



DIGITRANS - Digital Transformation In The Danube Region

Validated Creative Method Tools and Materials

VERSION 1

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1. Introduction

This document summarises all methods accompanying the innovation phase of the DIGITRANS Method Framework to support SMEs in developing new digital business models. It is supposed to give an overview of the steps to be fulfilled when using the methods that are provided in the DIGITRANS method framework. Additionally, templates were developed that can be utilized when conducting the various methods. These templates can be found in the last section of each method descriptions.

Next to the method description, the following set of tools and materials have been developed within the DIGITRANS project:

- a) Strategic Landscape Map Template
- b) Strategy Canvas
- c) Competence Analysis Template
- d) Persona Template
- e) Brainstorming Rules
- f) Brainwriting Template

All developed content will be provided freely to the public over the DIGITRANS online platform and will be licensed under the Creative Commons Licence CC BY-SA 4.0.

Tools and materials that are related to the transformation phase of the DIGITRANS method framework will be developed in connection with the training material development for the e-Learning platform by March 2018.

Generally, the portfolio of tools and materials will further grow depending on the needs resulting from the upcoming business model workshops and face-to-face trainings that will be conducted until April 2019.

In the following, all methods that are part of the DIGITRANS method framework are explained in preparation, execution and purpose. Where adequate, further information and downloads are linked and can be found at the bottom of the method description.

2. Method and tool description

2.1 Analysis Phase

Strategic Landscape Map

Phase	Analysis – Method entry point definition
Purpose / Aim	The development of a strategic landscape map helps you to identify and understand your current strategic landscape in relation to the current technology/legal trends, customer trends, competitor trends and the economic environment trends. The strategic landscape map will be the basis for you to start the analysis phase. Keep it during the whole innovation process and add new findings to it.
Suggested Time	30-45 min
Level of Difficulty	Moderate
Materials Needed	Whiteboard or metaplan wall Coloured sticky notes or moderation cards and magnets
(Number of) Participants	Team (3-7 persons)
Steps	<ol style="list-style-type: none"> 1. Draw the coordinate system on the whiteboard or metaplan wall with four fields (upper left: technology/legal trends, upper right: customer trends, lower left: competitor trends, lower right: ongoing economic environment) 2. Define the four trends in relation to your current business model, write one aspect per sticky note and add it into the coordinate system 3. In parallel, complete the strategy canvas 4. Present your findings
Tools/Templates/Further Readings	<ul style="list-style-type: none"> • Strategic Landscape Map Template • Strategy Canvas (Blue Ocean Strategy)

Strategy canvas

Phase	Analysis – Method entry point definition
Purpose / Aim	In addition to the strategic landscape map (link to it in the online version) it is recommended to complete the strategy canvas to identify the status quo and the future prospects of the company in relation to the market, the customers, competitors and especially noncustomers which you might want to address in the future. It also helps you to reflect again about where you stand in relation to your competitors (where you are better or not so good in comparison to them and where it might be worse to further invest) and the factors you are competing on with your competitors.
Suggested Time	30 – 45 min
Level of Difficulty	Moderate
Materials Needed	Whiteboard or metaplan wall Coloured sticky notes or moderation cards and magnets
(Number of) Participants	Team (3-7 persons)
Steps	<ol style="list-style-type: none"> 1. Draw the coordinate system on the whiteboard or metaplan wall with two axis (y: value scale, x: competing factors) 2. Define relevant competing factors and discuss to what degree the company and its competitors satisfy these factors 3. Collect your findings and attach them to your coordinate system 4. Discuss the value curves of the company and its competitors 5. In parallel, complete the strategic landscape map template 6. Present your findings 7. Remark: in order to select a customer group to work with throughout the workshop, it might be useful to identify relevant stakeholders when going through the process. These stakeholders can be coloured differently (e.g. Customers yellow and partners blue).
Tools/Templates/Further Readings	<ul style="list-style-type: none"> • Strategic Landscape Map template • Strategy Canvas (Blue Ocean Strategy)

