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Value Tracking Worksheet

Use this worksheet to define, measure, and communicate the value created by a pilot, implementation, commercialization activity, AI deployment, operational improvement, or early market launch. It is designed to help teams move beyond activity tracking and focus on evidence of adoption, outcomes, stakeholder benefit, and next-step decisions.

Best used before a pilot or launch begins, then updated at agreed checkpoints so the team can compare expected value with observed value.

1. Project or Pilot Snapshot

Project / initiative name	
Organization / team	
Primary value owner	
Pilot or tracking period	Start: _____ End: _____
Primary users / customers	
Commercialization or implementation context	☐ Early pilot ☐ Internal implementation ☐ Customer launch ☐ Partner pilot ☐ Grant-to-market transition ☐ Other: _____
Decision this worksheet should support	☐ Continue ☐ Pivot ☐ Expand ☐ Fund further ☐ Pause ☐ Prepare for external launch

2. Value Hypothesis

Write the working value hypothesis in simple terms. The goal is to clarify what should improve, for whom, and why the improvement matters.

If we implement / test...	For these users or stakeholders...	Then we expect this measurable value...

3. Baseline and Target Value

Capture the starting point before the pilot or implementation begins. If hard numbers are not available, record a reasonable estimate and flag it as an assumption.

Value area	Baseline	Target	Measurement method	Data source	Confidence
Time savings					☐ Low ☐ Med ☐ High
Cost reduction / avoided cost					☐ Low ☐ Med ☐ High
Revenue or conversion impact					☐ Low ☐ Med ☐ High
Quality / error reduction					☐ Low ☐ Med ☐ High
User satisfaction / adoption					☐ Low ☐ Med ☐ High
Operational capacity / throughput					☐ Low ☐ Med ☐ High
Risk reduction / compliance					☐ Low ☐ Med ☐ High
Strategic or partner value					☐ Low ☐ Med ☐ High

4. Value Metrics Selection

Select a small number of metrics that are credible, trackable, and relevant to the next decision. Avoid tracking everything. Prioritize metrics that connect directly to funding, adoption, customer value, commercialization, or operational performance.

Status	Value tracking item	Evidence / source	Owner / date
☐ Not started ☐ In progress ☐ Complete	Primary outcome metric is defined clearly enough that two people would measure it the same way.		
☐ Not started ☐ In progress ☐ Complete	At least one adoption or usage metric is included, not just technical performance.		
☐ Not started ☐ In progress ☐ Complete	At least one stakeholder-perceived value indicator is included, such as user satisfaction, willingness to continue, or decision-maker support.		
☐ Not started ☐ In progress ☐ Complete	Data source is available or can be collected without excessive burden.		
☐ Not started ☐ In progress ☐ Complete	Metric timing is defined, including when baseline, midpoint, and final values will be measured.		
☐ Not started ☐ In progress ☐ Complete	The team has identified which metrics will matter most to customers, funders, partners, or internal decision-makers.		

5. Core Value Tracking Table

Use this table as the central tracking log. Add rows as needed. For DOCX editing, copy and paste blank rows to expand the worksheet.

Metric / value signal	Why it matters	Baseline	Current result	Target	Evidence source	Notes / next action

6. Stakeholder Value Signals

Not all value is immediately financial. Use this section to capture qualitative evidence from users, buyers, decision-makers, partners, funders, implementation teams, and operational leaders.

Stakeholder group	Value they care about	Observed signal or quote	Strength of signal	Follow-up needed
			☐ Weak ☐ Moderate ☐ Strong	
			☐ Weak ☐ Moderate ☐ Strong	
			☐ Weak ☐ Moderate ☐ Strong	
			☐ Weak ☐ Moderate ☐ Strong	
			☐ Weak ☐ Moderate ☐ Strong	
			☐ Weak ☐ Moderate ☐ Strong	
			☐ Weak ☐ Moderate ☐ Strong	
			☐ Weak ☐ Moderate ☐ Strong	

7. Adoption and Usage Evidence

Commercialization and implementation value often depends on whether people actually use the product, process, or service. Track adoption friction early so the team can address it before scale-up.

Status	Value tracking item	Evidence / source	Owner / date
☐ Not started ☐ In progress ☐ Complete	Target users understand the intended purpose and how the solution fits into their workflow.		
☐ Not started ☐ In progress ☐ Complete	Users have completed onboarding, training, or orientation needed for the pilot or launch.		
☐ Not started ☐ In progress ☐ Complete	Usage frequency, completion rate, or engagement level is being tracked.		
☐ Not started ☐ In progress ☐ Complete	User questions, objections, and workarounds are being documented.		
☐ Not started ☐ In progress ☐ Complete	A clear support path exists for users who encounter problems.		
☐ Not started ☐ In progress ☐ Complete	The team has identified whether low adoption is caused by product fit, workflow fit, training, incentives, or technical barriers.		

8. Benefits Realization Scorecard

Score each value area from 1 to 5. Use the notes column to explain the score and identify what evidence would improve confidence.

Value area	Score 1-5	Evidence quality	Interpretation	Improvement needed
User value / problem relief		☐ Low ☐ Med ☐ High		
Technical performance in real context		☐ Low ☐ Med ☐ High		
Operational or workflow impact		☐ Low ☐ Med ☐ High		
Economic or financial value		☐ Low ☐ Med ☐ High		
Market or customer pull		☐ Low ☐ Med ☐ High		
Partner / stakeholder support		☐ Low ☐ Med ☐ High		
Scalability potential		☐ Low ☐ Med ☐ High		
Funding or commercialization relevance		☐ Low ☐ Med ☐ High		

9. Value Risks and Confounders

Use this table to identify reasons the value signal may be misleading, incomplete, or difficult to interpret.

Risk / confounder	How it could distort results	Likelihood	Impact	Mitigation
Sample size too small		☐ L ☐ M ☐ H	☐ L ☐ M ☐ H	
Pilot users not representative		☐ L ☐ M ☐ H	☐ L ☐ M ☐ H	
Baseline data incomplete		☐ L ☐ M ☐ H	☐ L ☐ M ☐ H	
External event affected results		☐ L ☐ M ☐ H	☐ L ☐ M ☐ H	
Adoption barrier unrelated to core value		☐ L ☐ M ☐ H	☐ L ☐ M ☐ H	
Stakeholder expectations changed		☐ L ☐ M ☐ H	☐ L ☐ M ☐ H	

10. Decision Thresholds

Define the evidence needed to make a next-step decision. This prevents teams from declaring success or failure without clear criteria.

Decision option	Minimum evidence needed	Decision trigger	Responsible decision-maker

Continue with limited adjustments			
Expand pilot or launch more broadly			
Seek funding, partner, or investor support			
Pivot product, workflow, or market focus			
Pause or stop			

11. Value Summary for Leadership, Funders, or Partners

Use this section to prepare a concise narrative of the value demonstrated so far.

What changed as a result of this pilot, implementation, or commercialization activity?
What evidence supports that claim?
What remains uncertain or unresolved?
What next investment, partnership, funding, or implementation decision is recommended?

12. Next-Step Action Plan

Action item	Owner	Due date	Dependency	Status

ScienceDocs Support

Need help applying this tool? ScienceDocs supports commercialization, change management, AI adoption, grant strategy, and operational optimization. We help teams translate early evidence into practical decisions, stronger proposals, implementation plans, and market-facing strategies.