

Sustainable Business Model Design Workshop I: Outline & Facilitation Guide

Beta version, September 2023

This facilitation guide helps you prepare and run workshops based on the concepts and principles from the book “Sustainable Business Model Design – 45 Patterns” and its complimentary card box “Sustainable Business Model Design – 45 Cards”.

The guide follows a concise step-by-step facilitation approach and draws on the insights contained in “Sustainable Business Model Design – 45 Patterns”. It provides a structured and thought-provoking approach to running workshops with students on all levels, start-up and corporate innovation teams, CSR and ESG experts, product and business developers, and various other stakeholders. Literally everybody can learn how to design better business models!

Help your students, colleagues, and clients learn how to use business model patterns. Let them unlock their creativity for more sustainable business practices. Empower them to develop the skills and ideas needed to become key advocates for sustainability transformations in both business and society.

The authors of this guide have successfully facilitated SBMD workshops at various international business schools and universities, with start-ups and established companies, as well as governmental and non-governmental organisations. Hundreds of students and business experts have already benefited from learning the fundamental concepts and skills of sustainable business model design.

If you have questions or want to share feedback, which would be much appreciated, send a message via <https://www.sustainablebusiness.design/#contact>.



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Introduction

Some general tips

It's teamwork! The workshop format outlined below is made for teams. At least 3 people should be in one team. We have done it with 8 persons per team as well. A good number, as a rule of thumb, is 5. That is, when you have teams of 10, 15, 20 etc. people, split them up into 2, 3, 4 etc. teams. There are many ways of setting up teams; below we propose an affinity-based approach.

Diversity is key! The teams should be mixed and various (e.g., in terms of background, level of expertise, gender, age, preferences etc.). The more diverse, the better. SBMD workshops work best if participants have diverse interests and skills that they can combine.

Your expertise! If you are facilitator, you must take over multiple roles, which should not be underestimated:

- SBMD topic expert (read the SBMD book, [free book preview](#), [free cards preview](#))
- Lecturer (use our [free slide decks](#))
- Case study expert (use your favourite case, and/or invite a guest speaker, and/or use your client's case)
- Facilitator (have full control of every step)

As experienced teacher, facilitator, or consultant, this will be relatively easy for you. However, facilitating several teams in parallel can be exhausting. We recommend facilitating no more than 3 teams simultaneously. If you have larger teams, make sure co-facilitators will help you (one per 3 teams). Co-facilitators don't have to be SBMD or workshop experts (you can hire students, for example). Their main task is to have an overview of the main process steps and be available for their teams in case they have questions or get stuck.

You need time, space, and coffee! The basic workshop, including initial lecture and case introduction, lasts 6-8 hours. Make sure you have sufficient space, light, tables (at least one per team), facilitation material, and coffee, sweets, or whatever helps you and the participants to refresh. Also consider having a proper lunch break.

Preparation needs time – do a test run! If you do this workshop for the first time, it is important to start planning and preparing a few weeks before the workshop. You should do a test run, maybe with colleagues, friends, and family. Acquiring all materials takes some time, as does working through all facilitation steps for the first time. Our experience: Even as trained facilitators it takes a few days to make proper preparations (looking up new case material, adapting facilitation strategy and pattern selection to the case, understanding the expectations of participants etc.).

Materials needed

- **SBMD book, as print or e-book version:**
 - The facilitator should know the book very well.
 - Participants should have access to the book. At least, they should read pp. 26-51 before the workshop, and they should also have some time to skim through the 45 patterns in chapter 4.
 - Find a book preview here. Find suppliers of the book [here](#).
- **SBMD cards, in printed form:**
 - A full card set box is available.
 - You need one box per team.
 - Find a preview of the cards here. Find suppliers of the cards [here](#).
- **SBMD slide deck:**
 - We prepared a slide deck for an introductory lecture on SBMD.
 - It is available for free from our website. Feel free to use and modify it!
 - Find the slide deck download [here](#).
- **Workshop slide deck:**
 - An exemplary slide deck to introduce the workshop format and a case is available.
 - It is available for free from our website. Feel free to use and modify it!
 - Find the slide deck download [here](#).
- **Business modelling tool:**
 - We recommend using UX Berlin's BIK – Business Modelling Kit – which builds on and extends the classic business model canvas by Osterwalder and Pigneur.
 - You can download the BIK's business modelling worksheet and instruction cards for free from <https://www.uxberlin.com/business-modelling-kit/>.
 - Printed box sets and cards are available from UX Berlin as well.
 - You can also use special canvases such as the [Flourishing Business Canvas](#) or the [Triple-Layered Business Canvas](#).
- **And, of course, facilitation equipment:**
 - Such as a whiteboard and pens.
 - Business modelling worksheets.
 - And lots of sticky notes (150-200 per team).

