



# EnergyMeasures

Tailored measures supporting energy vulnerable households

## D5.4 Guidelines for user-centred business modelling workshops



<http://www.energymeasures.eu>



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## About EnergyMeasures

EnergyMeasures is working to address energy poverty in seven European countries, namely: Belgium, Bulgaria, Ireland, Netherlands, North Macedonia, Poland, and the United Kingdom. The project comprises two complementary and synergistic strands of work.

The first strand involves working with energy poor households to improve their energy efficiency through a combination of low-cost measures, and changes in energy-related behaviours and practices. Recruited householders will be provided with low-cost energy measures and empowered to change their energy-related behaviours and practices through an approach that takes account of existing housing conditions and is reflective of their lived experience.

The second strand comprises working with municipalities, energy authorities, housing associations and other relevant actors to assess how current multi-level institutional contexts affect efforts to alleviate energy vulnerability in the participating countries. This knowledge will be used to develop and support the implementation of policy and practice measures which will address structural issues that combine to trap households in energy poverty.

Through this work the project contributes to reducing participants' vulnerability to energy poverty, while at the same time cutting household energy consumption and associated GHG emissions.

For more information see <http://www.energymeasures.eu>

## *Executive summary*

This report provides guidelines for the implementation of user-centred business modelling workshops as a means of supporting the tailoring / development of innovative support schemes addressing energy poverty.

## *Glossary*

BM	Business Model
EM	EnergyMeasures
MM	Mission Model
VP	Value Proposition

# 1 Introduction

Business models can be considered somewhat like blueprints for implementing strategy through organisational structures, processes, and systems (Osterwalder & Pigneur 2010). Notwithstanding a certain ‘murkiness’ in its definition, the business model concept and associated tools offer a useful means of sketching out and visualising new business ideas or re-considering existing businesses (or projects). Such approaches are not just applicable to commercial undertakings but can also be useful in the development of non-profit initiatives. This report provides an overview of business models, considers the best approaches to deliver user-centred workshops and offers a template and guidance for the design and delivery of such workshops for innovation in initiatives to support energy poor households.

Concepts such as business models are useful to sketch out and visualise new projects, initiatives, or businesses. Osterwalder & Pigneur (2010) argue that the business model concept *‘can become a shared language that allows you to easily describe and manipulate business models to create new strategic alternatives.’* Business model visual tools can be used to map and better understand key details of the proposed innovation. They allow innovators (including social innovators) to extract themselves from the detail of the planning to take a bird’s eye view of how things will work in practice. This enables preliminary deliberation on key elements contributing to better designed business models.

Business model innovation is inherently a group activity, the visual nature of the aforementioned tools supports such collaboration. Business model workshops (virtually or in-person) offer an opportunity for people to work together with colleagues, managers, stakeholders, and peers step-by-step through business model development. This report provides guidelines and resources for planning and delivering user-centred business modelling workshops for those working to support energy poor households. The developed workshop programme aims to: provide information on business model innovation and value creation; support participants to become familiar with business model visual(isation) tools; reinforce (and test) this learning through guided exercises and group work.

There are five sections in this report, this first section offers an introduction and gives background to the report. The second comprises a brief treatment of business models and presents some visual chart tools for the development of business models. The third section provides an overview of good practice in workshop planning and implementation. The next section comprises an example plan for user-centred workshops aimed at developing (and reconfiguring) energy poverty support schemes. The final considers some lessons drawn from the preparation of this report and offers some final thoughts pertinent to the realisation of workshop objectives.

## 2 Business model

### 2.1 What’s in a name?

While the term ‘business model’ almost instinctively relates its basic meaning, Porter (2001) observes *‘the definition of a business model is murky as best.’* DaSilva & Trkman (2013, p. 379) agree noting that it *‘often appears to encompass everything from, among others, strategy, economic model, and revenue model.’* In practice, there seem to be a variety of understandings of the ‘business model’ concept (with some regional

differentiation<sup>1</sup>) – ranging from a generic term to mean the way in which an organisation does business, (e.g., Gebauer and Ginsburg, 2003) to a model of a company's business logic (e.g., Osterwalder 2004).

The lack of clarity around the business model concept is compounded by occasional confusion or conflation with the term business process model – not helped by the common use of the term 'business modelling' to mean developing a business process model. Gordijn *et al.* (2000) note that they are both approaches to the conceptual modelling of business, they do very different jobs – with business process models focusing on implementation (what processes are to be carried out, how and by whom) and business models focusing on value creation and distribution (how a business is organised). This focus on value is central to the development of successful undertakings, including social enterprises – with its emphasis on who is creating and exchanging value, with whom and why?

## 2.2 Value proposition

Value is defined in the Oxford Dictionary of English as '*the regard that something is held to deserve; the importance, worth, or usefulness of something*' or '*the material or monetary worth of something*' (OUP, 2010). In terms of a product or service it can be considered to be '*... determined by the utility combination of benefits delivered to a customer less the total costs of acquiring the delivered benefits*' (Walters & Lancaster, 1999, p. 643), or more simply the combination of benefits, in whatever way they are defined, compared with the costs involved in obtaining them (Morrissey *et al.*, 2014)<sup>2</sup>.

How features of products and services are assembled and offered to meet customers' needs are established and described as a 'value proposition'. In forwarding the value proposition concept, Lanning & Michaels (1988) reimagined the traditional business system, from one focused on producing and selling products, to one centred around delivering value to customers. In the traditional approach products were designed and produced (without a full understanding of customers' needs<sup>3</sup>), followed by research to devise product positioning and marketing to convince prospective purchasers. The reconceptualisation of business operations as a value delivery system has turned this on its head with a growing realisation of the need to understand what prospective customers want (even if they don't initially know themselves) before designing a product. Once considered quite separate, each the activities associated with product design, manufacturing, pricing, distribution, and after-sales service, are in this perspective considered as components of value delivery<sup>4</sup>. Considering the centrality of delivering value to business, Osterwalder & Pigneur's (2010, p. 14) succinct description of business model as the '*rationale of how an organization creates, delivers, and captures value*' is particularly apt.

<sup>1</sup> De Reuver, Bouwman, and Haaker (2013) note a difference between European and American perspectives. They note that Americans focus principally on classification within specific sectors (see e.g., Afuah & Tucci 2003) or use for open innovation (e.g., Chesbrough 2003). Whereas Europeans have tended to focus on developing 'practical approaches to design and test new business models' (see e.g., Gordijn & Akkermans 2001).

<sup>2</sup> However, there is a tendency in the literature to use value to mean different things at the same time. This is often a conflict (albeit unstated) between value to company (sales revenue and profits) and value to the customer (utility/cost benefits). When for instance Sirmon, Hitt, & Ireland (2007, p. 273) ambiguously say 'the primary pursuit of business is to create value' they are actually referring to (monetary) value for the firm.

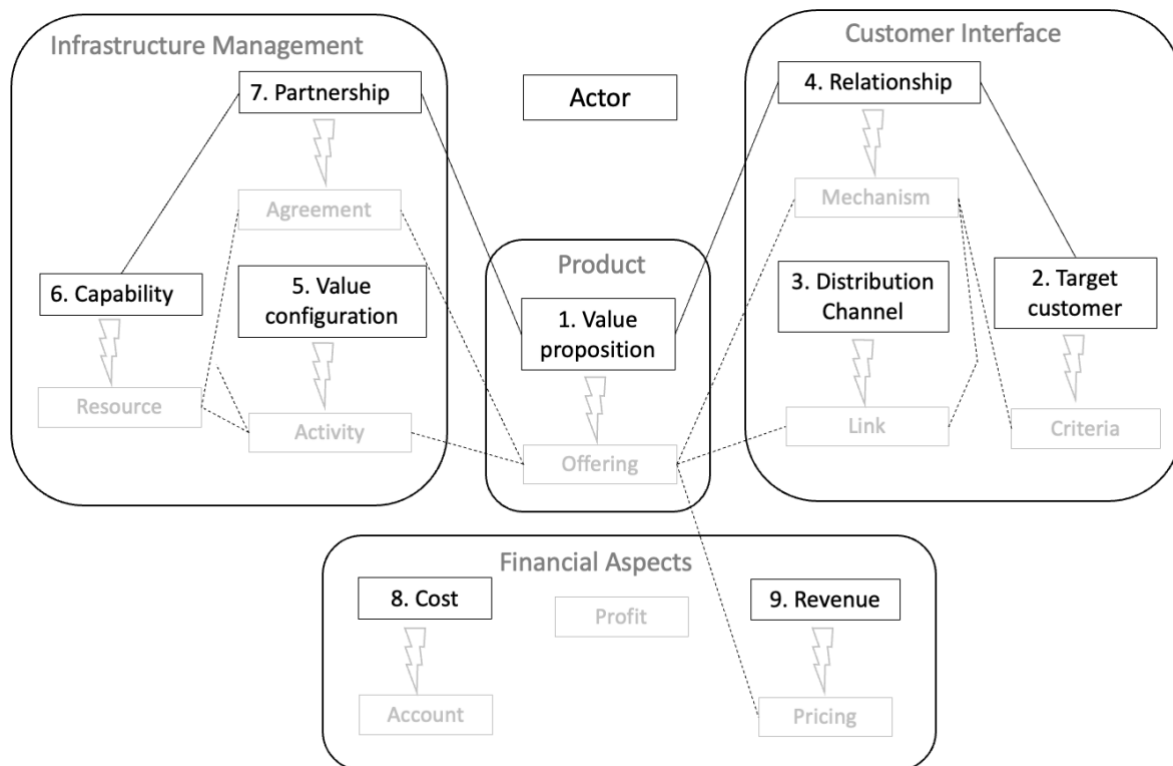
<sup>3</sup> In some cases, it might even be argued that companies don't truly know why some products sold better than other.

<sup>4</sup> Thus, market research, once solely focused on how a product was positioned on the marketplace is now instrumental in the creation of the value proposition and directly feeding into the design of product and services.



## 2.3 BM components

Osterwalder forwarded a most useful ontology of a business model in his seminal doctoral thesis (2004), in which he explored the different elements of a business model and their relationship to value delivery. He forwarded the four pillars shown in Figure 1 and described below.



**Figure 1: Business Model Components** (adapted from Dunphy & Morrissey 2015 after Osterwalder 2004)

Product: overall view of product / service that provide value to customers [1. Value proposition].

Customer interface: market segment to which value is be offered [2. Target customer]; means of communicating with the customer [3. Distribution channel]; links with customers [4. Relationship].

Infrastructure management: arrangement of required activities and resources [5. Value configuration]; ability to execute required actions for value creation [6. Capability]; agreement between two or more organisations to facilitate value creation [7. Partnership].