Competence Analysis

Phase	Analysis – Method entry point definition
Purpose / Aim	<p>In addition to analysing the market status quo and the general business structure of one company it is recommended to also conduct a competence analysis. Aim of the competence analysis is to get a better understanding which competences in relation to the development of a digital business model and thus resources and skills your company possess and you can further build on to generate sustainable competitive advantages.</p> <p>The competence analysis also helps you to better understand where you have competences which might be relevant for the future, the development of new digital products and where it might be worth to invest more, e.g. additional training, incl. external experts to build up the missing competences.</p>
Suggested Time	30 – 45 min
Level of Difficulty	Moderate
Materials Needed	<p>Whiteboard or metaplan wall</p> <p>Pens, coloured sticky notes</p>
(Number of) Participants	Team (3-7 persons)
Steps	<ol style="list-style-type: none"> 1. Draw the competence analysis table on the board/wall 2. Define the existing competences in relation to the development of a new digital business model within your team. When listing the competences ask yourself the question “Which market am I currently serving, which one do I want to serve and what competences do I need for that?” or “What does my current or potential new customer expects from me and which competences do I have/need to address these needs?” 3. Classify the competences into basic, key or core competence; in case you identify too many basic competences leave them out and concentrate on key and core competences 4. Discuss with your team if the competences are <ol style="list-style-type: none"> a. Valuable (Is it valuable?)

	<p>b. Rarely (Is this a rare competence?)</p> <p>c. Hardly imitable (Is this a unique competence?)</p> <p>d. Transferable (How can the existing core competences be used for new product development/ or within new markets?)</p>
Tools/Templates/Further Readings	<ul style="list-style-type: none"> • Competence Analysis Template

Stakeholder Map

Phase	Analysis – Method entry point definition
Purpose / Aim	A stakeholder map helps to visualise the various groups involved in a particular product or service, such as customers, users, partners, organizations, companies, and other stakeholders and to better understand which stakeholders might be supporters for your new idea and which might be problematic. By linking the interrelations between the different Stakeholders it helps you to analyse how the different parties influences one another.
Suggested Time	30 - 45 min
Level of Difficulty	Moderate
Materials Needed	<p>Whiteboard or metaplan wall</p> <p>Coloured sticky notes or moderation cards and magnets</p> <p>Pens</p>
(Number of) Participants	Team (3-7 persons)
Steps	<ol style="list-style-type: none"> 1. Start collecting the relevant stakeholders in a simple list by writing one stakeholder on one sticky note (use different colours for different kinds of stakeholders, e.g. yellow for customers and blue for partners) 2. Divide them into supportive and problematic stakeholders

	<ol style="list-style-type: none"> 3. Add one sticky note to each stakeholder with a quote expressing their thoughts, opinions, or expectations in relation to your company 4. Save the stakeholder map and refer to it as you move through the process.
Tools/Templates/Further Readings	<ul style="list-style-type: none"> • https://uxdict.io/design-thinking-stakeholder-maps-6a68b0577064 • http://thinking-design.de/stakeholdermap/

Desk research

Phase	Analysis – Method entry point definition
Purpose / Aim	Classic desk research is a fundamental part of an analysis but can also be used in the design phase. Available internal as well as external information sources are analysed with respect to a certain research purpose like a challenge. Internal sources can, for example, be customer data, sales data or reports whereas external sources include third-party reports, product reviews or social media platforms. Obviously, desk research can also be used to gather information about new technologies or law regulations and is mandatory for cost-benefit analysis. One should also keep in mind that doing out-of-the-box research (e.g. trends in different industries) might also lead to interesting findings.
Suggested Time	Ideally, half a day, in a workshop setting 30-60 min.
Level of Difficulty	Easy
Materials Needed	Literature Internet access
(Number of) Participants	Each team member individually
Steps	External sources <ol style="list-style-type: none"> 1. Identify market competitors and check their websites 2. Look for publications regarding the industry / market and existing innovations 3. Do cross checks on similar or related industries

	<p>4. Check the internet for new trends</p> <p>Internal sources</p> <ul style="list-style-type: none"> • Check internal data sources like CRM, ERP etc.
Tools/Templates/Further Readings	