Ready!? Go!!

SBMD Workshop Outline & Facilitation Guide

*To get started, you can use this document just as it is.
But of course, you can also adapt it to your specific context and needs.*

Event

Event name: _____

Date: _____

Location: _____

Speaker(s): _____

Facilitator(s): _____

Support: _____

Outline of the workshop day (reserve a full day, at least 6 hours)

- Step 1: Presentation: Sustainable business model design basics, [slides](#) [60-90 mins]
- Step 2: Introduction to workshop and case [30-90 mins]
 - Workshop overview, [exemplary slides](#)
 - Case presentation, guest talk etc., incl. specification of the case challenges the teams have to work on [exemplary slides](#)
- Step 3: Workshop – working in teams [180 mins]

While steps 1 and 2 should be self-explaining and are supported by ready-to-use slide decks, the following sections focus on the details of step 3, which is running the actual workshop.

Note: The following workshop format builds on the ‘problem-solving approach’ described in “Sustainable Business Model Design – 45 Patterns” (pp. 255-259). This approach is used when one or more specific challenges are given. Another, more open approach is the ‘generative approach’, which is about developing new business ideas from scratch (cf. pp. 260-266). You can use the following outline and adapt it to your needs, in case your setting is less problem-centred, but more about open idea generation.

Workshop – Overview [180 minutes]

Part A – Agree on the challenge and select patterns [60 mins]

- I. Understand – Problem and challenge [20 mins]
 - Affinity-based team formation [all, 4 mins]
 - Review and agree on the underlying problem [team, 6 mins]
 - Review and agree on the specific challenge resulting from the problem [team, 10 mins]
- II. Set the Course – Identify pattern candidates [10 mins]
 - Screen and find pattern candidates [individual, 10 mins]
- III. Review and Select – Select pattern(s) to work with [20 mins]
 - Review and select pattern candidates [pairs, 10 mins]
 - Review and select one pattern [team, 10 mins]
- IV. Adapt and Combine – Select supporting pattern(s) to work with [10 mins]
 - Review and select supporting pattern(s) [team, 10 mins] (optional)

Part B – Model and pitch [120 mins]

- V. Model – Ideation and refinement [100 mins]
 - Fill ideation pool [team, 64 mins – 8 minutes per BM element]
 - Vote for most promising ideas [team, 6 mins]
 - Refinement and pitch prep [team, 30 mins]
- VI. Pitch! [20 mins]
 - Present BM ideas in front of the whole group [all]

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Notes:

- It is important to present specific challenges during the workshop introduction and case presentation. In affinity-based team formation the participants decide for one of the challenges. Based on their interest in certain challenges, teams will emerge.
- “All” = activity on whole group level; “team” = activity on team level, “individual” = activity performed by individual team members.
- One person per team should volunteer as team-lead. If the conversation does not get started, gets stuck, or drifts away, the team-lead should try to keep things in a good flow.
- Also consider that the workshop main facilitator, most likely you, may need help from co-facilitators if there are more than 3 teams.

Workshop – Detailed description of all activities [180 minutes]

PART A – AGREE ON THE CHALLENGE AND SELECT PATTERNS [60 MINS]

PHASE I: UNDERSTAND – PROBLEM AND CHALLENGE

Total time: 20 minutes

Result: Problem and challenge formulation and shared understanding on team level.

Important: Focus on the problem, its root cause, and the challenge, not solutions (these come later)!

