



Built for Impact:

The Ultimate Toolbox **for Social Innovators**

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TABLE OF CONTENTS

This toolbox is aimed at social innovators and social innovation multipliers across ecosystems.

We believe that tools carry culture and values, and have adapted and enhanced some of the most treasured tools to better fit the needs and narratives of impact-driven entrepreneurs.

0.0 CRAFT Community	3
0.1 Navigating the toolbox	4
0.2 Getting Started Maps	6
0.3 TOOLS:	
1. Business development	
1. Business Value Model Canvas	8
2. Impact Business Plan Checklist	14
3. Inclusive Personas Canvas	28
2. Team development	
1. Team Member 'User Manual' Canvas	34
2. Work Environment Assessment	41
3. Miro for Teamwork Guide Board	47
3. Impact development	
1. System Problem Tree Canvas	52
2. Ecosystem Theory of Change Canvas	58
3. Impact Scan: A Starter Map for SROI	63
4. Finance development	
1. Purpose Cost Breakdown Model Canvas	68
2. Purpose Revenue Model Canvas	73
3. Impact Investment Readiness Self-Assessment	78
0.4 Closing remarks: maturity of tools & acknowledgments	83

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CRAFT Project Leader: Lucia Radu

Toolbox Lead & Co-creation Methodology Designer:

Milena Ninova

Tools Co-Designers: Diana Pati, Suzanne Jenkins, Ruxandra Creosteanu

Toolkit experts: Lucia Radu, Suzanne Jenkins,, Milena Ninova

Graphic design: Thea Arends

Research Lead: Mathilde Pellizzari

Communication Manager: Al Siew

Community APPA platform Manager: Emanuele Musa

We USE tools, We LOVE tools, We MAKE & IMPROVE tools!

The community's ambition is to create a toolbox
for and by 'Tools Lovers'
who engage in or enable social impact entrepreneurship
but are mindful of underlying factors and drivers for
positive change across entire ecosystems.

CRAFT Online Community

To further benefit from additional resources and tool files, create a free account at the **CRAFT online Active-Peer-to-Peer-Academy (APPA)**, linked below.

You can **connect with fellow CRAFT community members across Europe** and exchange best practices.

You can **suggest new tools and materials** for improvement, **ask questions and share your work and positive impact**.



*"Thank you for all your efforts in improving these tools and making them available to everyone. We need to develop the habit of critically asking questions about the tools we use, (...) and how we can upgrade them."**

*All quotes evaluating tools from the toolbox have been collected during the second registration research of the CRAFT project with target ecosystems in Romania, Latvia and Croatia 2025.

ACCESS LINKS

- Join our community - **Active-Peer-to-Peer-Academy** - <https://app.craftaction.eu>
- Find all tools in the **CRAFT Toolbox Public Folder**
- Stay informed & Sign up to events via our **website** <https://craftaction.eu/>
- Connect with us via LinkedIn - **CRAFT Project**

NAVIGATING THE TOOLBOX

Structure

The toolbox currently contains **12 tools split into 4 categories**:



Co-Creation Improvement Criteria

The development of the CRAFT toolbox and respectively all tools within it follow **key values of social innovation**. During an interactive **co-creation effort tools were selected and enhanced** to better address the needs of impact-driven and social entrepreneurs.

By the **indicated criteria icons**, you can see what **directions for improvement** have been used when developing the CRAFT version of each featured tool.

(Read here more about the process, the selection and the co-creation approach, in [Deliverable 3.1](#))



Purpose



Sustainability



Collaboration



Wellbeing



Diversity, Equity & Inclusion



Critical Evaluation & Pivoting



Risk Assessment



Systems Thinking



Ethics & Transparency

Getting Started Recommendation

All tools can be used by social innovation actors and multipliers at their preferred time and format. However we offer a recommended stage and situations for **'when to apply a tool'**.

You can refer to the **'Navigation Map'** (page 6) and the **'Tool Diagnostic Map'** (page 7) to select which tool to use, based on your need.

Each tool comes with instructions and suggested interpretations, variations and tips. Keep in mind that **tools are best used and revisited in an iterative manner to build up and adjust over time**.

Whether you are an initiative, startup, enterprise, corporation, non-governmental or governmental organization, or any other type of entity or project, you can **adapt and make use of the value-provoking and system-thinking prompts within the tools**.

