

The degree to which the social model* addresses the customer's needs:	ASSESSING YOUR SOCIAL MODEL'S IMPACT ON CUSTOMER NEEDS		ASSESSING YOUR SOCIAL MODEL'S IMPACT ON COSTS & PRICING	How the social model impacts costs & pricing:
<p>The social model does not have a role in addressing the customer's needs, but the purchase funds the social model (often there is a customer desire to 'buy social').</p> <div><input type="checkbox"/> <i>Planning prognosis:</i></div> <p>definite challenges ahead (the pressure of 'multi-tasking', the pressure of customer persuasion)</p>	<div>YOUR SOCIAL MISSION:</div> <div>YOUR SOCIAL MODEL:</div> <div>THE CUSTOMER NEEDS YOU ARE ADDRESSING:</div> <div>BEYOND A CUSTOMER 'BUYING SOCIAL', COULD YOUR SOCIAL MODEL'S ROLE IN ADDRESSING THE CUSTOMER'S NEEDS BE REPLACED BY A 'TRADITIONAL BUSINESS' (I.E. ONE THAT DOES NOT USE YOUR SOCIAL MODEL)?</div>		<div>WHAT COSTS DOES YOUR SOCIAL MODEL ADD TO YOUR VENTURE?</div> <div>CAN YOU PASS THOSE COSTS ON TO YOUR CUSTOMER?</div> <div>BEYOND A CUSTOMER 'BUYING SOCIAL', HOW DOES YOUR SOCIAL MODEL ENHANCE THE VALUE OF YOUR PRODUCT/SERVICES?</div> <div>IF YOUR SOCIAL MODEL DOES ENHANCE THE VALUE OF YOUR PRODUCT/SERVICES, IS YOUR CUSTOMER WILLING AND ABLE TO PAY MORE FOR THAT ENHANCED VALUE?</div>	<p>The social model adds costs that can't be passed on to the customer.</p> <div><input type="checkbox"/> <i>Planning prognosis:</i></div> <p>definite challenges ahead (the pressure of the funding gap).</p> <p>The social model adds costs that can be passed on to the customer.</p> <div><input type="checkbox"/> <i>Planning prognosis:</i></div> <p>possible momentum (the security of affordability).</p> <p>While the social model may add costs that can be passed on to the customer, it also enhances value in a way that the customer is willing and able to pay more for (over and above any desire to 'buy social').</p> <div><input type="checkbox"/> <i>Planning prognosis:</i></div> <p>definite momentum (the power of enhanced value the customer is willing & able to pay more for).</p>
	<div><input checked="" type="checkbox"/> BASED ON THE ABOVE, CHECK THE LEFT-HAND CELL THAT FITS YOUR VENTURE</div>		<div><input checked="" type="checkbox"/> BASED ON THE ABOVE, CHECK THE RIGHT-HAND CELL THAT FITS YOUR VENTURE</div>	

*"Social mission": the social good the social enterprise wants to achieve. "Social model": how the social enterprise directly serves its social mission.

2. Finding Your ‘Early Adopter’

Click [here](#) for the primer blog to this worksheet and [here](#) for a completed example of this worksheet

* Should you have any specific questions about this worksheet, please contact us at info@tricofoundation.ca *

Check out our core concept resources on [Key Mindsets](#) & [Customer and Beneficiary Distinction](#) as a foundation for this worksheet

Questions	Step 1: Answers (complete all answers before moving to Step 2)	Step 2: Probing (Productive Paranoia) a) Make sure you have all key details and have tried to be specific. Are you overlooking anything that will be key to your venture? b) How would a skeptic challenge you on your Step 1 answers?
1) Describe your customers		
2) Within your customers, which sub-group would be the most excited		

about what you are providing/is most annoyed by the problem you are solving?		
3) Within your customers, which sub-group is most open to talking about this problem and trying new solutions?		
4) Within your customers, which sub-group has the most influence over your other customers (i.e. who is seen as an authority on the customer problem your product is addressing)?		

