A Guide to the Collaboration Canvas

A guide and resources pack to help business, government and social sector organisations develop collaborative projects

Process Canvas as a Mapping tool

By Phil Preston
Based on developmental work with partners,
Jane Cockburn (Kairos Now) and
Allan Ryan (Hargraves Institute)
What is the Collaboration Canvas?

AN EASY-TO-USE ONE-PAGE TOOL
The Collaboration Canvas is a one-page tool that helps with the rapid development of advanced collaborative strategies. It was created in response to problems that companies and practitioners were facing when trying to convert initial ideas into meaningful projects and business innovations.

It is especially suited to projects, workshops and education sessions, allowing individuals, teams and diverse groups to work on operational or strategic initiatives.

The tool ensures that value being targeted through the formation of the collaboration is the focus, and that the conditions are right for a sustained initiative.

The tool was co-created by Jane Cockburn, Phil Preston and Allan Ryan, who are experts in design thinking, shared value and innovation respectively. This same trio has developed the Shared Value Canvas - a specialised version of the Collaboration Canvas.

The Shared Value Canvas is suited to collaborations involving for-profit business where the aim is to address societal issues and improve business competitiveness at the same time.

LICENSING
The canvas is freely available and, as an adaptation of the Business Model Canvas (businessmodelgeneration.com), is licensed under the Creative Commons Attribution–Share Alike 3.0 Un-ported Licence, which permits variations, provided they are attributed to the source.

We encourage use of the canvas and welcome any case studies or examples that make use of it.

This guide provides an overview of the elements of the canvas. If you would like to know more, make an enquiry or provide a link to an instance of its use, please do so via enquiries@philpreston.co
Why use it?

FOR BUSINESS
Because we live in a world of shorter business cycles and highly competitive markets, companies can potentially achieve more using collaborative approaches than they can individually. Collaborations can reduce execution risk and increase commercial value.

Such strategies, if successful, create new value for a particular group of beneficiaries - which could be customers of a business for example - and, if formulated well, may be difficult for competitors to easily replicate.

An example is provided further on in this pack.

There are a range of potential applications, including:
- Creating or reinventing business models
- Differentiating products or brand value
- Developing new products and markets
- Driving productivity and performance improvements
- Boosting people and culture

The Collaboration Canvas helps you map out the features of the strategy and the parties involved.

Completing the canvas marks the end of the initial idea and concept development stage, before you move into the strategy sign off, prototyping and business planning process.

It should be viewed as a part of the overall strategy development process - refer to the Collaboration Development Process chart in this pack to increase your understanding of where it fits in.

FOR SOCIAL SECTOR ORGANISATIONS
The Collaboration Canvas is ideal for mapping out collaboration-based projects or strategies. It ensures that discussions with prospective partners are aligned around a targeted common benefit whilst acknowledging that each member of the collective has its own separate reason to participate.

FOR GOVERNMENT
There is a need to do more with less in government, which means that being part of or facilitating collaborations is very attractive. The Collaboration Canvas is a simple and easy-to-use tool that helps map out the collective and its aims, that government can use to engage other parties in concepts or projects.
When should I use it?

Here are some of the circumstances where organisations find it useful:

**INNOVATION PROCESSES**
A focal point for rapidly developing ideas.

**BRINGING PEOPLE TO THE TABLE**
Use the canvas to illustrate what you are trying to achieve and engage potential collaborators by showing them where they fit in.

**PROJECT ALIGNMENT**
Multi-party collaborations are prone to competing objectives, the Collaboration Canvas aligns members of the collective around a core value proposition, which provides a strong anchor for project development.

**INTERNAL ALIGNMENT**
When proposed strategies impact many areas of an organisation, the tool helps align internal stakeholders with the business goal.

**FACTORING IN PERSPECTIVES**
The canvas challenges you to identify the specific problems being solved for members of the collective and beneficiaries. It will help you motivate and sustain their involvement.

**A STRATEGY DEVELOPMENT TOOL**
It is a useful tool and end point for moving from ideas to concepts to strategic options, before moving to the prototyping stage.

