Project No. _____ Evaluator No. _____ Evaluator's Name _____

INNOVATION EVALUATION INSTRUMENT

by
Gerald G. Udell and Kenneth G. Baker

Innovation Center
College of Business Administration
University of Oregon
Eugene, Oregon 97403

DIRECTIONS:
Check the response that best corresponds to your evaluation for each criterion. Be sure you answer all questions. NOTE that "don't know" and "not applicable" responses are coded "DK" and "NA". Be SURE to use them when they are appropriate.

After each group of factors, a space is provided for your written comments relative to that section. If you have any specific information, comments or suggestions, use this space. These comments are highly useful in providing additional information and insights.

SOCIETAL FACTOR (P. 23)

1. (P.23) LEGALITY CRITERION: In terms of applicable laws (particularly product liability), regulations, product standards, this idea/invention/new product . . .

End Statements
_____ will not meet them, even if changed
_____ will require substantial revision to meet them
_____ will require modest revision
_____ will require minor changes
_____ will meet them without any changes

_____ DK
_____ NA

Total 100 Points

2. (P.26) SAFETY CRITERION: Considering potential hazards and side effects, the use will be:

End Statements
_____ very unsafe, even when used as intended
_____ unsafe under reasonably foreseeable circumstances
_____ relatively safe for careful, instructed users
_____ safe when used as intended, with no foreseeable hazards
_____ very safe under all conditions, including misuse

_____ DK
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Total 100 Points

3. (P.27) ENVIRONMENTAL IMPACT CRITERION: In terms of pollution, litter, misuse of natural resources, etc., use might . . .

End Statements
_____ violate environmental regulations or have dangerous environmental consequences
_____ have some negative effect on the environment
_____ have no effect on the environment if properly used
_____ have no effect on the environment
_____ have a positive impact on the environment

_____ DK
_____ NA

Total 100 Points

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4. (P.29) SOCIETAL IMPACT CRITERION: In terms of the impact (benefit) upon the general welfare of society, use might . . .

End Statements
- _____have substantial negative effect
- _____have some negative effect
- _____have no effect if properly used
- _____have no effect on society
- _____have a positive benefit to society

Total 100 Points

_____DK

_____NA

COMMENTS:

BUSINESS RISK FACTOR: (P. 31)

5. (P.31) FUNCTIONAL FEASIBILITY CRITERION: In terms of intended functions, will it actually do what it is intended to do?

End Statements
- _____the concept is not sound; cannot be made to work
- _____it won't work now, but might be modified
- _____it will work but major changes may be needed
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- _____it will work – no changes necessary

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6. (P.33) PRODUCTION FEASIBILITY CRITERION: With regard to technical processes or equipment required for production, this invention will . . .

End Statements
- _____be impossible to produce now or in the foreseeable future
- _____be very difficult to produce
- _____have some problems which can be overcome
- _____have only minor problems
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Total 100 Points

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7. (P.34) STAGE OF DEVELOPMENT CRITERION: Based on available information, there is . . .

End Statements
- _____only an idea with drawings and/or description; no prototype
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- _____greater than returns – should be dropped
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- _____moderate – recoverable within five years
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9. (P.36) PAYBACK PERIOD CRITERION: The expected payback period (time required to recover initial investment) is likely to be . . .

End Statements
- _____over 10 years
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10. (P.40) PROFITABILITY CRITERION: Profitability is defined as the extent to which anticipated revenues will cover the relevant costs (direct, indirect, and capital). Anticipated revenues:

End Statements
_____will not cover any of the relevant costs
_____will cover direct costs but contribute minimally to indirect and capital costs (ROI) _____NA
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Total 100 Points

11. (P.41) MARKETING RESEARCH CRITERION: The marketing research required to develop a market-ready product is estimated to be:

End Statements
_____extremely difficult and complex
_____relatively difficult and complex _____DK
_____moderately difficult
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12. (P.42) RESEARCH AND DEVELOPMENT CRITERION: The research and development required to reach the production-ready stage will be . . .