NAVIGATING THE TOOLBOX

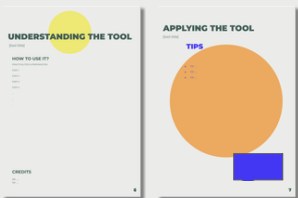
Per tool you get a:

- **Title page** with the key CRAFT values criteria weaved into this social innovation-focused version of the tool.
- **Introduction page** with details about the improved version, recommendations on 'for whom' and 'when to apply the tool', as well as indication of the available format options and access links.

At the bottom there is an indication of the **time required** to get familiar with the tool materials. However the duration of actually putting the tool into practice can vary greatly. The CRAFT tools aim to provide a very comprehensive and overarching picture at the beginning of approaching a task or a challenge.

Hence, they can be more time-consuming at first but later save you time and mitigate risks in the future.

- One or more **visual pages** that showcase a preview of the tool. At the bottom of these pages you can see the original tools used.
- **Instructions page** with preparation suggestions, step-by-step guidance, credits to the original tools and additional resources (available on the online community called Active-Peer-to-Peer-Academy)
- **Application page** with recommendations, tips from best practices and **testimonials** from CRAFT community members.

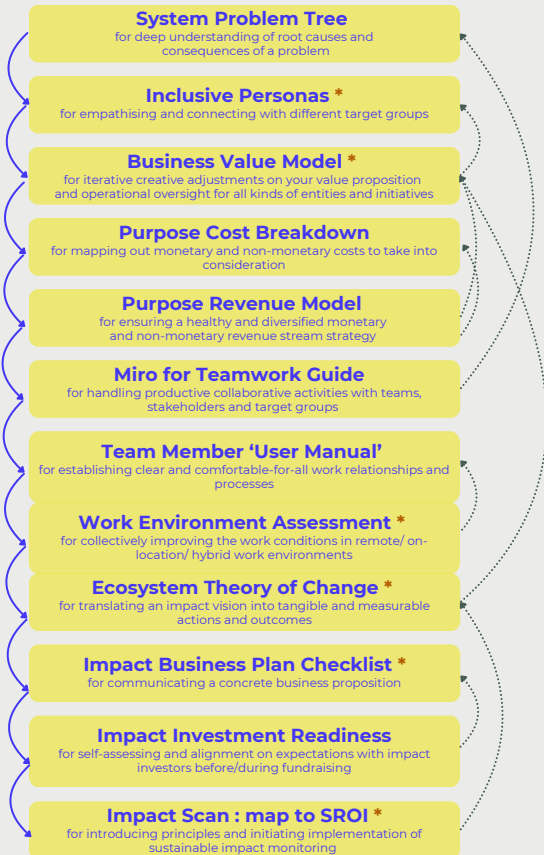


MAP



Suggested order of tools' implementation:

Alternative flows:



Consider regularly iterating on key tools marked with *

TOOL DIAGNOSTIC MAP: matching challenges to tools

How to Use This Map:

- **Start with your current challenge** (e.g., "We're struggling to clarify our social value.")
- **Find the corresponding row** in the table.
- Use the **recommended tool(s)** as your next step.

Challenge / Problem Area	Recommended Tool(s)	Tool Category
1. Defining your value or purpose as an entity	- Business Value Model - Inclusive Personas	Business
2. Building a business plan with social impact	- Impact Business Plan - Impact Investment Readiness	Business / Finance
3. Understanding your customer or beneficiary	- Inclusive Personas - Miro for Teamwork Guide	Business / Team
4. Clarifying your team's roles and dynamics	- Team member 'User manual' - Work Environment Assessment	Team
5. Improving collaboration and team culture	- Miro for Teamwork Guide board - Work Environment Assessment	Team
6. Mapping the root causes and consequences of a social issue or system challenge	- System Problem Tree	Impact
7. Designing a strategic intervention model	- Ecosystem Theory of Change - Impact Scan (SROI Map)	Impact
8. Understanding your potential for social return	- Impact Scan - Map for SROI	Impact
9. Estimating your monetary and non-monetary costs	- Purpose Cost Breakdown Model	Finance
10. Planning your revenue streams aligned with your purpose	- Purpose Revenue Model	Finance
11. Assessing your readiness for investment	- Impact Investment Readiness	Finance



BUSINESS* VALUE MODEL CANVAS

*suitable for B2B, B2C, NGO, GO, Projects, Initiatives and more.