1. **Team formation [all, 4 mins]**
 - a. *Goal (why):* Set up teams based on participants' interest/affinity for a specific challenge.
 - b. *Format (how):* Challenges written on cards laid out on tables (T). For example: T1: "End of life", T2: "International expansion", and T3: "Farmer inclusion".
 - c. *Instructions (what):* "Choose one table based on your topical interest."
 - d. *Result:* Teams with challenges.

2. **Review and agree on the problem [team, 6 mins]**
 - a. *Goal:* Review, refine, and agree on the problem faced by the company, and its assumed root cause.
 - b. *Format:* Open conversation; team level.
 - c. *Instruction:* "Select one of the problem areas outlined before. Do a brief recap of the selected problem area and, if necessary, reformulate it in your own words. Write it down on a sticky note. Start by asking each other: What is your specific understanding of the problem? And what is its assumed root cause?"
 - d. *Result:* Formulation of problem incl. root cause on a sticky note. Positioned close to the business modelling worksheet.
 - e. *For example:* "We offer health care services, but still many people don't have access to them [problem], because distribution is lacking and is too costly [root cause]." Or: "We are using waste as production input, but we are not fully closing the loop as we lack control about the end of life of our products [problem], because of the complexity of the reverse supply chain [root cause]."

3. **Review and agree on the specific challenge resulting from the problem [team, 10 mins]**

- a. *Goal:* Review, refine and agree on the challenge and the “How Might We?” question that results from the problem and root cause, in a way that makes it meaningful for you.
- b. *Format:* Open conversation; team level.
- c. *Instruction:* “Do a brief recap of the challenge resulting from the problem identified before and (re-)formulate the challenge in your own words. Start by asking each other: What is your specific understanding of the challenge resulting from the underlying problem and its root cause?”
- d. *Result:* Challenge formulated on a sticky note and positioned close to the business modelling worksheet.
- e. *For example:* “How might we ramp up distribution in rural areas and bring health care services to poor people?” Or: “How might we reduce the complexity of reverse supply and increase the rate of recycling of our bestselling product?”

Note: Consider that each word can have an influence on the specific focus. For example, ‘rate of recycling’ (refers to product volume) vs. ‘recyclability’ (refers to product characteristics), or ‘bestselling product’ (a specific product) vs. ‘products’ (any or all products).

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PHASE II: SET THE COURSE – IDENTIFY PATTERN CANDIDATES

Total time: 10 minutes

Result: Identification of individually preferred pattern candidates.

Important: Make the participants work with the pattern cards. You can preselect the most suitable patterns. However, in this step, a good number of patterns should be handed out to them – variety leads to creativity! Make them work with the patterns overview, Pattern Triangle, Pattern-at-a-Glance, and callouts in the SBMD book. When reading the pattern cards and descriptions in the book, participants must focus on the pattern challenges, not solutions!

4. **Screen and find pattern candidates [individual, 10 mins]**

- a. *Goal:* Individual team members identify up to three pattern candidates.
- b. *Format:* Brainwriting; individually, silently.
- c. *Instruction:* “Look at the patterns. Ask yourself: Which patterns resemble the company’s situation and challenge, or aspects of it? Select a maximum of three

patterns and make a ranking in terms of your individual preference. Take notes.”

Note: Additional instruction, if necessary: “While screening the patterns, make use of the patterns overview and Pattern Triangle. Focus on their Pattern-at-a-Glance pages, challenge descriptions, and callouts and compare these to your challenge formulation – are there similarities in the challenges or their sub-aspects that point to a potential fit? No need for perfect fit!”

- d. *Result:* Identification of up to three individually preferred pattern candidates.
- e. *For example:* A participant thinks that the “By-Product Synergy” (12) pattern and maybe the “Sustainable Product Design” (10) patterns could relate to the company’s challenge. Because their challenges are about “how to design for circularity” (10) and “how to turn waste into valuable by-products” (12).

PHASE III: REVIEW AND SELECT – SELECT PATTERN(S) TO WORK WITH

Total time: 20 minutes

Result: Selection of one pattern on team level.

Important: When reading the pattern cards and descriptions in the book, participants must focus on the pattern challenges, not solutions!