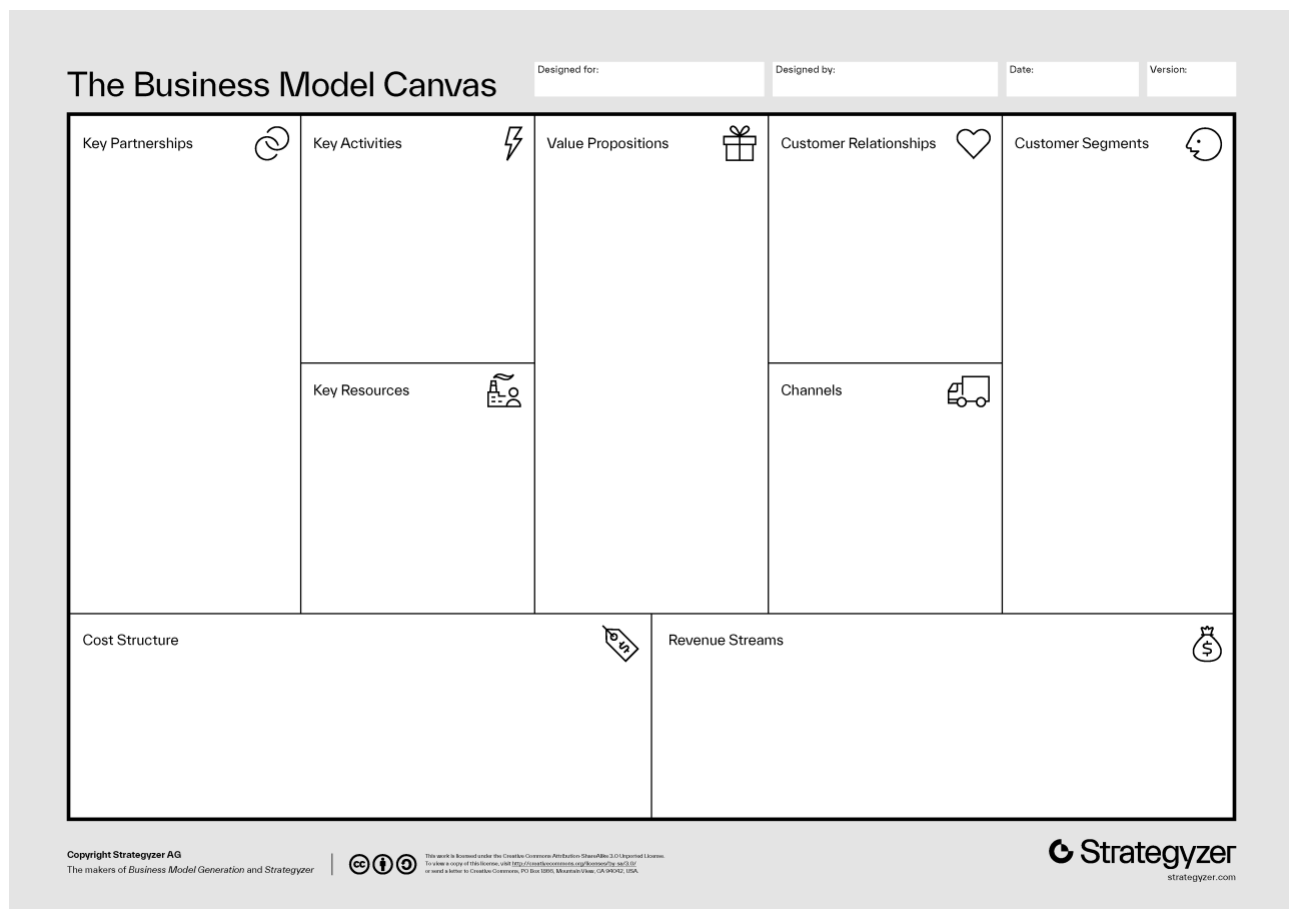
Financial aspects: representation of financial means employed [8. cost structure]; way in which money is made [9. Revenue model].

The larger the amount, and the higher the quality, of information used the greater the granularity of the descriptions of value configuration, partnerships, and capabilities in the business model. This offers a basis for developing a greater understanding of the stakeholder relationships involved in the business, and for aligning strategies and processes towards meeting business objectives, which typically (but not necessarily) means increased revenue and profits<sup>5</sup>.

<sup>5</sup> Dunphy & Morrissey (2015) discuss that the conceptual framework is sufficiently pliable to be adapted for use with other value classes, such as greenhouse gas emissions. In such cases, the second value would supplement rather than supplant financial return.

## 2.4 BM tools

Building on this work and in collaboration with others, this understanding was refined, and an entrepreneurial tool forwarded based (Osterwalder & Pigneur, 2010). The developed Business Model Canvas, a visual chart shown in Figure 2 below to aid in the description, design, challenge, and (re)invention of business models. The canvas comprises nine building blocks which together combine to represent a business model for a business or other undertaking: Customer segments; Value proposition; Channels; Customer relationships; Key activities; Key resources; Revenue streams; and Cost structure.

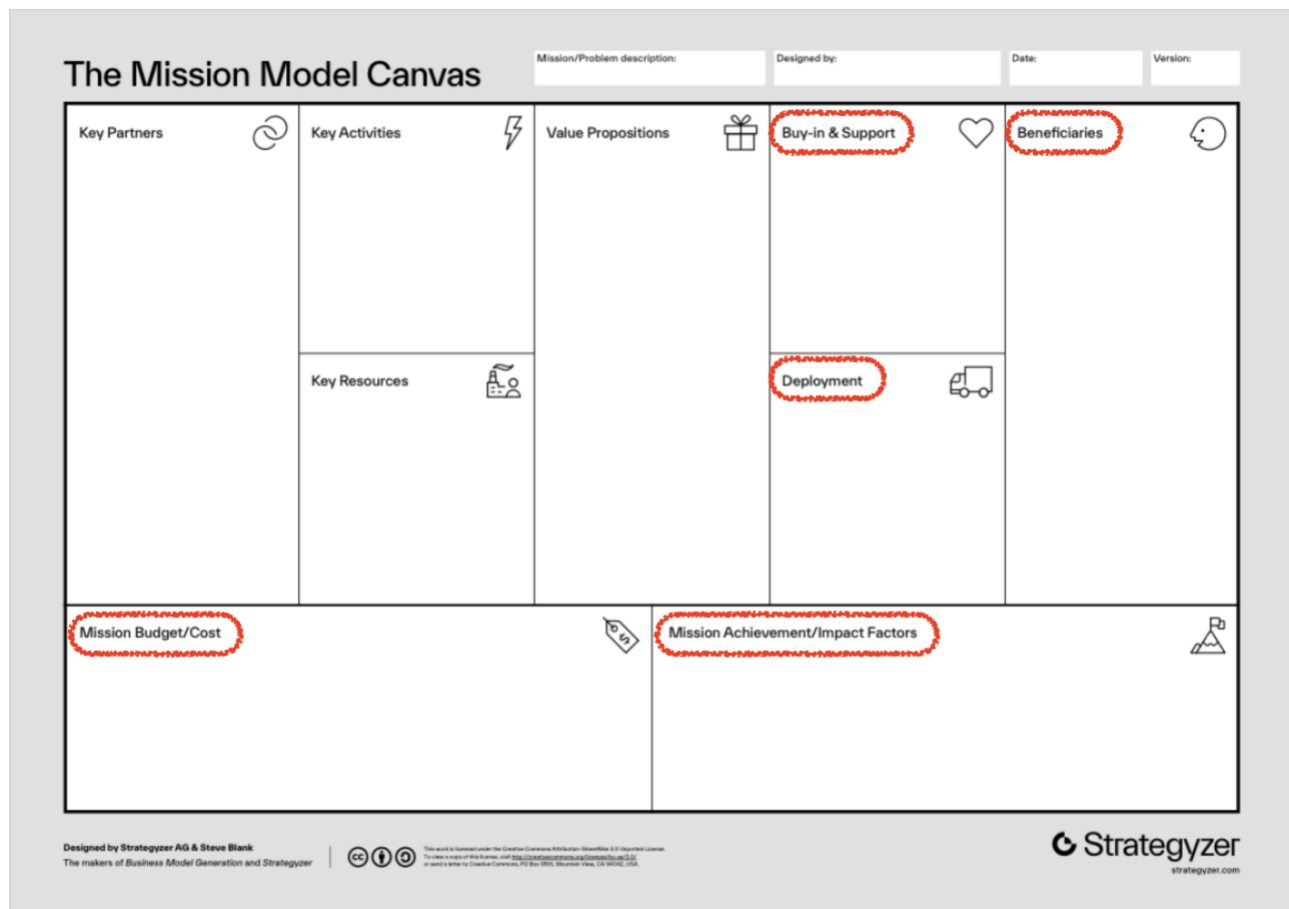


**Figure 2: Business Model Canvas<sup>6</sup>**

Osterwalder and Pigneur (2010, pp. 16–17) explain the relationships of these building blocks thusly – an organisation serves one or more customer segments (2), by solving customer needs with value propositions (1), which are delivered to customers through communication, distribution and sales channels (3). Throughout these interactions, revenue streams (9) result from each value proposition successfully offered to customers and customer relationships (4) are established and maintained. In delivering the value proposition several key activities (5) are performed utilising key resources (6) within the company and working with key partners (7) through the outsourcing of certain activities and acquisition of some resources. The previous outlined elements define the cost structure (8) of the business model.

<sup>6</sup> Available to download from <https://www.strategyzer.com/library/the-business-model-canvas>

Seen the application of the business model canvas for organisations not driven by a profit motive. Osterwalder's company Strategyzer AG developed an adaptation of the Business Model Canvas known as the Mission Model Canvas for so-called mission driven organisations (originally for the US Department of Defense). In this reimagined canvas the metric of success is not revenue but rather mission achievement. Reflecting the differences between the profit and non-profit ventures, five building blocks were relabelled as indicated in Figure 3, namely: Revenue Streams to *Mission Achievement*; Customer Segments to *Beneficiaries*; Cost Structure to *Mission Cost/Budget*; Channel to *Deployment*; Customer Relationships to *Buy-in/Support*.