<p>5) Which sub-group shares all of the characteristics (or the most) described in 2 to 4? (That is your 'early adopter' customer segment)</p>		
<p>6) How many are in your 'early adopter' customer segment?</p>		
<p>7) How is your 'early adopter' customer currently coping with the problem your product/service addresses (be specific):</p> <p>a) How do they cope?</p>		

b) When do they? c) Where do they? d) How much do they pay?		
8) In terms of their current coping, what annoys them?		
9) In terms of their current coping, what are they happy with?		

Reflection & Feedback

For more information on selecting stakeholders and making the most of those conversations, please check out our blogs on [effective learning](#) & [stakeholders](#)

	Name of skeptic	Date of Feedback
Feedback from a friendly, wise, skeptic:		

	Points of concern, points of excitement & advice for moving forward	Names	Date
Feedback from your team:			
Feedback from your Board:			
Feedback from your advisory group:			
Feedback from your customers:			
Feedback from any key stakeholders:			
Your thoughts about the feedback you received :			

3. The Key Steps

Click [here](#) for the primer blog to this worksheet and [here](#) for a completed example of this worksheet

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Check out our core concept resources on [Key Mindsets](#), [Customer and Beneficiary Distinction](#), & [Steady State](#), as a foundation for this worksheet.

Reminder: To complete this worksheet, think of how you would want your venture to look when it reaches its [steady state](#), identifying what 'the end game is' and what you will need when it is up and running.

<p>Column A</p> <p>Each and every step your target beneficiaries & customers must take to benefit from your offering</p>	<p>Column B</p> <p>Things your organization must do to benefit your target beneficiaries & customers (Note every time resources, skills or partners will be required and whether you have them or need to get them)</p>	<p>Column C</p> <p>After you have completed Column A and B move on to: Probing (Productive Paranoia)</p> <ul style="list-style-type: none"> a) Make sure you have all key details and have tried to be specific. Are you overlooking anything that will be key to your venture? b) How would a skeptic challenge you on your Step 1 answers?

How will you respond to competitors copying your idea?		

Reflection & Feedback

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Name of skeptic	Date of Feedback

Feedback from a friendly, wise, skeptic:	
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	Points of concern, points of excitement & advice for moving forward	Names	Date
Feedback from your team:			
Feedback from your Board:			
Feedback from your advisory group:			
Feedback from your beneficiaries:			
Feedback from your customers:			
Feedback from any key stakeholders:			

Your thoughts about the feedback you received :			
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4. Operating Costs and Core Numbers

Click [here](#) for the primer blog to this worksheet and [here](#) for a completed example of this worksheet

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Reminder: To complete this worksheet, think of how you would want your venture to look when it reaches its [steady state](#), identifying what 'the end game is' and what you will need when it is up and running.

Core Items that Set the Context for the Costs of Your Venture	Your Project
1. Unit of social impact	
2. Targeted number of social impact units per year ('yearly social impact goal')	
3. Unit of sale	
4. Annual Hours of Operation	

5. What organization would be a great example that would help you figure out your costs:

a) They are similar to your venture, especially when it comes to costs.

b) They have indicated a willingness to share information with you about their costs.

	Column A	Column B	Column C	Column D	
Type of cost (give e.g.'s) Use Key Steps worksheet as a	Unit & estimated cost per unit of input*	Source of estimate	Cost multiplier (the quantity or number of units that will be used in the venture)	Yearly cost (Column A x Column C) Note: if a cost will be financed, put an	If any cost is to be financed, note who will provide the financing. If any

guide			for a year)	asterisk beside it and include the yearly payment costs.	cost will be paid for by the time your venture reaches its stable state, simply say “paid for by year X”

				TOTAL	

**Could be things like: per unit sold, % of revenues or budget, per month or year, per person, per mile, per ton, per square foot.*