Value Proposition Canvas

Phase	Analysis – Customer and value definition
Purpose / Aim	The value proposition canvas helps you to better understand, identify and describe potential customer groups systematically that are continuously used throughout the DIGITRANS process. By completing the canvas you will understand the jobs, pains and gains of your customer groups. This will help you to later develop a user oriented product, service or solution. The defined jobs, gains and pains will later be mapped against the value proposition in order to check whether your customers' desires are adequately fulfilled.
Suggested Time	60-90 min.
Level of Difficulty	Moderate
Materials Needed	Value Proposition Canvas (ideally printed in DIN A2/A1) Whiteboard or metaplan wall Coloured sticky notes or moderation cards and magnets
(Number of) Participants	Team (3-7 persons)
Steps	<ol style="list-style-type: none"> 1. Identify relevant customer group(s) (see Stakeholder Map) 2. Define and discuss the groups' main daily tasks in their roles (jobs), what obstacles they have to face when pursuing the tasks (pains) and what might be relieving factors they strive for (gains) 3. Prioritize these elements

	<ol style="list-style-type: none"> 4. Collect your findings and attach them to your canvas 5. Present your findings 6. Remark: The process should be regarded highly iterative and therefore loops are necessary and desired. The completion of the value proposition is not supposed to happen in this phase but throughout all phases of the innovation part.
Tools/Templates/Further Readings	<ul style="list-style-type: none"> • Value Proposition Canvas

Interviews

Phase	Analysis – Customer and value definition
Purpose / Aim	Conducting interviews is essential to gather insights and understanding of the needs of your potential customer you want to address that cannot be achieved via desk research. The aim of conducting interviews is to better understand the motivation, behaviour, intention or opinion of your potential customer in relation to your problem, challenge, product. Ideally, interviews should be conducted with representatives of each customer/ relevant stakeholder group and in the place where they are working/living so you get a better understanding of their mindset, behaviour and lifestyle.
Suggested Time	ideally several days, in a workshop at least 60-90 min.
Level of Difficulty	Moderate
Materials Needed	Pen, paper, recording device
(Number of) Participants	3 interviewees at most so that the interviewee is not intimidated by being outnumbered.
Steps	<ol style="list-style-type: none"> 1. Define roles for the interviewees (e.g. interviewer, note-taker, photographer) 2. Prepare the questions and keep in mind to design them as open as possible 3. Start with broad questions (person's life, values and habits) and later on move to more specific one with respect to the challenge

	<ol style="list-style-type: none"> 4. Write down exactly what the person says and not what you think is meant – ideally take notes regarding the mimics and gestures 5. Analyse the interview 6. Present your findings
Tools/Templates/Further Readings	<ul style="list-style-type: none"> • Interview checklist • Interview template

Persona

Phase	Analysis – Customer and value Definition
Purpose / Aim	A persona is an archetype representing your ideal customer. A persona is generally based on user research, e.g. interviews and incorporates the needs, goals, and observed behaviour patterns of your target audience. It creates empathy towards the target groups/customers to be addressed by the digital business model and will influence decisions and activities and will serve you as an inspiration during the ideation phase.
Suggested Time	30 - 45 min.
Level of Difficulty	Easy
Materials Needed	persona template, pens, board, pins/tape, your research findings
(Number of) Participants	Team (3-7 persons)
Steps	<ol style="list-style-type: none"> 1. Print the Persona Template on A3 2. Review your research findings and reflect about your previous experiences with your customer 3. Complete the template within the team by describing ideal-typical criteria and characteristics that all persons of your persona group have in common. 4. Pin the template at the board to be visualised during the whole innovation and transformation phase. The description will be validated through interviews, observation and other research activities and might be changed/adapted throughout the iterative process.

