-confidential overview or one-pager					
Define pilot, referral, validation, or collaboration concept					
Decide whether to proceed, pause, or revisit later					

10. Decision Summary

Decision item	Response
Overall partner priority	High / Medium / Low / Defer
Recommended next step	Proceed / explore further / request more information / pause / do not pursue
Minimum evidence needed before committing significant resources	
Key negotiation or boundary points	
Internal decision-maker	
Date for review or follow-up	

11. 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.