Core Numbers:	Your Project
6. Annual profit goal (Include an explanation of how you arrived at your profit goal)	
7. Yearly revenue goal (profit goal + expenses)	
8. Price of revenue generating unit	
9. Minimum number of revenue generating units that need to be sold to make your yearly <u>revenue</u> goal	
10. To meet your yearly revenue goal:	

a) number of unique customers needed per year b) the frequency of their purchases per year c) amount spent per visit	
11. Targets per hour of operation: a) number of customers b) dollar value of sales	

Reflection & Feedback

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Feedback from a friendly, wise, skeptic:		

	Points of concern, points of excitement & advice for moving forward	Names	Date
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Feedback from your advisory group:			
Feedback from your beneficiaries:			
Feedback from your customers:			
Feedback from any key stakeholders:			
Your thoughts about the feedback you received :			

5. Testing

Click [here](#) for the primer blog to this worksheet

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Zoom Out (High Level): Imagine your venture is like climbing Mount Everest. You need to build a high-level, logical trail of key stages/thresholds ('camps') between your goal (the top of the mountain) and where you are now (your 'base camp')

Step 1

Staying at a high level:

- Describe your 'steady state' – that's the top of Mount Everest you want to get to (your goal, your "why").
- Describe where you are at right now – that's your base camp.
- Between a) and b), list all the key stages/thresholds (additional camps) from where you are now to where you want your venture to be in its 'steady state'. To help keep them distinct, give each

Step 2

Staying at a high level (!), for each key stage/threshold, what makes it risky (what do you fear, how can being wrong hurt you?) and how can you de-risk it?

Step 3

Review how you have filled out this entire chart and note any major gaps (i.e. where you have no idea how you will get from one key stage to the next) or giant leaps (something that will be crucial but you don't know how you will get it). Highlight them in yellow and describe a plan to get the information you need to safely fill in those gaps or safely make those leaps.

camp its own line in this column.	

		Name of skeptic	Date of Feedback
Feedback on Steps 1 to 3, from a friendly, wise, skeptic:			

Zoom In (Detailed, Deep Dive): Now imagine you are on Mount Everest beginning your climb. You have your “zoom out” plans to guide you, but you are testing the safety of the ice right in front of you before you take your next step. Look at your immediate next key stage (‘camp’), and dig deep (test the ice) on how to de-risk the steps you will have to take to safely get to your next ‘camp’.	
Step 4 Given Steps 1, 2 and 3 above, what is your next key step?	

<p>Deeper dive on how to eliminate the risk of that step:</p> <p>a) Get as granular on that specific risk as you can, breaking it down even further into a sequence of decreasing risks that ends with either no risk or the smallest risk possible (i.e. you don't want to test the ice by jumping on it, you want to test the ice carefully)</p>		
<p>b) Identify exactly how to remove the remaining uncertainty with the least expensive, easiest and fastest test possible. Make sure you have found your 'ice tester' – a test where the results can be used to move on to your next step.</p>		
<p>c) Record the numerical results you anticipate from the test and explain how what you will learn from those results will help you move on to the next step (be specific).</p>		
<p>d) Do a quick pre-test check: Imagine the test results are half what you expected and then twice what you expected. In both cases, what specific insights would you gain that you can use to improve your efforts (make sure you won't just be jumping to conclusions).</p>		
	Name of skeptic	Date of feedback

Feedback on Step 4 (pre-test) from a friendly, wise skeptic	
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Additional Reflection & Feedback Pre-Test

	Points of concern, points of excitement & advice for moving forward (Important: also double-check to see if the results change how you field out your “zoom out”).)	Names	Date
Feedback from your team:			
Feedback from your Board:			
Feedback from your advisory group:			
Feedback from your			

beneficiaries:			
Feedback from your customers:			
Feedback from any key stakeholders:			
Your thoughts about the feedback you received:			

Reflection & Feedback Post Test

Actual Test Results			
	Points of concern, points of excitement & advice for moving forward	Date	
Feedback from your team:			
Feedback from			

your Board:		
Feedback from your advisory group:		
Feedback from your beneficiaries:		
Feedback from your customers:		
Feedback from any key stakeholders:		
Feedback from Friendly, Wise Skeptic:		
Your thoughts about the test results and the feedback you received:		