	5. Remark: Develop as many personas as target groups/customer groups exist.
Tools/Templates/Further Readings	<ul style="list-style-type: none"> • Persona Template

Customer Journey

Phase	Analysis – Customer and value Definition
Purpose / Aim	A customer journey helps to better understand the customer on its way to purchase a product, service or just to reflect how a user would behave during a certain situation. Considering different steps and details of that process can illuminate areas for potential insights. Creating a journey map is an excellent way to systematically think about the steps or milestones of a process.
Suggested Time	30 min.
Level of Difficulty	low
Materials Needed	pen, paper
(Number of) Participants	<p>2 team members to conduct the customer journey ideally with potential customers</p> <p>In workshop setting one team member can take the role of a customer the other team member asks questions, observes the “customer’s journey” and documents the findings, lessons learned.</p>
Steps	<ol style="list-style-type: none"> 1. Consider a process or journey that is relevant, or even tangential to, your problem space. 2. Identify potential customers and group in pairs (1 interviewer & 1 customer). 3. Conduct an interview/observation with the potential customer to identify relevant aspects when running through a certain process, e.g. buying something, using a certain tool and note all relevant experiences, user’s needs etc. <p>Remark: A customer journey can be enriched with additional information throughout the whole process. The journey can also be described initially, without a concrete idea of product or service in</p>

	mind. It can then, later in the process, be added and possible benefits examined.
Tools/Templates/Further Readings	

2.2 Design Phase

Brainstorming

Phase	Design – Ideation
Purpose / Aim	Brainstorming is the most known technique to start generating new and unexpected ideas. After having conducted a first in depth analysis about the company’s status quo, its potentials and challenges and after having defined customer’s jobs, pains and gains it is now time to develop concrete digital ideas to address customers jobs, pains and gains respecting also company’s challenges and potentials.
Suggested Time	30 min.
Level of Difficulty	Moderate
Materials Needed	Metaplan wall, whiteboard, sticky notes, pens
(Number of) Participants	Team (3-7 persons) and if possible involve one partner/customer to the session
Steps	<ol style="list-style-type: none"> 1. Hand out pens, sticky notes to every team member 2. Write down the question/the job you want to tackle with the brainstorming session on the metaplan wall 3. Team sets itself a target how many ideas it wants to collect within the next 30 minutes. 4. Agree on the brainstorming rules (see attached tool) 5. Each group member writes/visualises its idea on a sticky note and briefly describes the idea while putting it on the wall. One idea per sticky note.
Tools/Templates/Further Readings	<ul style="list-style-type: none"> • Brainstorming Rules

Brainwriting

Phase	Design – Ideation
Purpose / Aim	Brainwriting is another method of brainstorming to develop new ideas to solve concrete problems/jobs. Within brainwriting the

	hierarchy level within a team is turned off as no direct discussion is taking place and one might be intimidated by a colleague from a higher level.
Suggested Time	3:00 min./round Overall ca. 15 - 20 min.
Level of Difficulty	moderate
Materials Needed	Brainwriting template Pens Timer Metaplan wall
(Number of) Participants	Between the 3-5 participants in one group
Steps	<ol style="list-style-type: none"> 1. The group selects the first relevant jobs (e.g. two) from their customer which needs to be addressed in the brainwriting session to solve the overall challenge. 2. The group members decide who will address which job in the brainwriting session. 3. Each participant writes three ideas related to the selected job on the provided template 4. After 3:00 min. the idea sheet will be circulated to the other participants in a round. Each participant is asked to add additional ideas to or to further elaborate the ideas indicated above. It circulates as often as the last group member has added his/her ideas. 5. Put the brainwriting templates on a metaplan wall and present the ideas to the group <p>Remark: Use a timer for each round. We would propose 3:00 min/round.</p>
Tools/Templates/Further Readings	<ul style="list-style-type: none"> • Brainwriting Template