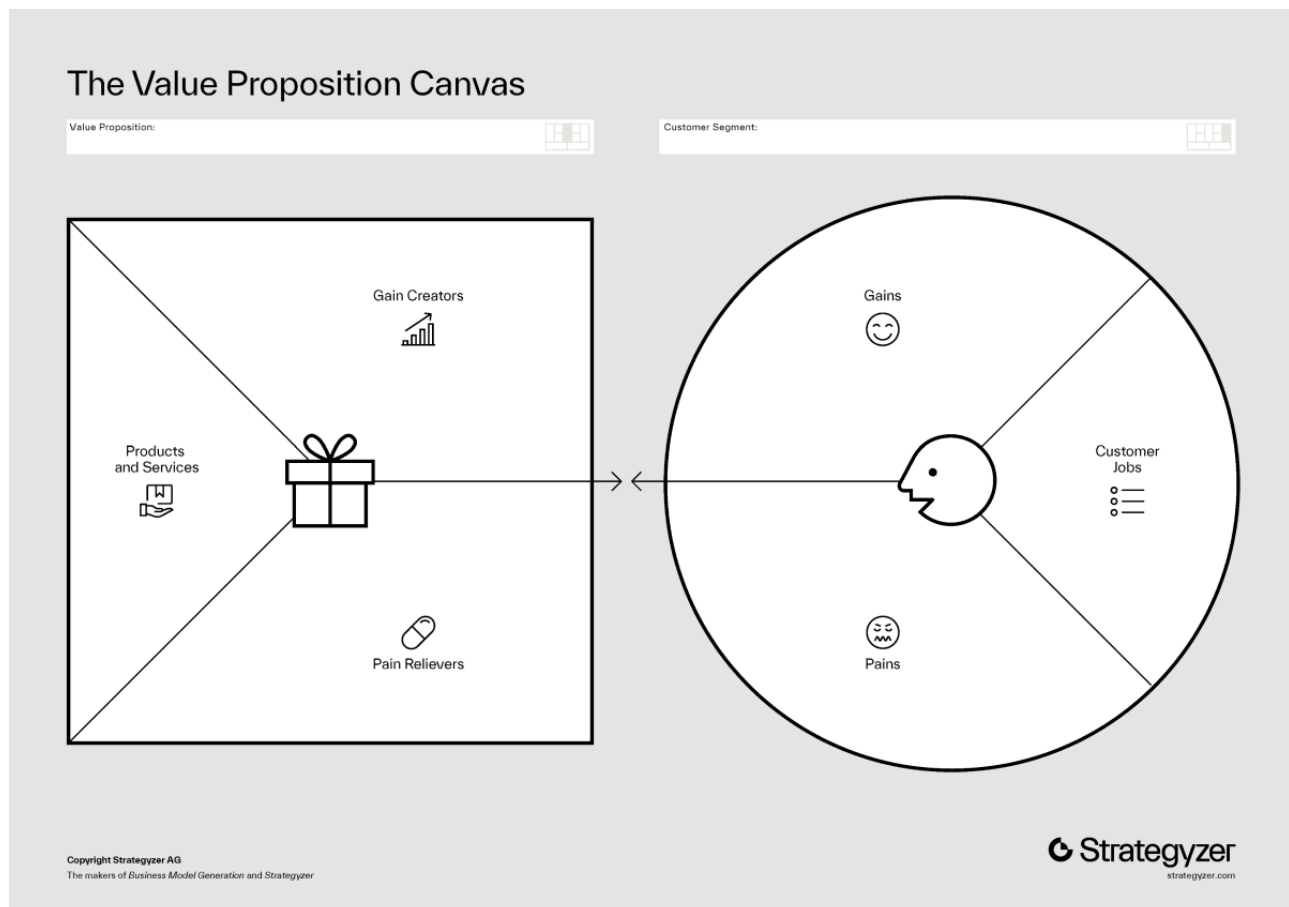
**Figure 3: Mission Model Canvas<sup>7</sup>**

Updating the narrative provided on the previous page, the relationships of the revised building blocks contained in the Mission Model Canvas can be explained as a mission-driven organisation serves one or more beneficiaries (2), by the effective deployment (3) of value propositions (1) to meet their needs. Throughout these interactions, each value proposition successfully offered to beneficiaries contributes to the achievement of the organisation's mission (9) resulting in buy-in and support (4) of beneficiaries and other key stakeholders. In delivering the value proposition several key activities (5) are performed utilising key resources (6) within the company and working with key partners (7) through the outsourcing of certain activities and acquisition of some resources. The previous outlined elements define the Mission Budget/Cost (8) of the business model.

One of the most important relationships of the Mission Model Canvas (and for that matter the business model canvas) is that between the beneficiaries (or customers in the case of the BM Canvas) and the value

<sup>7</sup> Available to download from <https://www.strategyzer.com/library/the-mission-model-canvas>

proposition (Osterwalder and Pigneur 2010). To aid the analysis of this key area, Osterwalder *et al.* (2015) developed the Value Proposition Canvas as shown in Figure 4 below. This is intended as a plug-in for the Mission Model Canvas (or BM Canvas), which focusses on the attributes of, and the interactions between, beneficiaries and the value proposition of the product or service provided for them. In using these two canvases together users can see the 'big picture' through the Mission Model Canvas and zoom in to the detailed picture of each beneficiary at the 'product fit' level with the Value Proposition Canvas.



**Figure 4: Value Proposition Canvas<sup>8</sup>**

The circle on the right of the Value Proposition Canvas is divided into three segments, focussed on the defining the profile of the beneficiaries. Here, the aim is to identify beneficiaries' major Jobs-to-be-done<sup>9</sup>, the pains they face when trying to accomplish their Jobs-to-be-done and the gains they perceive by getting their jobs done.

The square on the left is likewise divided into three sections, these are focused on defining the offering which is (being) devised to meet the needs of the beneficiaries. Here, the aim is to visualise the value to be created, characterise its most important components, and describe its relationship with the beneficiary profile – explaining how it will relieve pain and create gains documented in the first stage.

<sup>8</sup> Available to download from <https://www.strategyzer.com/library/the-value-proposition-canvas>

<sup>9</sup> In keeping with the adage 'People don't want quarter-inch drill bits. They want quarter-inch holes' – the focus is not on what product or service the beneficiary needs but rather what job they need done.

### 3 Workshops

#### 3.1 Characterising workshops

*'A 3-hour lecture is not a workshop. The word workshop implies that work will be done in a shop like atmosphere. This means the centre of attention should be on the students doing work, not on the expert gloating in their own ego. A cooking workshop means students cook things. A writing workshop means students write things. If most of your "workshop" is people not actually making anything, you should perhaps call it a class, a lecture, or a mistake.'*

Berkrun, 2013

The term workshop has in some discourse almost come to mean any organised group knowledge transfer session. There are of course many different forms of such sessions, with different objectives, formats and structures. Table 1 below provides an overview of a selection of different group session indicating their main characteristics.

**Table 1: Overview of different group sessions** (after Highmore Sims 2006, p. 19–20)

Type of session	Time frame	No. of participants	Attributes
Briefing	1-2 hours	varies	To disseminate information. Usually an one-way process, but occasionally with opportunity for feedback.
Presentation	Varies	varies	To disseminate information, led by person sharing information. Used to promote self, idea, products or services, Results orientated.
Meeting	1-2 hours	varies	To disseminate information, to discuss and (ideally) reach agreement on topic(s). Process and results orientated (often hampered by process).
Seminar	1-3 hours	20-30	To disseminate knowledge & information, led by expert in subject. Process or task orientated.
Group coaching	2h - ½ day	4-12	Highly task orientated to work on specific idea or issues
Lecture	½ -2 hours	varies	To disseminate knowledge & information, led by expert in subject. Passive learning. Process orientated
Workshop	varies	6-12	To disseminate skills and knowledge, often facilitated by someone experienced in these skills. Typically includes mixture of activities. Results orientated.

As can be seen from the above table, although often used as synonyms for each other, workshops differ from meetings fundamentally. Workshops are a structured, organised, results orientated way for group to collaborate, whereas meetings are more process orientated discussions and deliberations. The format and organisation of aims to avoid the usual challenges of teamwork (including *e.g.*, power differentials, asymmetrical knowledge, strong personalities, *etc.*) encourage productivity and facilitate valuable outcomes.

Workshops and focus groups are often conflated also and while there are many similarities, there are substantial differences. The main difference is that focus groups are all about conversation, eliciting opinions, different viewpoints and so on, whereas a workshop is more about achieving a task, reaching goals or arriving at a consensus. Workshops are also often considered to have an educational function; they tend to go on for longer than focus groups, perhaps three hours, a half-day or more. Table 2 below outline the distinguishing features of a workshop.

**Table 2: Distinguishing features of a workshop** (after Hamilton 2016, p. 3-4)

Workshop success factors	Signs it is not a workshop
There is a clear objective to achieve	There is no clear goal or output
There is a reason for it to be a workshop	Goal should be achieved in regular meeting
There is a clearly structured agenda	It is a brainstorm
The session is designed and run by a workshop leader	It is a collaborative session without a leader
All attendees have brought ideas or inspiration	People only start thinking about the objective when they walk into the room
The session brings new angles and fresh stimulus to the objective	There is no new information or inspiration in the session
People enjoy being there	It feels chaotic or stressful to be there
It enhances the groups collective intelligence	It is dominated by one or two participants
It is a stand-alone event with sufficient time allocated to achieving the objective.	It is a small section at the end of a meeting

As can be seen from above, workshops are designed to enable a high level of interaction between people around a set of shared topics or objectives, and can vary widely in topics, time allotted and goals. An important aspect of workshops is that they should develop a shared understanding and purpose among participants. There are many potential objectives of a workshop including for example, to resolve an issue, solve a problem, find agreement, or to generate ideas.

*‘A workshop is a collaborative working session in which a team achieves an agrees goal together’.*

Hamilton 2016, p. 1

### 3.2 Design and planning

The design of a workshop is as important as the delivery. The workshop should be thought of as a shared enterprise between the organisers and the participants, rather than an opportunity for so-called experts to lecture. Organisers must be prepared, and prepare the participants, for an interactive participatory session. The participants bring valuable experience and ideas to the table, and participation is central to the success of a workshop. To encourage and support participation (and minimise delays at the starts of the session), attendees should be sent information about the session (agenda, reading list, *etc.*) prior to attending. It is the responsibility of everybody (organiser, facilitator, participant) to ensure that they are sufficiently prepared for the event.

The background of potential participants should be considered in the development of a workshop – to ensure that it is pitched at the correct level for the attendees. If necessary, background research should be carried out on participants, or a pre-workshop survey conducted to ensure that the workshop programme will be suitable. The meeting space should be carefully chosen. It should be comfortable, with adequate ventilation, heating and light, and movable furniture. Seating arrangements should not establish a sharp separation between the audience and speakers, to encourage informality and interaction.

The workshop's goals, activities and programme should be carefully stated at the outset so that participants know what to expect. During the workshop (which can be relatively long) participants should be given time markers throughout the session. This can involve informing people several minutes before an activity ends, or making an announcement half an hour before breaking for lunch, *etc.* This will help to maintain focus as people know that they do not have long to wait for an activity to finish or for food to arrive.

Workshops work best with groups of six to twelve people. With larger groups, the scope for individual participation declines. The workshop programme should comprise varied activities, interspersed with sufficient comfort breaks and refreshments. Participants should be encouraged to work with their hands, and to move around the room. The role of facilitator is vital in workshops. They need to ensure everyone gets a say and that the strongest voices, or those with authority, do not dominate proceedings (Sanoff, 2000).

Hamilton (2016, p. 8) suggests there are three stages in workshops. The first, Creation, involves applying creative thinking over several rounds of idea generation, with the objective of developing an extensive list of ideas and options. In working towards this end, the idea is to be creative and spontaneous, gathering as many alternatives as possible without evaluation or critical thinking. This could take up to 60% of the workshop duration. The second, Evaluation, involves looking at the various collated alternatives, and considering the best ideas and examining any common themes. The group discusses the options and evaluates them in terms of their effectiveness and feasibility, choosing the best for further development. This stage is typically about 10% of the session. The third stage, Development, accounts for the final proportion of the workshop. The aim is to work on the best ideas emerging from the previous stages and develop them in fully thought-out concepts. The group (or groups) analyse the best ideas and work to combine '*the best elements and express the essence of the idea*'. The outcome of this process is a concise clearly expressed account of the best ideas, with initial ideas for next steps.