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COMMENTS:

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13. (P.45) POTENTIAL MARKET CRITERION: The total market for products of this type might be:

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14. (P.48) POTENTIAL SALES CRITERION: Expected sales of this product might be:

End Statements
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_____large _____NA
_____very large
Total 100 Points

15. (P.50) TREND OF DEMAND CRITERION: The market demand for products of this type appears to be:

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_____declining _____DK
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_____growing slowly _____NA
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- _____highly unstable – subject to severe unpredictable fluctuations
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End Statements
- _____very obscure – very difficult and/or costly to communicate
- _____obscure – requires substantial explanation
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- _____visible – easily communicated
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24. (P.66) PROMOTION CRITERION: The costs and effort required to promote the advantages, features, and benefits are likely to be:

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Total 100 Points

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28. (P.73) FUNCTION CRITERION: Relative to competing and/or substitute products, services or processes, the function performed may be perceived as:

End Statements
- _____very inferior
- _____inferior – offers no improvement
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Total 100 Points

_____DK

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Total 100 Points

_____DK

_____NA

30. (P.75) PRICE CRITERION: Relative to competition and/or substitute products, the selling price is likely to be:

End Statements
_____much higher – a definite competitive disadvantage
_____higher – a competitive disadvantage
_____about the same
_____lower – a competitive advantage
_____much lower – an important competitive advantage

Total 100 Points

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31. (P.77) EXISTING COMPETITION CRITERION: Existing competition for this innovation appears to be:

End Statements
_____very high – new entry will be difficult and costly
_____high – only a small market share can be gained
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_____very high – product lead will be very short
_____high – product lead will be relatively short
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Total 100 Points

_____DK

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End Statements
_____no legal protection or secrecy possible
_____no legal protection but some secrecy might be possible
_____limited legal protection but some secrecy might be possible
_____may be patented, copyrighted and/or short run secrecy possible
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COMMENTS:

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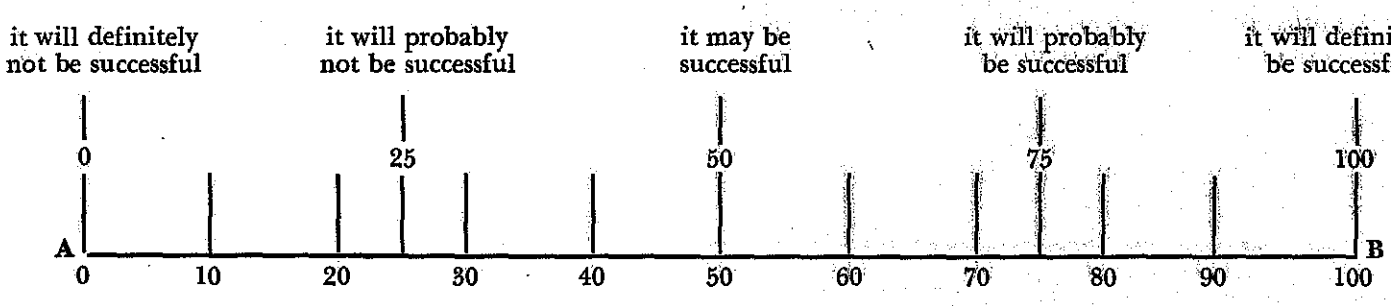

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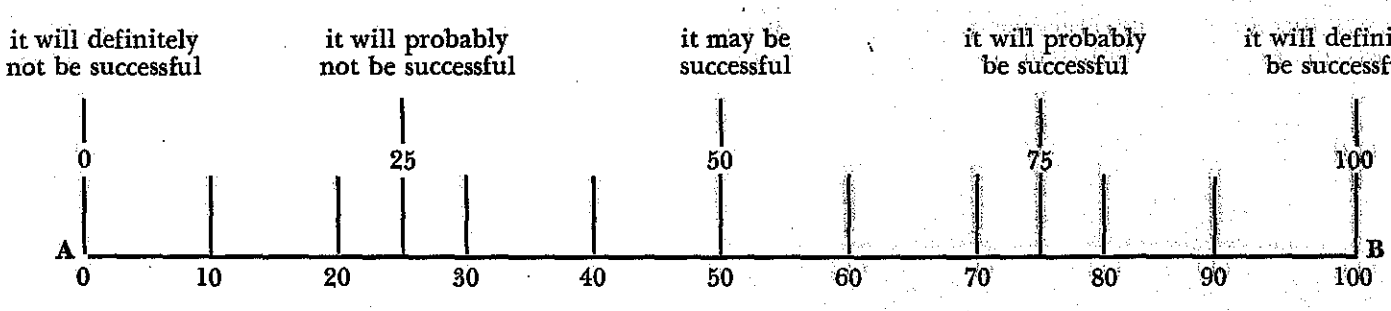