Idea selection

Phase	Design – Selection of best ideas
Purpose / Aim	After having collected as many ideas it is now time to select the best idea to be further developed into a digital innovative business model addressing the selected customers' profile and company's added value.
Suggested Time	30 min
Level of Difficulty	moderate - hard
Materials Needed	pens, sticker, whiteboard
(Number of) Participants	Team (3-7 persons)
Steps	<ol style="list-style-type: none"> 1. Take the board with all the collected ideas from the brainstorming or brainwriting session 2. Cluster, categories the ideas 3. Talk about the positive, challenging, most inspiring, innovative or most promising (technical point of view, budget and resource wise...) aspects of the categorised ideas. 4. Based on this discussion select/create the idea which seems to you the most promising ones. It can also be a mixture of different ideas. 5. Put those ideas which (currently) doesn't work in another corner of the board as a kind of idea garage 6. In case your team cannot select an idea by discussion, give each team member three points which he/she can distribute on the sticky notes. The idea with the most points is the one the team will further develop. 7. Formulate the idea in a slogan to be prototyped in the next step.
Tools/Templates/Further Readings	

Mock-up

Phase	Design – Prototyping (and testing)
Purpose / Aim	A mock-up is a scaled or full-size model used for discussion, demonstration or evaluation purposes. It differentiates from prototypes by its missing functionalities. A case in which mock-ups are often used, is the demonstration of user interfaces in software products for which special templates but also simple sticky notes can be used without any coding necessary to receive feedback from potential customers.
Suggested Time	45 – 60 min
Level of Difficulty	medium
Materials Needed	Software tool or pen and papers
(Number of) Participants	Team (3-7 persons)
Steps	<ol style="list-style-type: none"> 1. Prepare the canvas for the device you want to create the mock-up for (e.g. smartphone or tablet) using a software tool or paper 2. Draw the relevant elements to visualise your idea 3. If you want to visualise customer interactions like menu flows, copy and paste (or redraw) your canvas and present the changes 4. Remark: When developing a mock-up concentrate on designing the interface and do not concentrate on the functionalities behind.
Tools/Templates/Further Readings	<ul style="list-style-type: none"> • SAP Scenes (provide wireframes for mock-ups)

Storytelling (SAP Scenes)

Phase	Design – Prototyping (and testing)
Purpose / Aim	Storytelling can be regarded as a kind of prototyping in which an idea is presented in a narrative way by visualizing the information. By using materials like cardboard figures or comics, scenes can be created and a story can be told in a playful and lively manner. This method forms an ideal basis for discussion and interpretation and aims at the creation of a common understanding. SAP presents an excellent tool with its SAP Scenes that consists of figures that can be printed on cardboard and used for storytelling. SAP Scenes are freely available, licensed under an open Creative Commons licence.
Suggested Time	45 – 60 min
Level of Difficulty	Easy
Materials Needed	Pen and paper, space for presentation, glue sticks and gift ribbon (to visualize connections)
(Number of) Participants	Team (3-7 persons)
Steps	<ol style="list-style-type: none"> 1. Put the slogan you have created after the idea selection visibly next to you. 2. Print and cut out the SAP Scenes elements 3. Pick the figures and elements that fit to your story and put them on the table (glue them if required) 4. Make sure that the order of your narration is understandable and use gift ribbon to highlight connections between the elements 5. Ideally, create a slogan that speaks for your story and describes your prototype 6. Put your prototype on a separate board so that you can easily move it around for presentation.
Tools/Templates/Further Readings	<ul style="list-style-type: none"> • SAP Scenes

Handcrafted prototypes

Phase	Design – Prototyping (and testing)
Purpose / Aim	The purpose of handcrafted prototypes, as with every kind of prototype, is to visualize an idea developed based on user research and stakeholder input to create a common basis of understanding and discussion. It helps to make ideas tangible, to better understand the processes and interactions that are behind this idea to learn through making and to receive quick feedback by presenting the idea to people you are designing for.
Suggested Time	30-60 min
Level of Difficulty	Moderate
Materials Needed	All kinds of handcraft materials, supplies, modelling clay, cardboards or LEGO blocks
(Number of) Participants	Team (3-7 persons)
Steps	<ol style="list-style-type: none"> 1. Put the slogan you have created after the idea selection visibly next to you. 2. Prepare the materials that you wish to use 3. Develop your prototype remembering the needs of your customer you have identified in the analysis phase and you now want to solve with your prototype 4. Keep in mind it is a prototype. No need to develop something perfect but something tangible that reflects your idea. Prototypes are meant to be tested, evaluated and replaced by something better. 5. Ideally, create a slogan that speaks for your story and describes your prototype 6. Take your prototype out and let it test from people, your potential customers you are designing for.
Tools/Templates/Further Readings	-