Table 3 below outlines the key elements to a successful workshop according to Hamilton (2016).

**Table 3: Ingredients for a successful workshop** (after Hamilton 2016, p. 9-10)

Activity	Description
Structure	Plan exercises in small teams to allow the topic to be approached from different angles by different groups of people.
Diversity	Invite a range of participants to make sure you have a team with diverse genders, backgrounds, opinions, and ethnicities.
Stimulus	Create inspiration from new or unusual sources to bring topics to life or stimulate thinking beyond the obvious.
Preparation task	Use time wisely by having the team do some thinking in advance and bring ideas with them to kick-start the session
Focus	Consider how to keep people focused and thinking deeply by being careful not to overwhelm them with information and keeping outside distractions (such as emails or phone calls) to a minimum.
Behaviour	Encourage positive, constructive behaviours such as conversational turn-taking within the workshop
Conflict	Plan for constructive conflict, polarised views, and challenges as a healthy process to create ideas.

### 3.3 Activities and tools

The table contained in this section present an overview of selected activities suitable for use in the conduct of workshops. The first, Table 4 below comprises a number of examples of activities which can be used as ‘icebreakers’ (which help participants get acquainted, relieve inhibitions, build trust and encourage participation) and/or ‘re-energizers’ to be used as transitions or a time to clear the mind reinvigorating participation (Chlup & Collins 2010).

**Table 4: Icebreaker (& re-energisers) activities**

Activity	Description
<i>Who Am I?</i>	Names of famous people or characters are written on sticky notes and stuck to participants’ foreheads (so they cannot see who they are). People attempt to guess their own identity by asking Yes or No questions (MacSweeney, <i>et al.</i> , 2018)
<i>People Bingo</i>	Participants are provided with bingo cards in which each square contains various characteristics. (e.g., has two siblings, lives in an apartment) Everyone mingles asking each other questions attempting to get a full house (Whitney, undated).
<i>Toilet paper game</i>	A roll of toilet paper is passed around the room and each person is invited to take as much as they wish. After the toilet paper has been distributed, participants are asked to share one fact about themselves for each square of paper they took ( <i>Ibid.</i> ).

The next type of related activities are check-in activities, examples of which are list in Table 5. These activities set the context and the tone for the group work and collaboration to follow. These activities require each participant to be present, seen, and heard. Checking-in emphasises presence, focus, and group commitment.



**Table 5: Check-in activities**

Activity	Description
<i>Peer Introduction</i>	This is an activity where the participants do not already know one another. The group is split into pairs and tasked with finding out basic information about the other person (e.g., their name, organisation, interests). Each participant then introduces their partner to the full group (Caroli & Caetano, 2015).
<i>Punctual Paulo</i>	This activity is to help people remember each other's names. Both participants and facilitators sit in a circle and are asked to think of an adjective that starts with the same letter as their first name, e.g., Hi, I am Smart Sarah. First everyone says their own name and their adjective, then everyone takes turns to introduce the person to their right, and then to their left ( <i>Ibid.</i> ).
<i>Stand up if ...</i>	In this activity, a series of 10-15 statements is read to the group, participants to whom the statement applies stand up. This allows the group to learn some interesting (and occasionally funny) facts about each other. Moreover, it helps to develop an awareness of the similarities and differences in the group (Palmer, 2017).
The Graffiti Wall	This activity introduces a topic in a broad manner. A general question is posed to participants on arrival such as ' <i>how can support be best provided to those in energy poverty?</i> ' They are provided with sticky notes to anonymously and creatively express their ideas and build on the responses of others (Stuart <i>et al.</i> , 2015)

Team building activities, examples of which are shown in Table 6 are often a key element of workshops, they help participants to connect and bond with each other. Such activities motivate people to work together, to develop their strengths, and to address any weaknesses and in so doing encourage collaboration. Moreover, they build help establish and maintain trust in the group.

**Table 6: Team-building activities**

Activity	Description
<i>Meet Your Neighbours</i>	This is a means for visualising participants and exploring their connections with each other, other teams, external stakeholders, and the systems surrounding the team. Developing a better understanding of these relationships, including their external interactions, will support greater collaboration (Caroli & Caetano, 2015).
<i>Understanding Group Knowledge</i>	Participants are asked to list all knowledge and abilities a team like theirs should have. Following a group discussion, the identified items are then grouped in four quadrants: <ul style="list-style-type: none"> <li>– We know that we know – clear to all that we have this knowledge.</li> <li>– We didn't know that we knew – knowledge existed in the group, but all knew.</li> <li>– We didn't know that we didn't know – knowledge not in the group, no one knew.</li> <li>– We know that we don't know – knowledge not in the group, but aware of it.</li> </ul> This allows action items for improving the team's knowledge to be agreed upon (Caroli & Caetano, 2015).

Idea generation and innovation are important activities of workshops, and such creativity is often a central part of achieving the aims and objectives of the session. Table 7 below comprises a description of some selected activities for ideation & creation in workshop settings.

**Table 7: Ideation & creation activities**

Activity	Description
Brainstorming	The purpose of this activity is to generate ideas rather than to analyse or make decisions. Brainstorming has four key characteristics: (1) withhold judgment of ideas, (2) encourage wild ideas, (3) generate a high quantity of ideas, and (4) combine and improve ideas (Osborn, 1957 cited in Murphy <i>et al.</i> , 2023). This approach encourages out-of-the-box thinking and is focused on quantities of ideas rather than quality.
Hackathon	This structured group brain-storming exercise originated in the IT sector. It has since spread and evolved, in its most common manifestations it brings people – often from different backgrounds – together for short intensive, usually face-to-face, session (24h being a common) to solve a specific problem (Rys, 2023).
Mind-mapping	Starting at a central key word and branching outwards, Mind Maps are a way of organising information (and prompting imagination) in real time using curved lines, symbols, words, and images according to a set of intuitive rules. The use of connections between the branches helps to further ideation through association. The result in a memorable diagram that works in line with the human brain (Buzan, 2005).
World Café	This activity involves multiple rounds of conversation of 10-20 minutes. Four to five participants are seated together; they are set questions that genuinely matter to people's life, work, and community. Participants are encouraged to draw key ideas on large sheets of paper. After each round of conversation, one person remains at the table as 'table host'. The others serve as 'ambassadors of meaning' carrying ideas into their new conversations. This approach provides opportunities for linking and connect ideas between the tables (World Café Community Foundation 2015).

Table 8 below outlines the details of some problem-solving activities that could be used in the context of a workshop. These activities help in developing capacity to solve problems. They offer a step-by-step process to analysis problems and devise appropriate responses.

**Table 8: Problem-solving activities**

Activity	Description
Fishbone Diagram	Fishbone or Ishikawa Diagrams are causal diagrams created by Kaoru Ishikawa that show the potential causes of a problem. A horizontal line is drawn in the centre of a page, with the focal problem written as the head of the fish. Above and below the horizontal line series of lines are drawn at 45°. Key factors are written at the top of each of these lines, subsidiary factors detailed on lines angled from those lines (Wong <i>et al.</i> , 2016).
Five Whys	This technique (developed in the Toyota company) aims to help understand the root causes of a problem, not just the symptoms so that corrections can be made. Simply put, one begins at the end result, reflect on what caused that, and repeat this query on the result five times. The technique is dependent on accurate complete statement of problem; complete honesty in answering; & determination to get to the bottom of problems and resolve them (Serrat, 2017).

Once ideas have been generated and/or resolutions to problems, they need to be analysed, filtered and ranked. The table below describes some useful approaches to evaluating candidate ideas or options for action.

**Table 9: Filtering and ranking activities**

Activity	Description
SWOT Analysis	This activity comprises a consideration of the internal and external factors that are favourable and unfavourable to achieving the objectives of a proposed undertaking. Often organised in a two-by-two matrix, strengths and weaknesses are usually considered internal, while opportunities and threats are usually considered external (Leigh, 2009). A template for SWOT analysis is included as Appendix 8.
Retrospective consideration	In this type of analysis, participants are requested to consider past activities and grade them on their success or failure. This can take several forms <i>e.g.</i> , KALM retrospection – <u>K</u> eeP these elements that worked well; <u>A</u> dd new elements that would be of value; <u>L</u> ess of those elements that are seen to be problematic; <u>M</u> ore of those things that are seen to work well but could benefit from more (Caroli & Caetano 2015).
Feasible–Useful graph	This analysis provides a means of prioritising a list through relative comparison. A graph is drawn with usefulness on the X-axis and feasibility on the Y-axis. Each participant is asked to grade each item and place them on the graph, positioned in terms of how realistic it is and its potential effectiveness. Those ranked high in both criteria are retained for further analysis (Caroli & Caetano 2015).
Reactions	This activity is typically used for focusing the conversation on fewer items. Each discussion item is listed on an individual sticky note. The facilitator explains the ratings to be used during the exercise ( <i>e.g.</i> , 1, 2, 3, 4, 5, 6, 7, 8, 9, 10, 11, 12, 13, 14, 15, 16, 17, 18, 19, 20, 21, 22, 23, 24, 25, 26, 27, 28, 29, 30, 31, 32, 33, 34, 35, 36, 37, 38, 39, 40, 41, 42, 43, 44, 45, 46, 47, 48, 49, 50, 51, 52, 53, 54, 55, 56, 57, 58, 59, 60, 61, 62, 63, 64, 65, 66, 67, 68, 69, 70, 71, 72, 73, 74, 75, 76, 77, 78, 79, 80, 81, 82, 83, 84, 85, 86, 87, 88, 89, 90, 91, 92, 93, 94, 95, 96, 97, 98, 99, 100). Participants are requested to add their reactions to each of the notes. The reactions are acknowledged and discussed in a group setting, fostering a conversation about what is important to each person. This activity is typically used for focusing the conversation on fewer items with highest number of reactions (Caroli & Caetano 2015).
Balance sheet	This is a useful activity to evaluate and compare different options for action. A line is drawn in the centre of a large sheet of paper. Participants suggest advantages (written on the left of the line) and disadvantages (to the right of the line). Each of the suggestions are graded by the group on a scale of 1 to 5. The scores for each side are totalled to evaluate the options (Cameron, 2005).

The final part of the workshop comprise check-out activities, such as those included in Table 10 below. Cohen (2023) advises that ‘People disproportionately remember the last few minutes of a meeting. Attend to logistics first, and then close with a check-out or another powerful activity’. The check-out process is a counterpart to the initial check-in stage and just as fundamental to workshop process. Again, each participant is invited to be present, seen, and heard. While the check-in activities emphasised presence, focus, and group commitment, checking-out emphasises reflection and closure. Table 10 below provides information on several selected workshop check-out activities.