**EDUCATION**
The tool helps to promote a collaborative mindset and build innovation capability amongst your people. For internal and post-graduate education, it provides a window into cutting-edge business techniques.

**WORKSHOP RESOURCE**
Get the most out of workshop and facilitated strategy sessions by working in teams on the canvas.

**REPORTING TO EXECUTIVES OR THE BOARD**
When submissions are required to be presented as strategic options, the canvas helps decision-makers visualise the proposal.

**ILLUSTRATING / STORYTELLING**
The Collaboration Canvas provides a structured way of documenting and telling the story of how a project or initiative unfolded.
Collaboration Development Process

**How to develop a successful collaborative project**

**STEP 1** PREPARE
Bring focus to the project

**STEP 2** INVESTIGATE
Review the current state

**STEP 3** IDEATE
Form an initial idea set

**STEP 4** SYNTHESISE
Produce an option list

**STEP 5** CONCEPTUALISE
Option shortlist

**STEP 6** DEVELOP
From concept to implementation

**SEE**
Collect data via desktop research and/or stakeholder interviews to understand the current state; form an initial view of collaboration components (assets, issues and opportunities), and construct a Business Model Canvas for the business in question. Use the Collaboration Canvas to diagnose and describe existing partnerships.

**DO**
Workshop the option list with the leadership team with the aim of culling those that won’t work and refining those that are attractive. Use the Collaboration Planner tool to check in with the business benefit. Use the Collaboration Canvas to visualise how partners could work together to deliver a collective value proposition.

**THINK**
Synthesise initial idea set by firstly applying practitioner expertise with views of internal and external stakeholders to produce an affinity map (customer needs theming). Use the Collaboration Planner tool to bring structure to the ideas in development. The primary aim is to identify the value proposition that the collective brings over and above business-as-usual; this could be in the form of risk reduction, revenue growth or productivity benefit. Summarise how an opportunity might work.

Gain sign off for the conceptualised strategy and start testing key assumptions before refining the Collaboration Canvas, Collaboration Planner and building credible business models (using the Business Model Canvas) for all parties in the collective. Create the business plan and prototype the chosen strategies.

**INNOVATION TOOLS**
- Collaboration Canvas (a modified form of the business model canvas)
- Collaboration Planner (proprietary tool)
- Business Model Canvas (developed by Strategyzer)
- Design thinking / customer led innovation tools and techniques
- Emergent strategy and brainstorming techniques
- Intangible asset mapping (proprietary tool)

Innovation tools utilised in this process include:

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## Collaboration Canvas

<table>
<thead>
<tr>
<th>Problem being solved</th>
<th>The Collective</th>
<th>Key activities</th>
<th>Collaborative value proposition</th>
<th>Ongoing relationship</th>
<th>User / beneficiary</th>
<th>Problem being solved</th>
</tr>
</thead>
<tbody>
<tr>
<td>For each party to the collective, what problem is it addressing for them?</td>
<td>List the major players that are collectively addressing this proposition</td>
<td>What key activities will be undertaken?</td>
<td>What value is created by the collaboration that can’t be easily achieved individually?</td>
<td>What type of relationship is being established and maintained with the user / beneficiary?</td>
<td>Who will benefit from this initiative?</td>
<td>What problem(s) are we solving for them?</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Key Resources</th>
<th>Channels</th>
</tr>
</thead>
<tbody>
<tr>
<td>What key resources will be utilised?</td>
<td>How are users / beneficiaries engaged or reached?</td>
</tr>
</tbody>
</table>

### Won't work if ...

What might get in the way or pose an unacceptable risk for this initiative?

### Will work if ...

What are the key indicators of success?

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Developed by Jane Cockburn, Phil Preston and Allan Ryan

Shared Value Canvas is adapted from Business Model Canvas (http://www.businessmodelgeneration.com/) and is licensed under the Creative Commons Attribution-Share Alike 3.0 Unported Licence
Guide

To explain each of the components, we first look at the core value proposition before examining the elements on the right hand side of the chart that revolve around the beneficiaries, the members of the collective on the left hand side and, finally, risks and key success factors.