Purpose



Sustainability



Collaboration



Wellbeing



Diversity, Equity
& Inclusion



Critical Evaluation
& Pivoting



Risk Assessment



Systems
Thinking



Ethics &
Transparency

NAVIGATING THE TOOL

BUSINESS VALUE MODEL CANVAS

This adaptation of the Business Model Canvas is specifically **co-created with and aimed at social innovators**. It combines the Business Model Canvas, the Value Proposition Canvas and contains 6 additional boxes to address the impact and the mission of your organization in order to make it more widely applicable and sustainable in the long-run.

ABOUT

PURPOSE

The Business Value model is a **core framework when making decisions or developing solutions for communities**. The canvas helps to systematically align ecosystem needs with sustainable models, ensuring that every initiative is both impactful and viable. The canvas brings together aspects crucial to marketing & communications, operations, finances, impact monitoring, and sustainability.

The addition of the **link between the value propositions, the ecosystem and the impact** in this canvas makes the **organization's overview more comprehensive for both internal and external use with stakeholders**. It assists social innovators to reinforce their **unique business points** while at the same time encouraging standard businesses to consider and have a conversation around **purpose and impact**. The newly added dimensions modernize the canvas for systemic thinking, sustainability and future-resilience.

FOR WHOM

Applicable to **B2C, B2B, for-profit and for non-profit organizations**, or any form of **social innovation entity** that wants to establish and run an organization or a project.

WHEN TO USE

The Business Value Model Canvas can be used as many times as needed, in the lifespan of an organisation. It is handy to **revisit and rethink** all parts of your business and its impact on a ~6-12-months basis. It is especially useful when facing a challenge or when coming up with ideas on expanding and pivoting. Visualizing the model with the canvas **assists you in seeing the bigger picture - now and in the future**.

WHAT IS INCLUDED IN THE TOOL?

- A visual Business Value Model canvas (available in various file formats)
- A table with the key terms and how they can be interpreted for different entities, including prompts and suggestions on what to address in each structure.

View and download your preferred format in the [public folder here](#).

Find all CRAFT tools as well as links to other useful resources and a directory of community members in our [Active-Peer-to-Peer-Academy](#).

CREDITS

Based on Original Canvas Design by Strategyzer:

- Source BMC: <https://www.strategyzer.com/library/the-business-model-canvas>
- Source VP: <https://www.strategyzer.com/library/the-value-proposition-canvas>

BUSINESS VALUE MODEL CANVAS

for social innovation actors and multipliers

ROOT PROBLEM

What problem(s) are you solving?

START WITH YOUR
WHY

PURPOSE

What do you want to do as a social innovator?

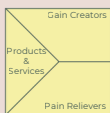
KEY PARTNERS

KEY ACTIVITIES

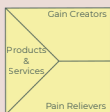
VALUE PROPOSITIONS

TARGET GROUP SEGMENTS CLIENT & END USER

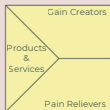
TARGET GROUP RELATIONSHIPS



INNOVATION



KEY RESOURCES & TECHNOLOGY



WELLBEING & INTERGENERATIONAL PERSPECTIVES

CHANNELS

ECOSYSTEM INFLUENCES

(considerations, unintended)

ECOSYSTEM CONTRIBUTION

(systems thinking, intended)

IMPACT COSTS

(acknowledgements, risks, long-term effects)

POSITIVE IMPACT

(social, environmental, operational)