**Table 10: Check-out activities**

Activity	Description
<i>Following up on action items</i>	This is used to organise an action list arising from the discussions. New action items identified during the workshop are added to previously identified items. Items on the list are noted as new, pending, closed or dropped. Finally, each new task is assigned an owner and a due date.
<i>A fun thing ...</i>	As the session is coming to a close, participants are asked to talk briefly about something fun they will do this week. The responses are added to a whiteboard and people are invited to add more information if they wish. This activity is intended to be a friendly prompt for people to share a little about stuff that they really enjoy. In so doing ending the session in a fun manner, while helping in team building.
<i>One last word</i>	Participants are asked to write one word on a sticky note describing their feelings as the meeting is concluding. The sticky notes are post on a wall for all to see before leaving the workshop. The aim is to get (ideally) more motivated attendees to share their good feelings with other participants.
<i>Fun photo</i>	Participants are requested to prepare for a fun photo – this could be based on funny faces, crazy walks, gestures, costumes, <i>etc.</i> The photograph is taken and shared with participants as a memento of the workshop, helping to lighten the mood and build morale for future tasks.

### 3.4 Process summary

The process for workshop organisation can be summarised in seven steps are briefly outlined below.

1. Identify target audience – the format and structure of the workshop should align with the target audience, and with the objectives established for the event.
2. Choose appropriate topic – the topic selected for the workshop should be pertinent and timely for the target audience. The content (and experts) should be selected to maximise its relevance for, and attractiveness to, the target audience.
3. Define expected outcomes – People choose to attend based on perceived value. Clearly define the outcomes and impacts of the workshop will help to position it amongst prospective attendees.
4. Define event programme – a well-structured programme (with varied activities) will attract participants, keep them motivated and focused during the event and ensure they get value from their participation.
5. Send invites and arrange registration – in the last number of years this has all moved online. Services such as Eventbrite offer an efficient means of both promoting the event and managing registration.
6. Host workshop – arrange for the workshop to be facilitated effectively to ensure efficient flow of the event, good time-keeping, and productive collaboration.
7. Get feedback – use feedback forms (or online surveys) to measure satisfaction, identify areas of improvement, collect data for planning, and gauge interest for future workshops.

## 4 BM workshop for innovation in energy poverty support

Informed by the information and guidance on workshops included in the preceding Section 0, and drawing on the information about business models discussed in Section 2, this section sets out a programme for a workshop for those working to support energy poor households. The programme for user-centred workshops detailed in the following pages, will aim to use business models concepts and planning tools to support the development (and/or tailoring) of innovative support schemes addressing energy poverty.

### 4.1 Workshop outline

<b>Agenda – One day workshop</b> <b>Using business model concepts to devise innovative support schemes</b> <b>for energy poor households</b>	
10:00	Welcome & Introductions
10:05	Reflective Discussion
10:25	Overview of the Business Model Canvas and Mission Model Canvas
11:15	Live Canvas Example
11:25	Reflection and debrief
11:35	Energiser
11:55	Introducing Beneficiaries & Value Proposition
12:15	Value Proposition Activity
12:35	Individual Presentations & Feedback
12:50	Intro to Deployment, Buy-in & support, and Mission Achievement
13:10	Participant presentations
13:30	LUNCH
14:10	Energiser
14:20	Intro to Key Resources, Key Activities, Key Partners & Mission Budget
14:30	Working in Pairs
15:30	BREAK
15:40	Individual Prep
15:50	Final Canvas Presentations
16:00	Reflective Discussion
16:10	Conclusion

The above agenda is based on a template from [sessionlab.com](https://sessionlab.com)

## 4.2 Workshop detail

### (1) Welcome & Introduction

- Coffee provided 15-20 minutes before start time to encourage punctuality.
- Workshop facilitator(s) introduces themselves and explains the objective of the session.
- Ground rules for the session (previously circulated) are quickly recapped (see Appendix 1).
- *Peer introduction*: The group is split into pairs and tasked with finding out basic information about the other person. Each participant then introduces their partner to the full group.
- 5-10 minutes.

### (2) Reflective Discussion

- Facilitator initiates discussion with the following question prompts:
  - What's the main challenge you've encountered in making progress with your project idea?
  - How effective are you at communicating this idea to others?
  - What would help you to further your progress and communicate your idea more effectively?
- 20 minutes.

### (3) Overview of the Business Model Canvas and Mission Model Canvas

- Using the previous shared challenges, facilitator provides a brief overview of the BM Canvas, the MM Canvas and their purpose.
- Facilitator shows both canvases and mentions the names of nine building blocks of each (pointing out the differences between the BM canvas and MM canvas).
- 10 minutes.

### (4) Live Canvas Example

- The group is tasked with working on a live example. They are asked to decide on one non-profit entity that they're all familiar with, and to which they can all relate to.
- Each of the nine building blocks of the MM canvas<sup>10</sup> (see Appendix 2) are explained in turn and participants are invited to record on sticky notes for each in the following order: Beneficiaries; Value proposition; Deployment; Buy-in & support; Mission Achievement; Key resources; Key activities; Key partners; Mission Budget.
- The completed Mission Model Canvas is reviewed and discussed by the group.
- 50–60 minutes.

### (5) Reflection and debrief

- Participants are prompted to reflect on their learning thus far and brainstorm benefits of using the MM Canvas using the Graffiti Wall mentioned on page 17.
- 10 minutes.

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<sup>10</sup> Available to download from <https://www.strategyzer.com/library/the-business-model-canvas> and <https://www.strategyzer.com/library/the-mission-model-canvas> respectively.

(6) Energiser

- 10 minute exercise to raise energy levels & encourage engagement, see also page 16.
- e.g., Who am I: Names of famous people or characters are written on sticky notes and stuck to participants' foreheads (so they cannot see who they are). People attempt to guess their own identity by asking Yes or No questions.

(7) Introducing Beneficiaries & Value Proposition

- Facilitator explains what a beneficiary is and asks participants why it is important to identify target beneficiaries.
- Facilitator explains what the value proposition is and the value proposition canvas<sup>11</sup> introduced.
- Participants are invited to give their perspectives on value proposition.
- 15–20 minutes.

(8) Value Proposition Activity

- Participants are asked to focus to their own initiative idea, brainstorming profiles of one or two beneficiaries they could serve and the associated value proposition for each one.
- Next, they are asked to select only one beneficiary they will work on for the rest of the workshop and create the corresponding value proposition using the VP Canvas & sticky notes.
- 20-30 Minutes.

(9) Individual Presentations & Feedback

- Participants are invited to present their chosen beneficiary and value proposition to the group.
- The group provides feedback on the presentations as time allows.
- 15 minutes.

(10) Deployment, Buy-in & support, and Mission Achievement

- The facilitator explains the Deployment, Buy-in & support, and Mission Achievement building blocks of the MM canvas, giving appropriate examples.
- 10 minutes

(11) Small group presentations

- Depending on numbers, participants form groups of three or four, where they recap and present their understanding (this far) of the MM Canvas.
- As time permits, the groups discuss the MM canvas and its component building blocks.
- 20 minutes

(12) Lunch of c. 40 minutes, with participants dining together and conversing informally.

(13) Energiser

- 10 min exercise after lunch to raise energy levels and encourage engagement, see also page 16.

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<sup>11</sup> Available to download from <https://www.strategyzer.com/library/the-value-proposition-canvas>

- *e.g., People Bingo*: Participants are provided with bingo cards in which each square contains various characteristics. (*e.g., has two siblings, lives in an apartment, is afraid of flying*) Everyone mingles asking each other questions attempting to get a full house.

(14) Intro to Key Resources, Key Activities, Key Partners & Mission Budget/Cost

- The facilitator explains each of the final four elements, giving appropriate examples.
- 10 Minutes.

(15) Working in Pairs

- Divide group into pairs, one person prompting the other, until both complete the final four sections using sticky notes.
- 60 Minutes.

(16) Coffee Break of c.10 Minutes

(17) Individual Preparation

- Participants are given some time to prepare presentations of their MM canvas to deliver to the group.
- 10 minutes.

(18) Final MM Canvas Presentations

- Up to 3 minutes per person for the presentation.
- Questions and feedback from the other participants encouraged after every presentation.
- 10–15 Minutes.

(19) Reflective Discussion

- Ask the group to reflect on and share: What's one takeaway from today's workshop? How else can a MM Canvas support your progress as you go forward with this project/initiative?
- 10 Minutes.

(20) Conclusion

- Wrap up workshop, seek feedback (see Appendix 5) extend gratitude, and close.
- 5–10 Minutes.

### **4.3 Online workshops**

Business model workshops are typically delivered in face-to-face settings, as envisaged in the workshop programme described in the previous sections. Such in-person settings enable and (in the right circumstances) support productive collaboration amongst attendees, often resulting on cross-fertilisation (and even the amalgamation) of ideas. However, notwithstanding the advantages of physical gatherings, workshops to support business model innovation can be held virtually. Indeed the programmes outlined earlier could be pivoted to an online delivery with little (if any adaption) through the use of online tools such as Sessionlab for workshop planning ([www.sessionlab.com](http://www.sessionlab.com)); Miro for online whiteboard ([www.miro.com](http://www.miro.com)); Slido for engagement ([www.slido.com](http://www.slido.com)); Stormz for virtual facilitation ([www.stormz.me](http://www.stormz.me)); Welo for virtual space ([www.welo.space](http://www.welo.space)); Canvanizer for online Business Model & Mission Model Canvas development ([canvanizer.com](http://canvanizer.com)).