The overall goal is to fill the chart with concise, relevant and meaningful pieces of information. It is not suited to long explanations or insignificant detail.

Collaborative value proposition
The tool helps develop and outline how a collective comes together to deliver value that couldn’t easily be created otherwise, and the problems being addressed for beneficiaries of that process well as members of the collective.

Broad examples of collaborative value propositions:
- Create incentive for supply chain innovation
- Align industry participants to head off onerous regulation
- Increase battery recycling rates

You may also want to include two or three dot points underneath that explain the key components of the strategy. An example is provided later in the pack for illustration purposes.

User / beneficiary
Who is benefiting from this initiative? It is important to be clear on who benefits. If there is more than one beneficiary, you will need to decide whether several appear on the one canvas or whether you need a separate canvas for each group.

It could be broad, such as “beverage consumers”, or a tighter demographic, such as “18-25 year old single mothers with mobile phones”.

Problem being solved (for beneficiaries)
What problem is being solved for the beneficiary? This needs to be completed for each beneficiary listed in the adjacent column. It is best to frame this from the perspective of the beneficiary.

The Collective
List the main members or groups who are collaborating to deliver the value proposition. Where there are several members doing pretty much the same thing, they can often be listed as a group, such as “component manufacturers”, instead of listing them all separately. Keep it focused on significant and material contributors, and consider stakeholders such as government or regulators if they play a meaningful role.

Problem being solved (for the Collective)
Next to each member of the collective, note the problem being solved / opportunity created. If it can't be identified, then there might be a question mark over incentive and project viability or sustainability.
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Channels
Through what channels does the collective reach beneficiaries? This could be, for example, via networks and organisations, or different modes such as in-person or on-line.

Ongoing relationship
What type of relationship is maintained or developed once initial contact takes place? It could be a one-off interaction or ‘transaction’, or an ongoing relationship, such as account manager check-in, regular events or emailed newsletters.

Key activities
List the key activities that members of the collective will be undertaking to achieve the collaborative value proposition. This is pretty wide open and will depend on the nature of the initiative. Marketing, logistics and project management are but a few examples of items that could appear here.

Key resources
What key resources are being utilised in delivering the collaborative value proposition? It could be tangible resources such as funding, provision of facilities or on-line systems, or intangibles, such as key people, functions, networks or specific capabilities.

Won’t work if...
What are the main challenges? What could go wrong or pose an unacceptable risk to the collective? For example, cross-sector collaborations can falter if there are ‘language’ differences; there may be brand risk associated with a member of the collective; or legislative change may be on the cards.

Will work if...
What are the key success factors for this initiative? What qualitative and quantitative indicators should be focused on to gauge success?
Example: MREEEP

MacArthur Real Estate Engagement Project
The Macarthur Real Estate Engagement Project (MREEP) is the name of the collaboration between real estate agents, homelessness service providers and various government agencies, including housing, community services and unemployment support in Western Sydney.

Formation of the project was led by the non-profit entity, Western Sydney Community Forum (WSCF), whose mission is to strengthen the capacity of the social sector. It has a membership of more than 200 social sector organisations and it helped bring the players together with the ultimate aim of reducing homelessness.

The project has staged objectives: firstly, to ensure tenants at risk of eviction are introduced to available support services to reduce new cases of homelessness; and secondly, as trust builds between real estate agents and the social sector, provide people in temporary or refuge housing situations access to rental opportunities.

The Project is now operational and largely independent of funding support. Early on, it was identified that commercial incentive for real estate agents—who manage rental contracts on behalf of owners—would improve the likelihood of success, along with increasing the utilisation of existing social support resources.

Whilst this is a specialised form of collaboration, known as ‘shared value’, it is fundamentally a collaborative project.

In the first two years of operation (2012 – 2014), there were 102 referrals to social support providers from five real estate agents. This has now grown to nine private real estate agents in Macarthur who regularly refer tenants showing signs of rental crisis.