COST STRUCTURE

REVENUE STREAMS

BUSINESS VALUE MODEL CANVAS

for social innovation actors and multipliers

TERM	ORIGINAL DEFINITION by Chesbrough and Spohrer (2003) Strategizer	B2C ORGANIZATION startup/SME/corporation	B2B ORGANIZATION startup/SME/corporation	NON-PROFIT ORGANIZATION non-gov. org, organization	SOCIAL INNOVATION varied/mixed
VALUE PROPOSITIONS	The value your organization promises to deliver by solving a problem or fulfilling a need.	Consider focusing on personal problems or enhancing lifestyle addressing directly the customer.	Improve efficiency, revenue, compliance, or cost savings, while still having the end user in mind.	Accurate providing social value (education, health, advocacy) rather than financial gain.	Clarify what makes you stand out and how it relates to clients, users, ecosystem.
Jobs	A task to achieve or a problem or need that a person aims to solve.	Everyday tasks, needs, or desires part of the customer journey.	Usually professional or operational tasks.	Primarily social challenges; the organization seeks to address.	Can vary greatly, complex social-ecological goals.
Pains	Negative experiences, risks, or obstacles before, during, or after trying to get a job done.	Address frustrations or inefficiencies in daily life.	Operational inefficiencies, regulatory issues, constraints or how to better serve the end user.	Root causes of societal issues; institutional-govern, or stakeholder resistance.	Systemic barriers, social exclusion, or cultural resistance to change.
Gains	The positive outcomes or expected, desired, or surprising benefit your solution provides.	Functionalities, basic requirements, features, support, status, etc.	ROI, improved KPIs, reduced risk, better decision-making.	Varies greatly; try to be specific about positive social outcomes, awareness, capacity building, etc.	Think about shifting norm, empowerment, equity, evidence, representation.
Products & Services	The offerings your organization delivers.	Commonly tangible products, apps, services for individuals.	Primarily platform, tools, consulting, integrated services.	Programs, campaigns, aid, training, outreach, etc.	Combined offerings, co-created solutions, experimentation.
Pain Reliever	How your offerings reduce or eliminate pains.	Relate to real primary research insights from your customer.	Enable to clear process optimizations or new approaches.	Contribute to barrier removal, policy change, funding access.	Contribute to system redesign, mindset shifts.
Gain Creators	How your offerings produce or ensure gains or benefits.	Highlight your unique points, personalization, speed, aesthetic.	Highlight what makes you stand out, analytics, automation, support.	Highlight what makes you stand out and how it is delivered.	Highlight what makes you stand out, societal gains.
TARGET GROUP SEGMENTS CLIENT & END USER	Originally 'Customer Segments' defining different groups of people or organizations your business aims to serve.	A 'target group' can be both the physical and end user. Look into demographics, lifestyle, journeys and personas.	The 'target' is a business client. Take into account business size, industry, department roles. It is useful to be aware of their end users.	The 'target group' can vary depending on stakeholder types involved - beneficiaries, funders, volunteers, partners.	'Target group' segments can be very diverse and clustered by other characteristics, (community, stakeholder).
TARGET GROUP RELATIONSHIPS	Originally 'Customer Relationships' referring to types of relationships you establish with each customer segment.	Similar to the original version, consider how the customers as clients and end users.	Address primarily the business client' preferred ways of interaction while being aware of their process towards end users.	Consider wider range of stakeholder engagement, transparency, trust-building and documentation.	Address both customer and end users as well as ways for collaboration or collective ownership.
WELLBEING & INTERGEN. PERSPECTIVES	NA	Consider long-term human and environmental wellbeing across generations (physical/emotional health, sustainable consumption, perceptions, language, etc)	Consider long-term human & environmental wellbeing across generations (employment, climate justice, access, operations and supply chains)	Consider long-term human and environmental wellbeing across generations (equity in program design, climate justice, access).	Consider long-term human and environmental wellbeing across generations (balancing current needs with future resilience and justice).
CHANNELS	How your value proposition is delivered to and reaches customers (communication, distribution, sales).	SAME AS ORIGINAL, consider digital and online aspects (online stores, mobile apps, ads).	SAME AS ORIGINAL, sales teams, partnerships, events, trade shows, etc.)	SAME AS ORIGINAL, plus community centers, outreach, advocacy platforms and access to language difficulties.	SAME AS ORIGINAL, but incorporate grassroots networks, public forums or storytelling.
KEY PARTNERS	Outside entities that help you operate your business model (suppliers, alliances).	SAME AS ORIGINAL, consider suppliers, marketing and influencers, logistics providers, funding providers, etc.	SAME AS ORIGINAL, consider distributors, software vendors, industry alliances.	SAME AS ORIGINAL, consider governments, donors, local NGOs, academic and research institutions, etc.	SAME AS ORIGINAL, often unconventional collaborations: academia + tech + academia + government + competition.
KEY ACTIVITIES	The most important tasks your business must perform to deliver value.	SAME AS ORIGINAL, especially marketing, product development, customer service.	SAME AS ORIGINAL, especially sales, fundraising, account management, R&D.	SAME AS ORIGINAL, especially advocacy, fundraising, training, community work.	SAME AS ORIGINAL, especially policy, ecosystem building, capacity sharing, policy envov.
INNOVATION	NA	The role of new ideas, tools, and methods in delivering or enhancing value.	The role of new ideas, tools, and methods in delivering or enhancing value.	The role of new ideas, tools, and methods in delivering or enhancing value, plus inclusion and speed of response.	The role of new ideas, tools, and methods in delivering or enhancing value or building trust with others.
KEY RESOURCES & TECHNOLOGY	The critical assets needed to deliver your value proposition. (CRAFT highlights the consideration of technological resources)	SAME AS ORIGINAL, incl. (raw) materials, brand, tech, staff, customer data, etc.	SAME AS ORIGINAL, incl. (raw) materials, CRM systems, knowledge base, expert staff.	SAME AS ORIGINAL, incl. volunteers, local networks, credibility and donor trust, funding, staff, tools, etc.	SAME AS ORIGINAL, incl. community knowledge, legitimacy, flexible funding, test users, etc.
ECOSYSTEM INFLUENCES (considerations, unintended, ext. pressures)	NA	External forces or ripple effects that may negatively affect or constrain the model (trends, media backlash, environmental policy, resource use, etc)	External forces or ripple effects that may negatively affect or constrain the model (regulatory changes, market instability, resource supply chains, climate legislation, etc.)	External forces or ripple effects that may negatively affect or constrain the model (political will, societal funding, mission drift).	External forces or ripple effects that may negatively affect or constrain the model (system complexity and pushback).
ECOSYSTEM CONTRIBUTION (Systems Thinking, intended)	NA	Positive value the model contributes beyond its core beneficiaries (consider circular economy practices, local employment, nature).	Positive value beyond its core beneficiaries (industry standards, inclusive supply chains, climate leadership, etc.)	Positive value beyond its core beneficiaries (advancing civil society, capacity development, nature & progress, balance).	Positive value beyond its core beneficiaries (policy influence, community building, alignment with nature).
IMPACT COSTS (acknowledgements, risks, long-term effects)	NA	Social, environmental, and hidden costs (overconsumption, mental health effects, e-waste, inequality from pricing).	Social, environmental, and hidden costs generated by the model (carbon emissions, exploitative labor, extractive data practices).	Social, environmental, and hidden costs generated by the model (volunteer burnout, dependency, unintended social exclusion).	Social, environmental, and hidden costs generated by the model.
POSITIVE IMPACT (social, environmental, operational)	NA	Deliberate, measurable social or environmental value created (incorporate monitoring and customer involvement).	Deliberate, measurable social or environmental value created (define, monitor and satisfaction, partners' support).	Deliberate, measurable social or environmental value created (short-term aid and long-term sustainable goals).	Deliberate, measurable social or environmental value created (civil society, regeneration).
COST STRUCTURE	All costs involved in operating your business model.	SAME AS ORIGINAL, often with priority on production, marketing, distribution costs.	SAME AS ORIGINAL, consider also salesforce, support, infrastructure.	All costs in planning, executing and documenting your model or project, incl. program delivery, admin, grant compliance.	All costs, considering not only what costs you money, but also time, effort towards blended finance, collective labor.
REVENUE STREAMS	The income generated from each customer segment, or specific value proposition.	SAME AS ORIGINAL, per client segment and proposition, primarily from product sales, subscriptions, ads.	SAME AS ORIGINAL, per client and offering, often incl. licensing, securing contracts, donor projects.	Many non-profit orgs rely only on donations, grants, public funding, so co-creating, incorporating more self-automating processes.	SAME AS ORIGINAL, for client and end user, often hybrid co-funding, micro-grants, membership.