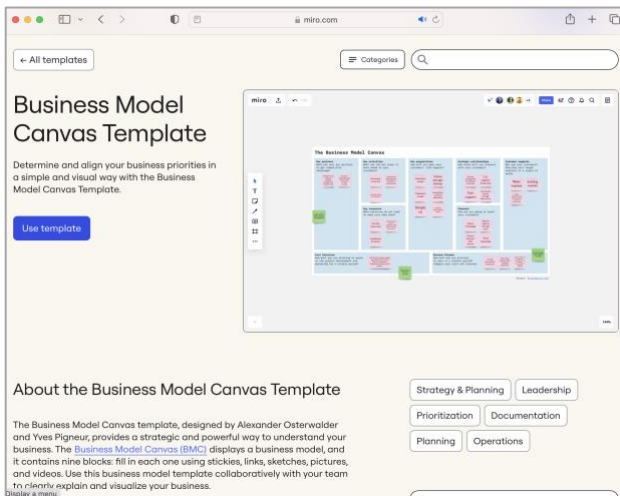


Figure 5: BM Canvas template on Miro

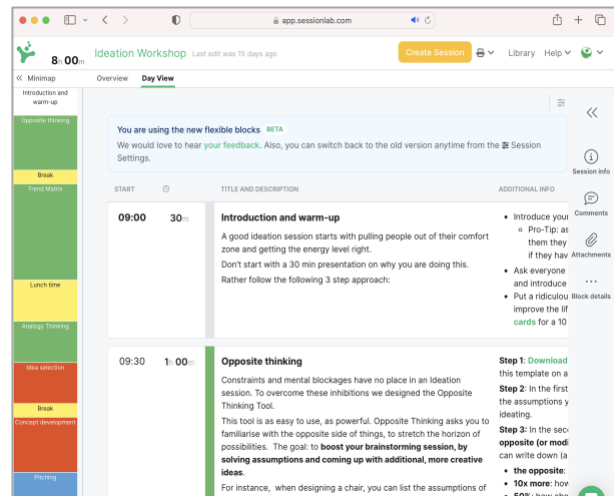


Figure 6: Ideation workshop agenda on Sessionlab

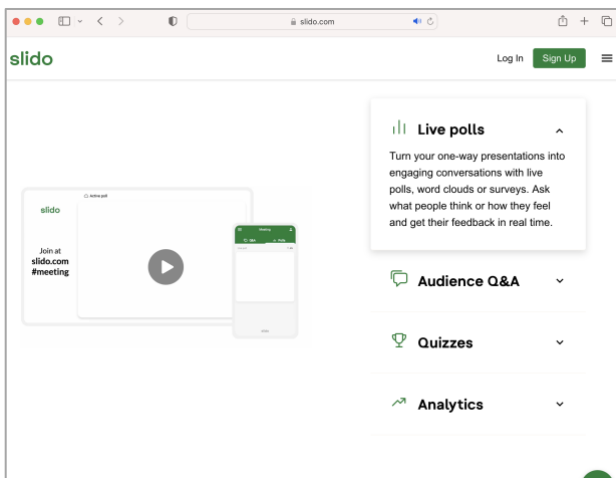


Figure 7: Engagement options on Slido

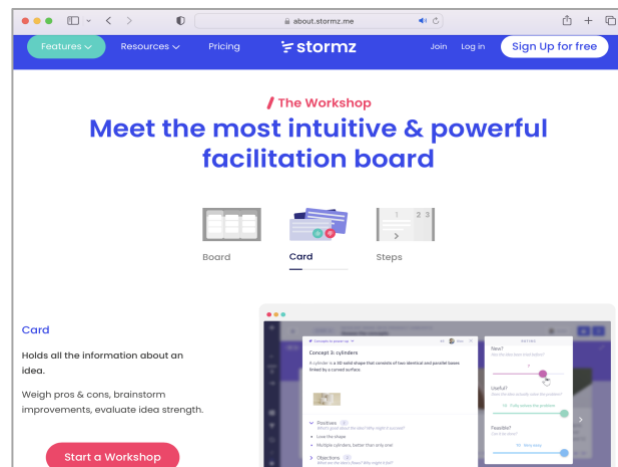


Figure 8: Stormz Virtual facilitation platform

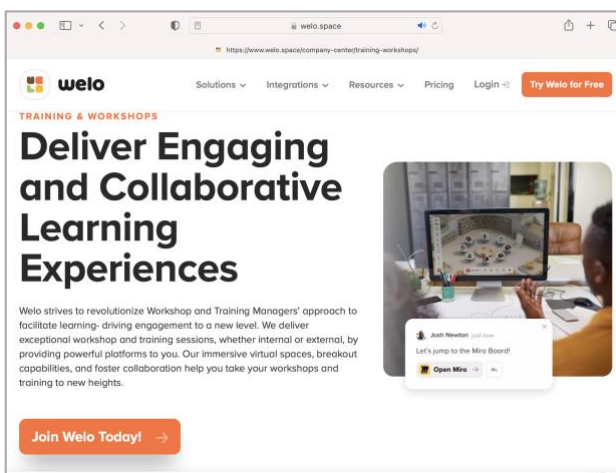


Figure 9: Welo virtual space offerings

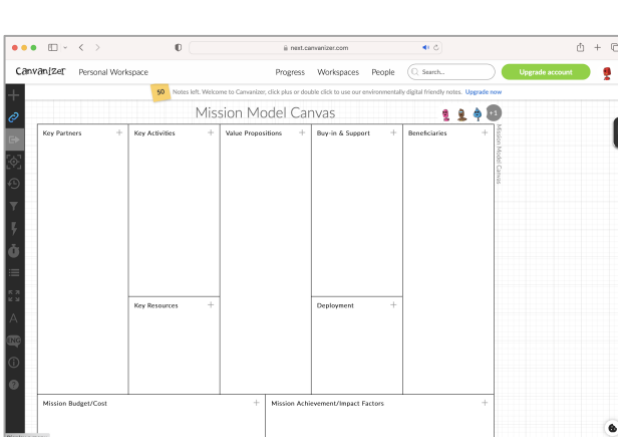


Figure 10: Mission model canvas on Canvanizer

## 5 Conclusions

This report provides guidelines and resources for planning and delivering user-centred business modelling workshops for those working to support energy poor households. The forwarded workshop programme was designed to: provide information on business model innovation and value creation; support participants to become familiar with business model tools (specifically the value proposition canvas and the mission model canvas); and to use this developed knowledge to work through value proposition definition and Mission Model development. These guided exercises and group work would serve to reinforce and test the knowledge transfer in the workshop.

This report also includes a treatment of business models and discusses significant tools for developing business models, namely: the Value Proposition Canvas, Business Model Canvas, and the Mission Model Canvas (a derivative of the BM Canvas designed for so-called mission orientated organisations including non-profit initiatives). In addition, resources for the development of Business Model / Mission Model are included as Appendix 6, and resources for workshop facilitation as Appendix 7 (while tools for online workshop facilitation are listed in section 4.3).

Finally, several lessons drawn from the preparation of this report relevant to the realisation of workshop objectives are presented below.

- **Start strong, but end stronger.** This is for two reasons. Firstly, people remember both the beginning and the end of an event due to primacy bias and recency bias. Secondly following the peak end rule<sup>12</sup>, which is influenced by this bias hold that people will remember one peak and the end of any experience.
- **Manage expectations.** To ensure participants are happy with the event, their expectations need to be managed. This involves clearly setting out and communicating the purpose of the meeting, envisaged content and activities, and expected outcomes.
- **Be mindful of participants' comfort.** As Drinkwater (2020, p. 62) observes 'a stressed delegate is a disengaged delegate', to encourage greater participation facilitator should consider comfort factors in the planning and realisation of workshop. This should include *e.g.*, dietary requirements, accessibility needs, layout and seating, room temperature, refreshments and food, sticking to break schedule, *etc.*
- **Show, don't tell.** Offer straightforward but relatable examples during the workshop, so participants better understand the content. On a related note, during practical exercises move around the groups and talk with them as they work offering guidance and assistance as needed.
- **Don't overload.** Plan the workshop session so that there is sufficient time for breaks, energisers, and other exercisers, and to ensure that content is not squeezed in. Workshops require a lot of mental effort and can be deceptively taxing on people.

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<sup>12</sup> The peak–end rule is a psychological heuristic in which people judge an experience largely based on how they felt at its peak and at its end.

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## **Appendix 1 – Workshop ground rules**

1. Attend the workshop with positive expectations.
2. Arrive on time for the workshop, return on time after breaks.
3. Discuss ideas, not people.
4. Be engaged, but do not dominate the discussion.
5. Be present, or be elsewhere.
6. Be inclusive and encourage others to participate.
7. Keep an open mind toward other people's suggestions.
8. Avoid side conversations.
9. Listen to others and respect different points of view.
10. Handle conflicts during discussions in a healthy way.

Appendix 2 – Business model canvas

Designed for:

Designed by:


Date:

Version:


# The Business Model Canvas

Key Partnerships	Key Activities	Value Propositions	Customer Relationships	Customer Segments	Revenue Streams	Cost Structure

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Available to download from <https://www.strategyzer.com/library/the-business-model-canvas>

## Appendix 3 – Mission model canvas

# The Mission Model Canvas

Mission/Problem description:

Designed by:

Date:

Version:

Key Partners	Key Activities	Value Propositions	Buy-in & Support	Beneficiaries
	Key Resources		Deployment	
Mission Budget/Cost		Mission Achievement/Impact Factors		

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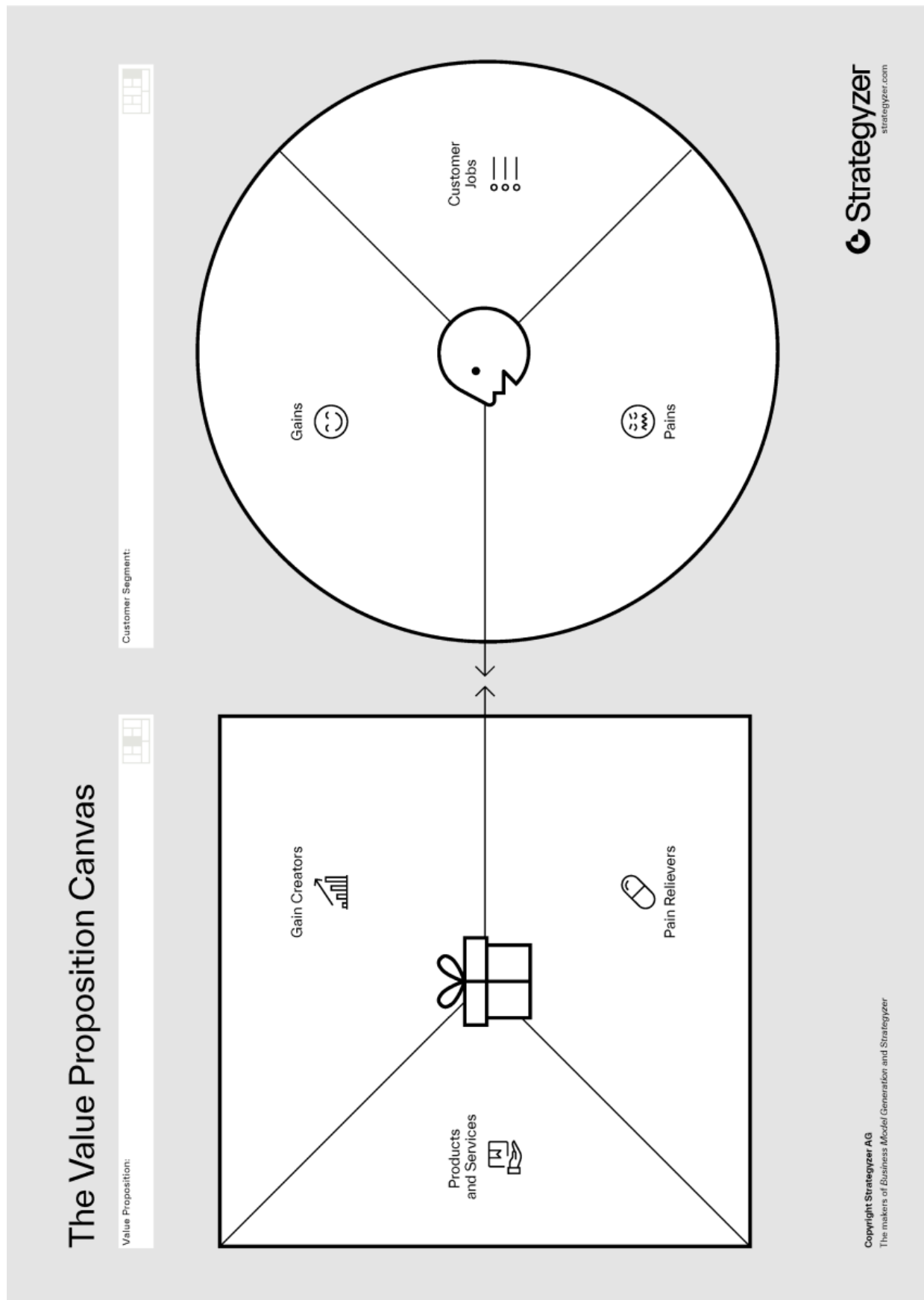
Designed by **Strategizer AG & Steve Blank**  
 The makers of *Business Model Generation* and *Strategizer*