Social outcomes:
• 57 tenancies have been saved
• A high intervention success rate
• About half of the tenants referred through the process had never previously been in contact with the social service system and would potentially have been evicted.
• Real estate agents are beginning to trust community services and contacting them with notifications of vacant properties.

Business outcomes:
For the five original participating real estate agents, there has been:
• An estimated $56,000 in hard costs saved
• Real estate agents have created stronger relationships with property owner clients as a result of better financial outcomes
• A saving of approximately $6,370 in rental income per tenancy at risk for property owners, or $363,090 in total
• Capital / remediation cost savings when evictions are prevented
• The creation of a direct relationship between real estate agents and community service providers to help head off tenancy problems.

Source: Pending case study:
Eva Gerencer and Phil Preston

Collective Wisdom www.hargraves.com.au
# Example: MREEP

<table>
<thead>
<tr>
<th>Problem being solved</th>
<th>The Collective (&quot;MREEP&quot;)</th>
<th>Key activities</th>
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<tbody>
<tr>
<td>Meeting its mission of strengthening social sector capacity</td>
<td>WS Community Forum</td>
<td>Referrals</td>
<td>Reduce homelessness by:</td>
<td>Real estate agents proactively refer to social services providers who ensure tenants have access to support mechanisms.</td>
<td>Tenants at risk of eviction</td>
<td>Preventing eviction due to financial or other issues</td>
</tr>
<tr>
<td>Saving hard costs, operational time and resources and reducing risk of client loss</td>
<td>RE Agency</td>
<td>Data collection</td>
<td>- Supporting tenants at risk of becoming homeless</td>
<td>People in temporary housing who are unable to gain access to rental opportunities due to background or personal attributes</td>
<td>Long term temporary housing / homelessness</td>
<td></td>
</tr>
<tr>
<td>[Reduction in lost rental and remediation costs]</td>
<td>[Property owners]</td>
<td>Feedback system</td>
<td>- Building trust with the real estate sector</td>
<td></td>
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</tr>
<tr>
<td>Meeting homelessness policy objectives</td>
<td>State / Fed Gov’t</td>
<td>Project coordination</td>
<td>- Creating access to opportunities for those in temporary housing / refuges</td>
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<tr>
<td>Client reach / access</td>
<td>State Gov’t: Housing and Community Services</td>
<td>Secretariat</td>
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<tr>
<td>Client identification / mission fulfillment</td>
<td>Homeless service operators</td>
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<td>Client reach / access</td>
<td>Centrelink</td>
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<td>Mission based investment</td>
<td>Bridging financiers</td>
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<tr>
<td>Project development:</td>
<td>Pro-active linking by real estate agents upon indication of hardship</td>
<td>What are the key indicators of success?</td>
</tr>
<tr>
<td>- ST gov’t funding</td>
<td>Online tool streamlines process</td>
<td>- Referrals from RE Agents</td>
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<tr>
<td>- Independent facilitator</td>
<td></td>
<td>- Tenancies saved versus benchmark</td>
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<tr>
<td>Operational</td>
<td></td>
<td>- Number of &quot;Refuge to rental&quot; instances</td>
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<td>- Single contact point</td>
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<td>- Manager</td>
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<td>- RE agent &quot;translator&quot;</td>
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<td>- On line portal</td>
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<td>- Documentation</td>
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<tr>
<td>- Marketing skills</td>
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<td>- Bridge funding pool</td>
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<td>What might get in the way or pose an unacceptable risk for this initiative?</td>
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<tr>
<td>- Cross-sector language differences</td>
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<td>- Poor process / coordination / training</td>
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<td>- Loss of government support / adverse reforms</td>
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<tr>
<td>- High turnover of property managers</td>
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## Collaboration Canvas - Blank Template

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What next?

If you’d like to find out more about how you can use these processes and tools for exploring:

• Industry collaborations
• Alternative business models
• Differentiation from competitors
• New products and markets
• Supply chain and productivity improvements
• Strategic CSR initiatives
• Internal innovation capability building
• People and culture alignment

For more details contact Allan Ryan via

info@hargraves.com.au