*Use the suggested interpretations based on CRAFT project insights at your own responsibility and judgement.

UNDERSTANDING THE TOOL

BUSINESS VALUE MODEL CANVAS

HOW TO USE IT?

PRACTICALITIES & PREPARATION

The Business Value Model Canvas is a tool you will keep coming back to. Therefore it is best to use it in an easily accessible, collaborative format, where you can work and expand on it individually, with the team or with external stakeholders. Keep a **working version** and a **current clean version** which you can use for communication purposes. To fill in the Canvas for the first time, you don't need too much preparation upfront, besides gathering the key people to brainstorm and discuss it with. After that, you will have more questions to research.

When working, refer to the suggested interpretation of terms for examples on what could be filled in each box, depending on your entity structure.

STEP 1

Start with your **WHY**, because it is always good to have it as a reminder on the reasons that drove you into action. It is also often inspiring and important for stakeholders or clients to relate to. Your WHY consists of a **'Problem'** that you are tackling and a **'Purpose'** which can later become your **"Mission"**. Up next you can either follow the recommended steps in order or continue with the boxes you have most input on. Do not skip a box!

STEP 2

Your organization's **'Value propositions'** are the most crucial piece at the center of the canvas. If you need to define or refine them, use the Value Proposition Canvas incorporated within. Keep in mind that your value propositions can vary a bit per target group, but you should be able to have one clear general value proposition.