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SOCIETAL FACTOR (P. 23)

1. (P.23) LEGALITY CRITERION: In terms of applicable laws (particularly product liability), regulations, product standards, this idea/invention/new product . . .

End Statements
_____will not meet them, even if changed
_____will require substantial revision to meet them
_____will require modest revision
_____will require minor changes
_____will meet them without any changes
Total 100 Points

_____DK
_____NA

2. (P.26) SAFETY CRITERION: Considering potential hazards and side effects, the use will be:

End Statements
_____very unsafe, even when used as intended
_____unsafe under reasonably foreseeable circumstances
_____relatively safe for careful, instructed users
_____safe when used as intended, with no foreseeable hazards
_____very safe under all conditions, including misuse
Total 100 Points

_____DK
_____NA

3. (P.27) ENVIRONMENTAL IMPACT CRITERION: In terms of pollution, litter, misuse of natural resources, etc., use might . . .

End Statements
_____violate environmental regulations or have dangerous environmental consequences
_____have some negative effect on the environment
_____have no effect on the environment if properly used
_____have no effect on the environment
_____have a positive impact on the environment
Total 100 Points

_____DK
_____NA

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4. (P.29) SOCIETAL IMPACT CRITERION: In terms of the impact (benefit) upon the general welfare of society, use might . . .

End Statements
- _____have substantial negative effect
- _____have some negative effect
- _____have no effect if properly used
- _____have no effect on society
- _____have a positive benefit to society

Total 100 Points

_____DK

_____NA

COMMENTS:

BUSINESS RISK FACTOR: (P. 31)

5. (P.31) FUNCTIONAL FEASIBILITY CRITERION: In terms of intended functions, will it actually do what it is intended to do?

End Statements
- _____the concept is not sound; cannot be made to work
- _____it won't work now, but might be modified
- _____it will work but major changes may be needed
- _____it will work but minor changes might be needed
- _____it will work – no changes necessary

Total 100 Points

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6. (P.33) PRODUCTION FEASIBILITY CRITERION: With regard to technical processes or equipment required for production, this invention will . . .

End Statements
- _____be impossible to produce now or in the foreseeable future
- _____be very difficult to produce
- _____have some problems which can be overcome
- _____have only minor problems
- _____have no problems

Total 100 Points

_____DK

_____NA

7. (P.34) STAGE OF DEVELOPMENT CRITERION: Based on available information, there is . . .

End Statements
- _____only an idea with drawings and/or description; no prototype
- _____a rough prototype which demonstrates the concept but is not fully developed and tested
- _____a rough prototype with performance and safety testing completed
- _____a final prototype with testing completed; however, minor changes might be needed
- _____a market-ready prototype

Total 100 Points

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_____NA

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End Statements
- _____greater than returns – should be dropped
- _____excessive – might not be recoverable
- _____heavy – probably recoverable
- _____moderate – recoverable within five years
- _____ low – recoverable within two years

Total 100 Points

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_____NA

9. (P.36) PAYBACK PERIOD CRITERION: The expected payback period (time required to recover initial investment) is likely to be . . .