Business Model Canvas

Phase	Design – Business Model Canvas
Purpose / Aim	The Business Model Canvas is a method to develop, visualize and test new business model ideas. The Business Model Canvas integrates the 9 most important building blocks of a successful business model in a clear way: 1. Customer segments, 2. Value Proposition, 3. Channels, 4. Customer Relationships, 5. Revenue Streams, 6. Key Resources, 7. Key Activities, 8. Key Partnerships, 9. Cost Structure.
Suggested Time	1 hour
Level of Difficulty	Medium
Materials Needed	Printed copy of the Business Model Canvas (A0), sticky notes, pens
(Number of) Participants	Team (3-7 persons)
Steps	<ol style="list-style-type: none"> 1. Put the printed copy of the Business Model Canvas on a wall or whiteboard. 2. Write your ideas on sticky notes and put them in the building blocks. 3. Start with the building blocks “Value Proposition” and “Customer Groups”. Use the ideas you have already generated before in the Value Proposition Canvas. 4. Discuss within the group the next steps to fill out the building blocks. 5. Put sticky notes in all building blocks. Pay attention to the interrelations between the building blocks. 6. When every building block is filled out with sticky notes discuss within the group if your Business Model Canvas makes sense. 7. Keep the Business Model Canvas visible throughout the whole iterative process and revise it consequently to your lessons learned and further product development
Tools/Templates/Further Readings	<ul style="list-style-type: none"> • Business Model Canvas • Value Proposition Canvas

Testing

Phase	Design – Testing
Purpose / Aim	Testing is an important step you to get direct feedback from your customers on your initial digital business model idea and to better understand them. It also supports you in developing something that is of added value for them which they want to use later on. Testing is always the basis to further improve your product/services and also to rethink your general idea.
Suggested Time	60 min.
Level of Difficulty	Moderate
Materials Needed	Pens, paper, your prototype, your business model canvas
(Number of) Participants	Team and ideally people you are designing for. If that’s not possible then some people who were not involved in the development so far and will take the role of your potential customer.
Steps	<ol style="list-style-type: none"> 1. Plan your testing by e.g. giving each team member a concrete role; defining what you want to tell the users etc. 2. Display your prototype and your business model canvas to the testing team. Highlight that you are looking for constructive positive and negative feedback. 3. Introduce your prototype and your BMC by not telling too many details. Do not tell how it works, how the customer will benefit etc. Let the users experience it. 4. Observe the users how they are using the prototype, ask them to tell you what they are thinking, how/what they feel when using/looking at the prototype. 5. Ask follow-up questions, e.g. “what do you mean with...”, “why are you using it in this way...?”, “would they be willing to pay for it?” etc. 6. Collect, write down the feedback. It will help you to develop and improve your ideas further. 7. Keep getting feedback during the whole iterative development process.
Tools/Templates/Further Readings	

Minimum Viable Product

Phase	Design – Testing
Purpose / Aim	A Minimum Viable Product (MVP) is another kind of functional prototype. It describes a development stage of a product offering just enough features to satisfy early customers and get their feedback on the product or service. Its main purpose is to conduct first acceptance tests before further developing to thus avoid spending too much time and money in the development of a product which your potential customer might not need in the end.
Suggested Time	60 min.
Level of Difficulty	Moderate
Materials Needed	Pens, paper, your business model canvas, appropriate software in case you
(Number of) Participants	Team (3-7 persons) and ideally people you are designing for. If that's not possible then some people who were not involved in the development so far.
Steps	<ol style="list-style-type: none"> 1. Identify core features that are mandatory to the customer 2. Select customer group (specific customers) for acceptance tests 3. Produce the MVP 4. Provide the MVP (with instructions) and some kind of feedback system 5. Collect and evaluate the feedback for further decisions on development
Tools/Templates/Further Readings	