'Target group segments: client & end user' is a box where you need to establish the main target groups that you want to engage with and provide your offerings to. These target groups can be B2C, B2B or varied. However be mindful if they are in reality also the end users of your solution. If that is not the case, even if you don't have direct contact with the users, it's good to be aware of their preferences and experiences. This is why next we look at **'Target groups relationships'** and more specifically what steps they go through in their journeys and what relationship you need to build in the short and long term. In order to do that you select the most suitable **'Channels'** - what tools, places, systems you use to get in touch, stay connected and deliver value.

The **'Wellbeing & Intergenerational perspectives'** box aims to spark your considerations on the effects of your proposition on a person's physical and mental state, which can vary by age or other factors.

STEP 3

Next list the **'Key activities'** to bring your offering to life. This often requires **'Key resources & Technology'** to make it happen. The newly added **'Innovation'** box can help you outline and incorporate your unique contribution as a social innovator when presenting and putting your value model in practice. Last but not least, on this side of the canvas map out **'Key partners'** that you need to work with in order to have smooth and sustainable operations.

STEP 4

The **'Ecosystem influences & contribution'** are new boxes for the organization's unintended and intended effects that your model contributes to beyond its core beneficiaries. They relate closely to the **'Impact costs'** and **'Positive impact'** where you can distinguish how exactly and how much of a change you actively drive and monitor.

STEP 5

The **'Costs'** and **'Revenue streams'** boxes represent the financial structure of your organization. Monetary costs can be fixed or flexible, one-time or recurring over a period of time. Be mindful if you have other costs in terms of time or effort. Regarding revenue streams, you need to outline all ways of obtaining revenue, funding or other forms of support.

STEP 6

Does it all work out together? What new ideas can you come up with? What challenges and risks do you foresee? Keep refining over time and after any significant change in your operations or positioning.

APPLYING THE TOOL

BUSINESS VALUE MODEL CANVAS

TIPS

- Depending on your organization's entity or project type, get inspired by the **'Suggested Term Interpretations'** table. Often, when using tools and canvases, it is best not to take the wording as set in stone, but rather adapt it to your context. This canvas has proven very handy even to unconventional entity structures.
- You can explore your **'Why'** with the **'Golden Circle'** by Simon Sinek.
- **Clarifying and communicating the business value** is crucial for both external and internal alignment. It is recommended to **revisit or update** the model every 6-12 months or at key pivotal moments.
- You can connect the **'Client & End user segments'** box with the [Inclusive personas tool](#).
- When just starting a business or initiative, **don't get held back if you don't have all the answers**. Over time the model becomes clearer and more complete.
- If you are an already well-established organization, **use this canvas to zoom in and out as necessary to improve parts of your operations, your impact or to plan for future risks and opportunities** according to new trends and developments in your field.
- Don't hesitate to **seek assistance with facilitation** from local or CRAFT experts and community members.
- If you are hosting a session or team with a limited English capacity, we recommend to translate the canvas or at least **share the explanations of the terms upfront** in the best suitable language for your audience (within the APPA community we collect resources in various languages).
- Feel free to **transfer the canvas in a collaborative tool** or format where everyone can interact with it and edit over time.

"This tool was a strong starting point for aligning our product development with real customer needs. It helped us structure our business model in a more purpose-driven way and move beyond simply describing features. The integrated approach allowed us to see how our technology fits within a broader social impact ecosystem. It was very useful during pitch preparation and product validation."

FIND MORE ADDITIONAL RESOURCES
on the Active-Peer-to-Peer-Academy of CRAFT



IMPACT BUSINESS PLAN CHECKLIST



Purpose



Sustainability



Systems
Thinking



Ethics &
Transparency

NAVIGATING THE TOOL

IMPACT BUSINESS PLAN CHECKLIST

The Impact Business Plan Checklist helps you craft a **business plan that clearly highlights your impact**—customized to the impact model you use. Moreover it offers **descriptions of various impact models** to support your decision making process.

ABOUT

PURPOSE

This tool helps you build a business plan that showcases how your model creates value for stakeholders and the planet and how you will bring it to life in practice—whether to sharpen your strategy, align your team, or engage investors and partners.

FOR WHOM

Entrepreneurs building impact-focused ventures—whether developing your first business plan or clarifying your impact as you update and refine your existing plan.

WHEN TO USE

Use this tool once you've mapped your idea with the Business Model Canvas and want to move from model to a concrete plan for action.