**Strategizer**  
 strategizer.com

Available to download from <https://www.strategyzer.com/library/the-mission-model-canvas>



## Appendix 4 – Value proposition canvas



Available to download from <https://www.strategyzer.com/library/the-value-proposition-canvas>

## Appendix 5 – Workshop feedback survey

1. What is your overall assessment of the workshop? (on a scale of 1-5)

1	2	3	4	5
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insufficient ----- excellent

2. Did the workshop meet your expectations?

☐ Yes

☐ No

3. Which topics or aspects of the workshop did you find most interesting or useful?

4. How do you think the workshop could have been made more effective?

5. Would you recommend this workshop to others?

☐ Yes

☐ No

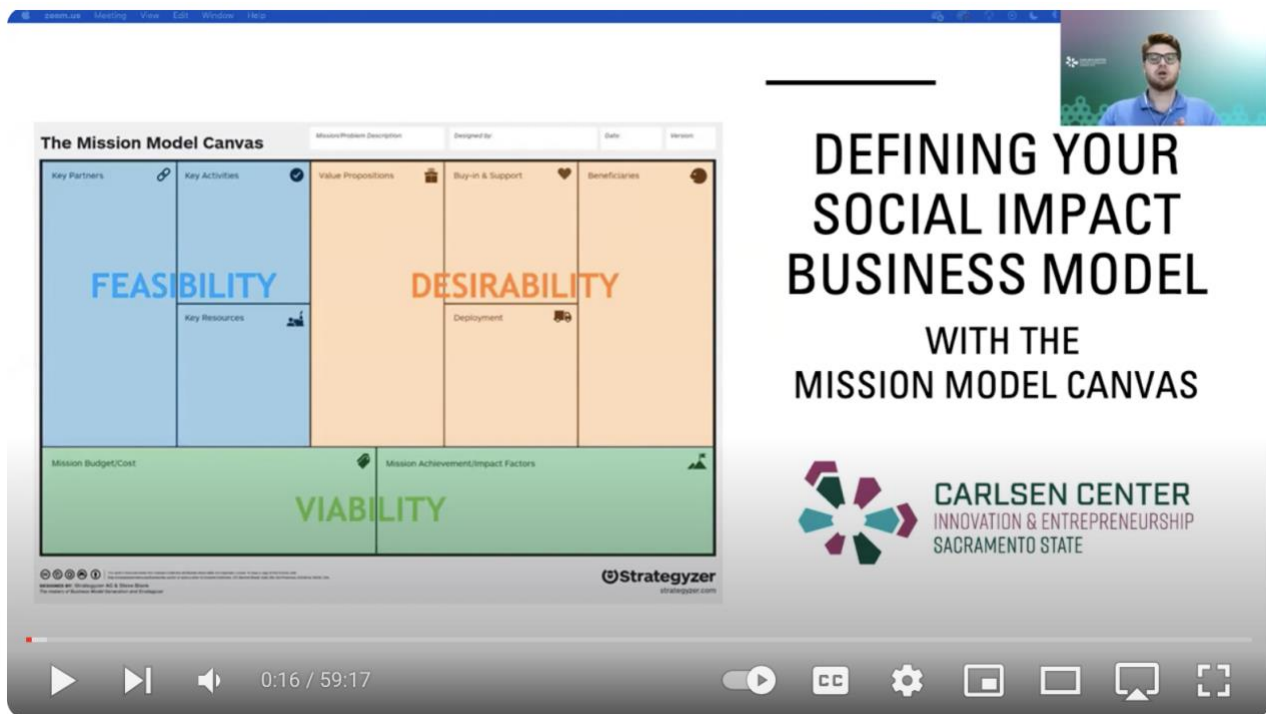
## Appendix 6 – Business model resources



A three-minute video explaining the Value Proposition Canvas (used in conjunction with BM & MM Canvases) available to view at <https://www.youtube.com/watch?v=ReM1uqmVfP0>



A brief video providing a two-minute overview of Osterwalder's Business Model Canvas, available to view at <https://www.youtube.com/watch?v=QoAOzMTLP5s>



An hour-long video detailing the use of the Mission Model Canvas to develop a socially orientated business model, available to view at <https://www.youtube.com/watch?v=v1OCWQ92xNA>

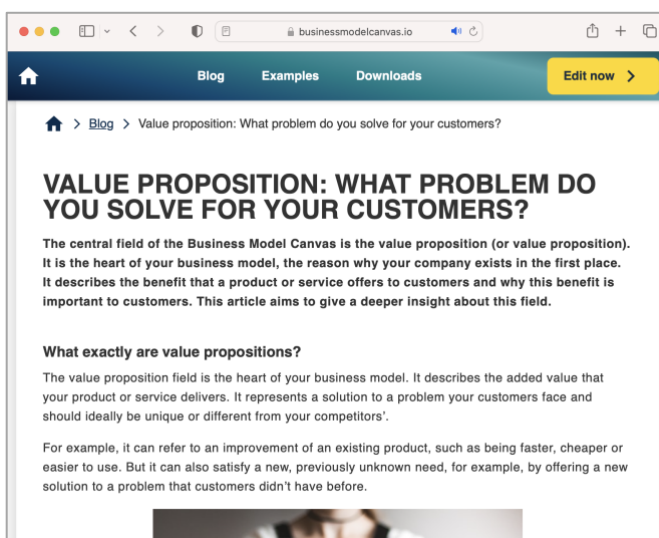


An hour-long video from Strategyzer AG on mastering value propositions, which covers the VP canvas, available to view from <https://www.youtube.com/watch?v=35ST-37PPXc>



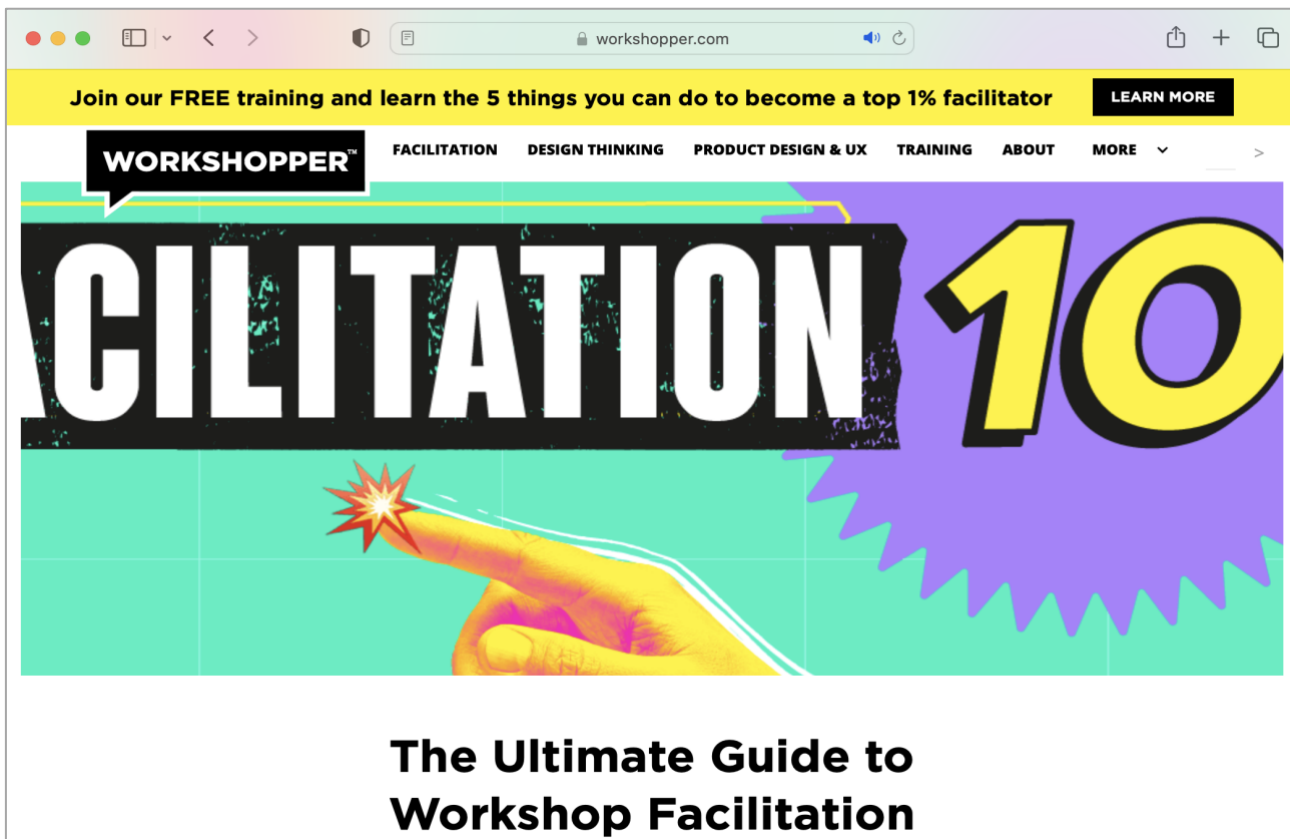
A collection of short videos introducing the Mission Model Canvas by one of its co-developers Steve Blank

Introduction to the Mission Model Canvas (2:19)	<a href="https://www.youtube.com/watch?v=8_FfL9rrn8Q">https://www.youtube.com/watch?v=8_FfL9rrn8Q</a>
Beneficiaries & Stakeholders (2:49)	<a href="https://www.youtube.com/watch?v=tqOlz8pr5sc">https://www.youtube.com/watch?v=tqOlz8pr5sc</a>
Value Proposition (1:33)	<a href="https://www.youtube.com/watch?v=jRv90FDn5cE">https://www.youtube.com/watch?v=jRv90FDn5cE</a>
Buy-In (1:35)	<a href="https://www.youtube.com/watch?v=Bfpp5tgnwcw">https://www.youtube.com/watch?v=Bfpp5tgnwcw</a>
Deployment (1:26)	<a href="https://www.youtube.com/watch?v=L1i37Qq04WY">https://www.youtube.com/watch?v=L1i37Qq04WY</a>
Mission Achievement (1:16)	<a href="https://www.youtube.com/watch?v=fcduXrKov5A">https://www.youtube.com/watch?v=fcduXrKov5A</a>
Key Activities (0:53)	<a href="https://www.youtube.com/watch?v=q_wm6aJomZ8">https://www.youtube.com/watch?v=q_wm6aJomZ8</a>
Key Resources (0:37)	<a href="https://www.youtube.com/watch?v=nhooT19I-yQ">https://www.youtube.com/watch?v=nhooT19I-yQ</a>
Partners (0:57)	<a href="https://www.youtube.com/watch?v=Fcyqd5mJslc">https://www.youtube.com/watch?v=Fcyqd5mJslc</a>
Mission Budget (1:17)	<a href="https://www.youtube.com/watch?v=KTtGs7up8Ak">https://www.youtube.com/watch?v=KTtGs7up8Ak</a>
Key Concepts (2:44)	<a href="https://www.youtube.com/watch?v=t_DXrB77MA">https://www.youtube.com/watch?v=t_DXrB77MA</a>