End Statements
- _____over 10 years
- _____7 to 10 years
- _____4 to 6 years
- _____1 to 3 years
- _____ less than one year

Total 100 Points

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10. (P.40) PROFITABILITY CRITERION: Profitability is defined as the extent to which anticipated revenues will cover the relevant costs (direct, indirect, and capital). Anticipated revenues:

End Statements
_____will not cover any of the relevant costs
_____will cover direct costs but contribute minimally to indirect and capital costs (ROI)
_____will cover direct and indirect costs but might not meet capital costs (ROI)
_____will cover direct and indirect costs and meet minimum capital costs (ROI)
_____will cover direct and indirect costs and easily exceed capital cost (ROI)

Total 100 Points

_____NA

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11. (P.41) MARKETING RESEARCH CRITERION: The marketing research required to develop a market-ready product is estimated to be:

End Statements
_____extremely difficult and complex
_____relatively difficult and complex
_____moderately difficult
_____relatively easy and simple
_____very simple and straightforward

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_____extremely difficult and complex
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Total 100 Points

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COMMENTS:

DEMAND ANALYSIS FACTOR (P. 45)

13. (P.45) POTENTIAL MARKET CRITERION: The total market for products of this type might be:

End Statements
_____very small – very specialized or local in nature
_____small – relatively specialized or regional in nature
_____medium – limited national market
_____large – broad national market
_____very large – extensive national and possible international market

Total 100 Points

_____DK

_____NA

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End Statements
_____very small
_____small
_____medium
_____large
_____very large

Total 100 Points

_____DK

_____NA

15. (P.50) TREND OF DEMAND CRITERION: The market demand for products of this type appears to be:

End Statements
_____rapidly declining – product might soon become obsolete
_____declining
_____steady – demand expected to remain constant
_____growing slowly
_____rapidly expanding

Total 100 Points

_____DK

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16. (P.52) STABILITY OF DEMAND CRITERION: The fluctuation in demand is likely to be:

End Statements
_____highly unstable – subject to severe unpredictable fluctuations
_____unstable – susceptible to moderate unpredictable fluctuations
_____predictable
_____stable – variations can be accurately foreseen
_____highly stable – not susceptible to fluctuations

Total 100 Points

_____DK

_____NA

17. (P.52) PRODUCT LIFE CYCLE CRITERION: The product life cycle is likely to be:

End Statements
_____less than two years
_____two to four years
_____five to seven years
_____eight to ten years
_____more than ten years

Total 100 Points

_____DK

_____NA

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End Statements
_____very limited – single product only
_____limited to minor modifications only
_____moderate – multiple markets/use potential
_____high – new product spin-offs likely
_____very high – could be foundation of a new industry

Total 100 Points

_____DK

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COMMENTS:

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19. (P.57) COMPATIBILITY CRITERION: Compatibility with existing attitudes and methods of use is:

End Statements
_____very low – will block market acceptance
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_____low – minimal instructions needed
_____very low – no instructions needed

Total 100 Points

_____DK

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End Statements
_____very low – gimmick soon forgotten by the owner
_____low – would only superficially fulfill psychological non-essential needs
_____moderate – fulfills both psychological and physical non-essential needs
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_____very high – fulfills both psychological and physical needs

Total 100 Points

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End Statements
_____very high – no market control
_____high – little market control
_____moderate – reasonable market control
_____low – strong market control
_____very low – complete market control

Total 100 Points

_____DK

_____NA

23. (P.64) VISIBILITY CRITERION: The advantages and benefits are:

End Statements
_____very obscure – very difficult and/or costly to communicate
_____obscure – requires substantial explanation
_____visible – requires some explanation
_____visible – easily communicated
_____very visible – might generate word of mouth communication
Total 100 Points

_____DK
_____NA

24. (P.66) PROMOTION CRITERION: The costs and effort required to promote the advantages, features, and benefits are likely to be:

End Statements
_____very high – prohibitive in relation to expected sales
_____high relative to expected sales
_____moderate – commensurate with expected sales
_____low relative to expected sales
_____very low relative to expected sales
Total 100 Points

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_____NA

25. (P.67) DISTRIBUTION CRITERION: The cost and difficulty of establishing distribution channels are likely to be:

End Statements
_____very high – prohibitive in relation to expected sales
_____high relative to expected sales
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Total 100 Points

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_____NA

26. (P.68) SERVICE CRITERION: The cost and difficulty associated with providing product service is likely to be:

End Statements
_____very high – will require frequent service and parts
_____high – will need periodic service and parts
_____moderate – will need occasional service and parts
_____low – need for service and parts will be infrequent
_____very low – will require little or no parts and service
Total 100 Points

_____DK
_____NA

COMMENTS:

COMPETITIVE FACTOR: (P. 71)

27. (P.72) APPEARANCE CRITERION: Relative to competition and/or substitutes, appearance is likely to be perceived as:

End Statements
_____very inferior – no customer appeal
_____inferior – little customer appeal
_____similar to other products
_____superior – has customer appeal
_____very superior – has strong customer appeal
Total 100 Points

_____DK
_____NA

28. (P.73) FUNCTION CRITERION: Relative to competing and/or substitute products, services or processes, the function performed may be perceived as:

End Statements
_____very inferior
_____inferior – offers no improvement
_____similar – not noticeably better
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Total 100 Points

_____DK
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End Statements
_____very inferior – a definite competitive disadvantage
_____inferior – cannot be promoted as an improvement
_____similar – not noticeably better
_____superior – easily promoted as a major improvement
_____very superior

Total 100 Points

_____DK

_____NA

30. (P.75) PRICE CRITERION: Relative to competition and/or substitute products, the selling price is likely to be:

End Statements
_____much higher – a definite competitive disadvantage
_____higher – a competitive disadvantage
_____about the same
_____lower – a competitive advantage
_____much lower – an important competitive advantage

Total 100 Points

_____DK

_____NA

31. (P.77) EXISTING COMPETITION CRITERION: Existing competition for this innovation appears to be:

End Statements
_____very high – new entry will be difficult and costly
_____high – only a small market share can be gained
_____moderate – market penetration can be gained with reasonable effort and expense
_____low – a significant market share can be gained
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Total 100 Points

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End Statements
_____very high – product lead will be very short
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Total 100 Points

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End Statements
_____no legal protection or secrecy possible
_____no legal protection but some secrecy might be possible
_____limited legal protection but some secrecy might be possible
_____may be patented, copyrighted and/or short run secrecy possible
_____can definitely be patented, copyrighted and/or long term secrecy possible

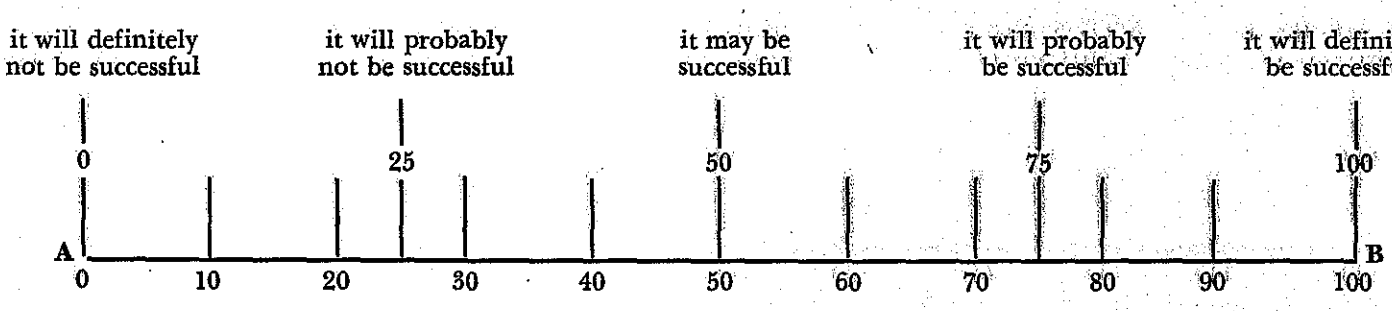
Total 100 Points

_____DK

_____NA

COMMENTS:

In my opinion, the likelihood of this idea, process or product being successful in the marketplace is: (Place an X at the appropriate place on the line marked A - B.)



Project No. _____ Evaluator No. _____ Evaluator's Name _____

INNOVATION EVALUATION INSTRUMENT

by
Gerald G. Udell and Kenneth G. Baker

Innovation Center
College of Business Administration
University of Oregon
Eugene, Oregon 97403

DIRECTIONS:
Check the response that best corresponds to your evaluation for each criterion. Be sure you answer all questions. NOTE that "don't know" and "not applicable" responses are coded "DK" and "NA". Be SURE to use them when they are appropriate.

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COMMENTS:

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Total 100 Points

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_____NA

COMMENTS:

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