WHAT IS INCLUDED IN THE TOOL?

- Common Impact Business Models
- Impact Business Plan Checklist (available in various file formats)
- Tips to further customize your business plan according to your chosen impact model

View and download your preferred format in the [public folder here](#).

Find all CRAFT tools as well as links to other useful resources and a directory of community members in our [Active-Peer-to-Peer-Academy](#).

CREDITS

Based on: [Exploring Effective Social Enterprise Business Models: A Path to Impactful Sustainability by IED](#), [9 Business Model Examples for Social Entrepreneurs by ChangeCreator](#), [Business Models of Social Entrepreneurs - Reporting in Social Entrepreneurship by Wolfgang Spiess-Knafl](#), and the [Green Business Model Navigator by CSCP](#).

Checklist based on the: "eCommerce Business Plan Checklist" by Shopivo.

Source: <https://www.shopivo.com/blog/templates/e-commerce-business-plan-checklist/>
Social Enterprise Business Plan Template by tools4dev.

Source: <https://tools4dev.org/resources/social-enterprise-business-plan-template/>

IMPACT BUSINESS PLAN CHECKLIST

Impact Business Models

There are many ways for impact ventures to create social and environmental value. The list below highlights common business models through which ventures generate value for intended beneficiaries—be they customers, users, communities or the environment.

Model	Description	Choose this model if:	Examples
Fee-for-Service / Pay-As-You-Go	Intended beneficiaries pay directly for products or services, typically with pricing designed for accessibility.	...your business enables access to essential services like healthcare, education, or clean energy by offering accessible pricing or distribution models.	<i>Education platforms with tiered pricing Pay-as-you-go solar solutions for off-grid communities</i>
Marketplace and Platform Models	(Online) platforms that connect producers or service providers with consumers or markets.	...you help small producers or service providers reach customers, often through ethical sourcing or fair trade practices.	<i>Fair trade marketplaces, platforms linking small farmers to urban markets Job-matching services for marginalised workers</i>
Cross-Subsidisation (Robin Hood Model)	Revenue from higher-paying customers or products is used to subsidize access for underserved groups.	...you make offerings affordable for underserved users by generating revenue from premium customers or higher-margin services.	<i>Buy-one-give-one brands Premium product sales funding free or low-cost services</i>
Inclusive Employment & Empowerment	Businesses that create meaningful work opportunities for marginalized groups, often with training and pathways to advancement.	...you offer employment or training to people facing employment barriers, aiming for long-term inclusion and empowerment.	<i>Social enterprises that employ refugees, formerly incarcerated individuals or people with disabilities.</i>
Cooperative and Community-owned Models	Businesses owned and governed by members—such as employees, customers, or local residents—who share profits and decision-making power.	...you aim to empower communities through shared ownership and democratic control, strengthening local economies and stakeholder participation.	<i>Worker cooperatives, community-owned renewable energy projects, local farming cooperatives</i>
Tech for Impact	Using scalable tech solutions (e.g. AI, data platforms) to tackle social or environmental issues.	...you are building tech-enabled solutions to improve access, efficiency, or outcomes in areas like health, education, or sustainability.	<i>AI-powered healthcare diagnostics for low-income areas, mobile platforms for education, clean energy management using AI</i>
Environmental and Climate Tech Models	Ventures that reduce environmental harm, support climate action, or regenerate ecosystems, e.g., with technology, circular practices, or nature-based solutions.	...your business is focused on tackling environmental challenges or enabling a more sustainable future, whether through innovation, resource efficiency, or restoration.	<i>Circular economy businesses (e.g. recycling/upcycling) Renewable energy startups Carbon capture technology</i>
Advocacy and Awareness	Businesses that raise awareness, shift public opinion or behavior, or advocate for policy change on social or environmental issues.	You aim to influence attitudes, mobilize communities, or push for policy change through your product, service, or platform.	<i>Charity-branded products that fund social causes Platforms that use sales to promote environmental awareness or social justice</i>

IMPACT BUSINESS PLAN CHECKLIST

The Impact Business Plan Checklist

The checklist below outlines the core components of a business plan—including impact essentials to help you clearly show how your business model creates the impact you intend.