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5. Review and select pattern candidates [pairs, 10 mins]

- a. *Goal:* Pairs agree on one pattern candidate.
- b. *Format:* Speedstorming; discussing in pairs.
- c. *Instruction:* “Present your individually identified and ranked patterns to the person sitting opposite to you. Together review your first-preference patterns in detail. Agree on one preferred pattern of which challenge best resembles the features of the company’s challenge.”

Note: Additional instruction, if necessary: “If no result can be achieved with your first-preference patterns, turn to your second and third-preference patterns, until agreement on a joint candidate is achieved.”

- d. *Result:* One preferred pattern per pair.
- e. *For example:* Participants discuss the “By-Product Synergy” (12), “Sustainable Product Design” (10), and “Green Razor and Blade” (8) patterns. They agree that “Sustainable Product Design” (10) is the most preferred. Because its challenge is about “how to design for circularity”.

6. **Review and select one pattern [team, 10 mins]**

- a. *Goal:* Team agrees on one pattern.
- b. *Format:* Open conversation; team level.
- c. *Instruction:* “Present your pairwise identified patterns to the team. Review these patterns together and agree on one pattern of which challenge best resembles features of the company’s challenge.”

Note: If there are good reasons for working with a second pattern, take corresponding notes for the next step. and work on agree on a secondary, supporting or back-up pattern. For example, because “Remanufacturing” doesn’t work without “Sustainable Product Design”.

- d. *Result:* Selection of one pattern on team level.
- e. *For example:* You discuss the “By-Product Synergy” (12), “Sustainable Product Design” (10), and “Green Razor and Blade” (8) patterns. You agree on working with the “Green Razor and Blade” (8) pattern.

PHASE IV: ADAPT AND COMBINE – SELECT SUPPORTING PATTERN(S) TO WORK WITH

Total time: 10 minutes (optional)

Result: Selection of one or two supporting patterns on team level.

Important: When reading the pattern cards and descriptions in the book, participants must focus on the pattern challenges, not solutions!

7. **Review and select supporting pattern(s) [team, 10 mins] (optional)**

- a. *Goal:* Team agrees on one or two supporting patterns.
- b. *Format:* Open conversation; team level.
- c. *Instruction:* “Continue with the team-level review and selection of patterns. If there are good reasons for working with a second or third pattern, i.e. pattern combinations, agree on one or two supporting patterns.”
- d. *Result:* Selection of one or two supporting patterns on team level.
- e. *For example:* The “Green Razor and Blade” (8) challenge (“how to sell long-lasting products”) includes aspects addressed by “Upgrading” (20) (“how to make products function as long as possible”).

PART B – MODEL AND PITCH [120 MINS]¹

PHASE V: MODEL – IDEATION AND REFINEMENT

Total time: **100 minutes**

Result: Drafts and pitches of new, pattern-based business model designs.

Important: Make sure that participants always consider the selected pattern(s) in their ideation. Each BM component requires a pattern-specific perspective: How does the pattern influence the value proposition ...? Which additional stakeholders should be considered by applying the pattern ...? What kind of revenue sources and models are motivated by the pattern ...?

8. Fill ideation pool [team, 64 mins – 8 minutes per business model element]

- a. *Goal:* Teams come up with many ideas per BM element. The business modelling worksheet turns into a rich pool of new BM ideas.
- b. *Format:* Brainwriting and brainstorming; individual and team level.
- c. *Instructions:*

“(1) Each team-lead reads out the BM element card (3 minutes). Here, links to the selected pattern(s) should be made by asking pattern-specific questions.” (For example: “What kinds of new value proposition does the ‘Upgrading’ (20) pattern motivate?”)

“(2) Do 2 minutes of brainwriting, individually. Ask yourself, for example: “How does ‘Upgrading’ (20) change the company’s current value proposition? Which additional stakeholders do (not yet) benefit from ‘Upgrading’ (20)? Use sticky notes, quantity above quality! Aim for 10 ideas per BM component.