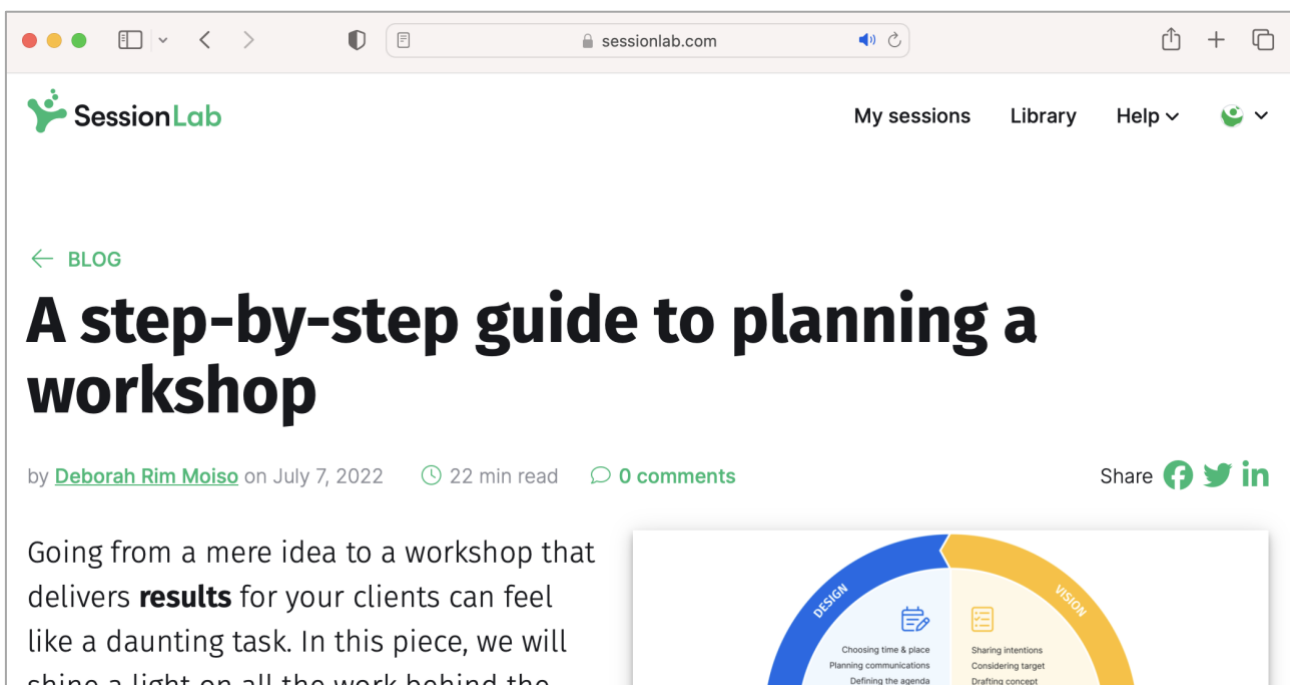


Blog post on value propositions available at  
<https://businessmodelcanvas.io/en/blog/posts/value-propositions/>

## Appendix 7 – Workshop facilitator resources



'The Ultimate Guide to Workshop Facilitation.' Blog post from Workshopper available to read at <https://www.workshopper.com/post/the-ultimate-guide-to-facilitation>



'A step-by-step guide to planning a workshop,' Blog post from Session Lab available to read at <https://www.sessionlab.com/blog/planning-a-workshop/>

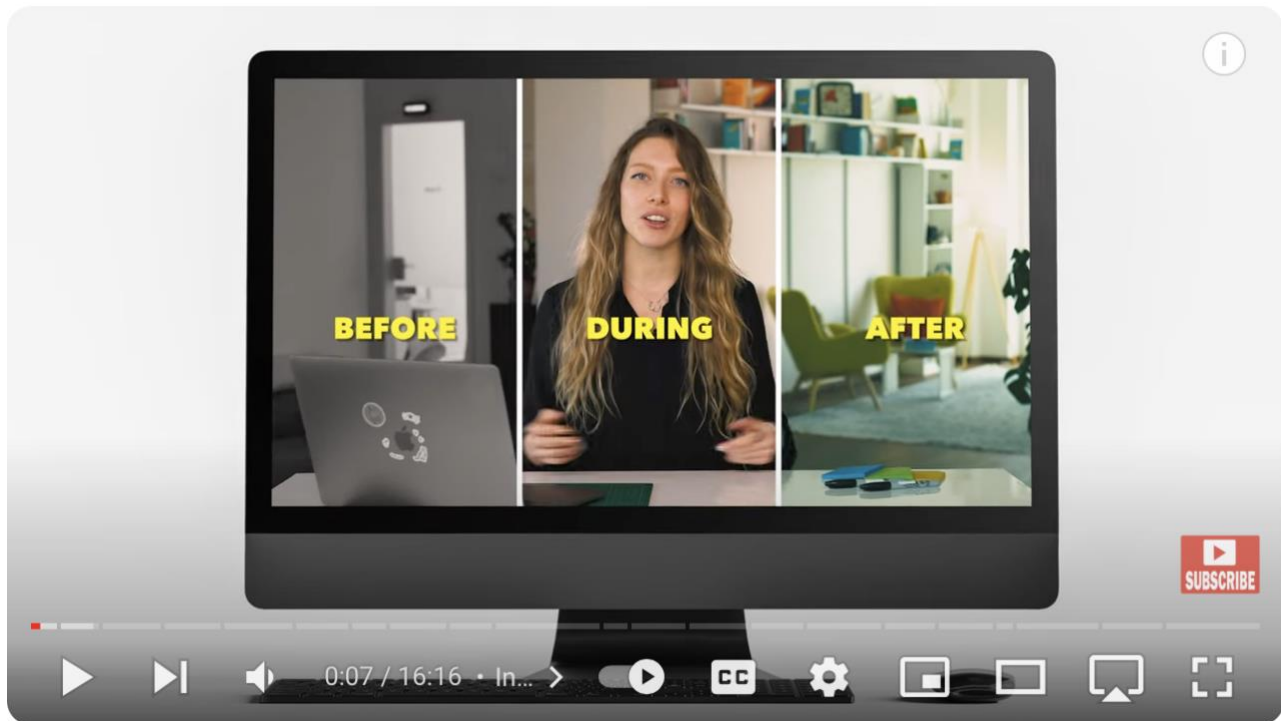




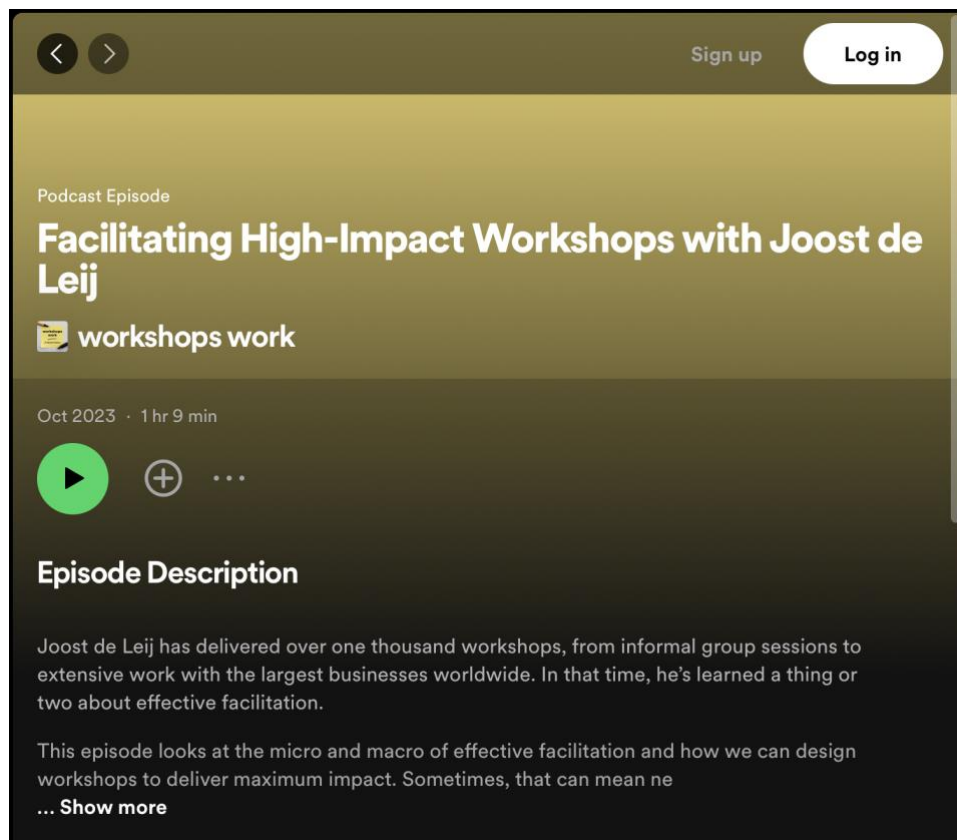
'Facilitation 101: Everything You Need to Know.' An 8-minute video explaining the basics of facilitation. Available to view at <https://www.youtube.com/watch?v=Yi6ydxA5Qg>



'Five Practical Tips on Workshop Facilitation.' An 8-minute video from Relab studios. Available to view at <https://www.youtube.com/watch?v=yscDrST8Evo>



‘How To Be A Great Facilitator - Top Facilitation Techniques For Amazing Remote Workshops,’ A 16-minute video available to view at <https://www.youtube.com/watch?v=JsRxFOI3eal>







‘Facilitating high Impacting workshops with Joost de Leij’, an episode of the ‘Workshops Work’ podcast available to listen at <https://open.spotify.com/episode/6Cl6NHPTaTR40Xd87bSZVJ>




## Appendix 8 – SWOT analysis template

SWOT Analysis

 <h3 style="text-align: center;">Weaknesses</h3>	 <h3 style="text-align: center;">Threats</h3>
 <h3 style="text-align: center;">Strengths</h3>	 <h3 style="text-align: center;">Opportunities</h3>

More templates at [facilitator.school/templates](https://www.facilitator.school/templates)

Based on "SWOT Analysis" by Albert Humphrey

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Available for download from <https://www.facilitator.school/template/swot-analysis>