TEMPLATE 18 · INNOVATION

Stage-Gate Funding Scorecard

Fund new ideas in stages: a little money to learn, more as evidence builds, and a clear decision at every gate.

InflexionIQ

Big up-front budgets for unproven ideas encourage people to defend them. Small, staged funding encourages people to learn.

> *Kill ideas early and cheaply, and celebrate it. That's where the savings are.*

HOW TO USE IT

01 **Agree the criteria and weights** before any idea is presented.

02 **Score with evidence,** 1 to 5 per criterion. No evidence, no score above 2.

03 **Decide at the gate:** Go, Pivot, Hold or Stop, and how much to release.

04 **Track the pipeline** across gates so the portfolio stays balanced (page 3).

FOUR GATES

G0 Idea
Problem worth solving?
Small budget for discovery: weeks, not months.

G1 Discovery
Do customers care?
Funding to test desirability with real customers.

G2 Validation
Will it work and pay?
Funding for a pilot or minimum viable product.

G3 Scale
Ready to grow?
Full investment case (template 17) and a home in the business.

DEFAULT CRITERIA AND WEIGHTS

CRITERION	WHAT A 5 LOOKS LIKE	WEIGHT
Strategic fit	Supports our priorities and the horizon we're funding.	15%
Customer evidence	Real evidence that customers want it and would pay.	25%
Feasibility	We can build and deliver it, alone or with partners.	15%
Financial potential	Size of prize, margin and payback if it works.	20%
Team & capability	The right people, with the time to do it.	15%
Risk & exposure	Downside is limited and understood (5 = low risk).	10%

Decision rule. Weighted score 3.5 or more: Go. 2.5 to 3.5: Pivot or Hold. Under 2.5: Stop. Adjust to your risk appetite.

The Excel version scores up to ten ideas side by side, applies your weights and thresholds, and totals funding requested and released by gate.

Scoring

Weighted score = Σ weight × score

CRITERION	WEIGHT	SCORE	WEIGHTED	EVIDENCE
Strategic fit *Supports our priorities and the horizon we're funding.*	15%	1–5		
Customer evidence *Real evidence that customers want it and would pay.*	25%	1–5		
Feasibility *We can build and deliver it, alone or with partners.*	15%	1–5		
Financial potential *Size of prize, margin and payback if it works.*	20%	1–5		
Team & capability *The right people, with the time to do it.*	15%	1–5		
Risk & exposure *Downside is limited and understood (5 = low risk).*	10%	1–5		

Total weighted score (out of 5)

Decision

- ☐ GO
- ☐ PIVOT
- ☐ HOLD
- ☐ STOP

Funding

Requested, released, and what it buys before the next gate.

Conditions

What must be true, or learned, by the next gate.

NEXT GATE DATE

DECIDED BY

Ideas by gate

Check the funnel: many ideas at G0, few at G3

IDEA	SPONSOR	CURRENT GATE	SCORE	REQUESTED (£K)	RELEASED (£K)	LAST DECISION	NEXT GATE
		G0 · G1 · G2 · G3	/5			GO · PIVOT · HOLD · STOP	
		G0 · G1 · G2 · G3	/5			GO · PIVOT · HOLD · STOP	
		G0 · G1 · G2 · G3	/5			GO · PIVOT · HOLD · STOP	
		G0 · G1 · G2 · G3	/5			GO · PIVOT · HOLD · STOP	
		G0 · G1 · G2 · G3	/5			GO · PIVOT · HOLD · STOP	
		G0 · G1 · G2 · G3	/5			GO · PIVOT · HOLD · STOP	
		G0 · G1 · G2 · G3	/5			GO · PIVOT · HOLD · STOP	
		G0 · G1 · G2 · G3	/5			GO · PIVOT · HOLD · STOP	
		G0 · G1 · G2 · G3	/5			GO · PIVOT · HOLD · STOP	
		G0 · G1 · G2 · G3	/5			GO · PIVOT · HOLD · STOP	
		G0 · G1 · G2 · G3	/5			GO · PIVOT · HOLD · STOP	
		G0 · G1 · G2 · G3	/5			GO · PIVOT · HOLD · STOP	
		G0 · G1 · G2 · G3	/5			GO · PIVOT · HOLD · STOP	