“(3) Take 3 minutes to briefly speak out your ideas (no lengthy explanations!). Consider the brainstorming rules (listen, no critique or discussion, build on each other’s ideas, no selection!).”
- d. *Result:* Filled-in business modelling worksheet.
- e. *For example:* The “Green Razor and Blade” (8) and “Upgrading” (20) patterns lead to new ideas for modular products and additional services in support of these products.

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¹ Part B builds on the BIK process defined in the handbook “How to Model New Business: Business Innovation Kit” by Henning Breuer (2014), <https://amzn.eu/d/bwzsg96>.

In addition, you see additional value in terms of positive ecological effects that can be beneficial for various new stakeholder groups.

9. **Vote for most promising ideas [individual and team, 6 mins]**

- a. *Goal:* Identify ideas that seem to be promising for a new BM designs that follow the principles of sustainable business model design.
- b. *Format:* Open round; individual activity.
- c. *Instructions:*

“(1) Look at the ideation pool. Ask yourself: Which ideas look most promising in light of the company’s problem and challenge? Assign votes by marking the respective sticky notes. You have five votes. These can be spread across different ideas, or several/all votes can be given to a single idea.”

“(2) Those stickies with the most votes will serve as anchor points for designing your new sustainable business model. Focus on 3 or 4 stickies that could work well together. Sometimes, one sticky only works as well.”
- d. *Result:* Anchor point(s) for the refinement of the business model design are identified.
- e. *For example:* A team member assigns 3 votes to a preferred value proposition and 2 to a preferred idea for revenue generation. Both receive the most votes overall and become the potential anchor points for the next business modelling step.

10. **Refinement and pitch prep [team, 30 mins]**

- a. *Goal:* Design and refine a new BM based on the anchor points and further ideas from the ideation pool. Prepare a 2-minute pitch to present the new BM design.
- b. *Format:* Open discussion; teamwork.
- c. *Instruction:*

“(1) Take a look at all marked ideas. Discuss which of the anchor points can serve as a good starting point for a new BM design. CONSIDER THE PATTERN and its main mechanism. It should be supported by the new design (for example, increasing product longevity in the case of ‘Upgrading’ (20)).”

“(2) Decide for one anchor point and one corresponding BM element to start with. Copy the idea to a refinement sheet (for example, a new upgrading service offering, positioned on the value proposition element). CONSIDER THE PATTERN!”

“(3) Continue discussing and copying further ideas that are consistent with those already on the refinement sheet. Copy them from the original worksheet to the refinement sheet. CONSIDER THE PATTERN!”

“(4) Design a new BM step-by step by adding further ideas to the refinement sheet until a consistent design emerges. CONSIDER THE PATTERN!”

“(5) If necessary, add BM aspects that might be missing or modify existing ideas (for example, your worksheet does not offer a suitable idea for pricing the upgrading offering; develop it now. Improvisation is fine. CONSIDER THE PATTERN!”

“(6) Finally, prepare a 2-minutes pitch to present your BM design. Identify a speaker for the pitch. Give your design a catchy name! (For example, ‘Upgrade my Upgrading Business Model’ 😊)”

- d. *Result:* Filled-in refinement sheet representing a new BM design and a 2-minutes presentation of it.

Note: In this step you must provide additional business modelling worksheets as refinement sheets on which the new SBM design(s) can be noted down and developed further.

PHASE VI: PITCH!

Total time: 20 minutes

Result: New SBM designs are presented and discussed with the whole group; the role and relevance of the patterns are discussed.

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Important: 2 minutes presentation, 3 minutes Q&A per team to keep it catchy – maybe make use of the BIK’s challenge cards, if time allows and/or if discussion needs some motivation.

11. **Present BM ideas in front of the whole team [all, 20 mins]**

- a. *Goal:* Share and discuss new BM designs to see whether and how the patterns helped in their development.
- b. *Format:* Pitching in front of the whole group.
- c. *Instruction:* “Present your business model design. No more than 2 minutes! Up to 3 minutes of Q&A. Go!”
- d. *Result:* New SBM designs are presented and discussed with the whole group; the role and relevance of the patterns are discussed.

Note: At this stage, after a full day, most people are exhausted but happy because of their team achievement. Boost their energy by issuing an award. Let the audience vote (e.g., by making noise) for the best pitch. Give a prize to the winners!