Executive Summary

- Business name and location
- Mission statement
- Overview of product/service
- Impact vision & goals
- Summary of financial outlook and funding requirements

Company Description

- Company history
- Problem statement and solution
- Contribution to societal / environmental challenge
- Key milestones

Market Analysis

- Target market and demographics
- Market needs and trends
- Competitive analysis
- Importance of the societal / environmental challenge
- Industry analysis

Organization and Management

- Organizational structure
- Leadership team profiles
- Advisory board and stakeholders
- Key roles and responsibilities

Products or Services

- Detailed product/service description
- Social impact aspects of the product/service
- Unique value proposition
- Development stage and roadmap

Sales and Marketing

- Marketing strategy
- Sales strategy
- Customer acquisition plan
- Community engagement and advocacy
- Brand positioning and messaging

Impact Plan

- Impact objectives and goals
- Analysis of the social/environmental problem
- Impact measurement metrics and tools
- Reporting and transparency practices
- Stakeholder engagement and feedback
- Case studies or examples of expected impact

Funding Request

- Total funding requirements
- Use of funds breakdown
- Funding sources (grants, donations, investments)
- Funding timeline

Financial Projections

- Revenue models
- Break-even analysis
- Profit and loss projections
- Cash flow projections
- Social Return on Investment (optional)

Appendices

- Additional supporting documents
- Research data and references
- Resumes of key team members
- Letters of support or partnership agreements
- Legal documents (if applicable)



UNDERSTANDING THE TOOL

IMPACT BUSINESS PLAN CHECKLIST

HOW TO USE IT?

This tool helps you **move from a strong idea to an actionable plan for building your impact business**. You'll start by refining your thinking through the lens of different **impact business models**, then **use the checklist to structure your plan**, and finally **tailor key sections based on the model you're using**.

PRACTICALITIES & PREPARATION

Decide whether to develop your business plan as a **presentation or written document**, depending on your goals and audience (e.g., to sharpen your strategy, align your team, or engage investors and partners).

STEP 1

Start by **reviewing the list of impact business models to refine your thinking - see pages 19 and 22-29**.

These models reflect common ways impact ventures deliver value for stakeholders and the planet.

Identifying the model that best matches your current or intended approach will help clarify your thinking before diving into the plan.

STEP 2

Review the Impact Business Plan Checklist and gather inputs

Read through the checklist to understand what you'll need to include. Then gather relevant inputs from other tools you've used, such as:

- [Business Value Model](#): defines the core of your model to expand upon in the plan
- [Inclusive Personas](#): informs your target market segments, product design, and marketing
- [System Problem Tree](#), [Ecosystem Theory of Change](#), and [Impact Scan](#): form the basis of your impact plan
- [Purpose Cost Breakdown Model](#) and [Purpose Revenue Model](#): feed into your financial projections

STEP 3

Customize for your impact business model

Review the tips for **tailoring your business plan** based on **your chosen impact business model** (see index).

As a general guide: if your intended beneficiaries participate directly in an area of your business, describe how you will enable positive change for them in the relevant sections of your plan. Examples: if intended beneficiaries are employees, describe how you'll recruit, support, and retain them in your Organisation and Management section; if they are customers, highlight how your offering addresses specific needs of underserved groups in your Market Analysis, Product or Services, and Sales & Marketing section.

STEP 4

Write your business plan, embedding impact throughout

With a **clear structure and supporting materials in place**, you're ready to develop your plan. Use the core checklist as your foundation, and draw on the model-specific tips to embed your impact throughout—turning your idea into a compelling roadmap for action.

APPLYING THE TOOL

IMPACT BUSINESS PLAN CHECKLIST

TIPS

- A good model shows **how you will deliver enough value to keep people engaged and how you will generate enough income to sustain your work**—whether your goal is to break even or make a profit. Use the common models for inspiration, but adapt them to fit your purpose. Talk your ideas through with others, and keep in mind that some models may align better with certain legal structures.
- If you are an **NGO, start where you are**. Think through **how revenue-generating activities fit your mission and current capacity**. You don't need to reinvent everything at once—many NGOs begin by testing a small earned-income stream that supports their existing work. You'll learn what works and what may need to shift over time.
- Use the checklist **flexibly**. It's not about ticking every box—it's about using the structure to clearly show how your business will create and sustain impact. **Make it your own**.
- Business plans come in **many forms**. Your plan doesn't need to be a long document. It might be a pitch deck, a short narrative, or a more detailed plan depending on your needs. The key is to make it **clear, coherent, and usable**—something that helps you (and others) understand how your venture/ initiative works.
- **Find inspiration in your network**. Learn from social enterprises, cooperatives, NGOs with earned income, and tech-for-good ventures. Ask around—sector associations, networks, and events can be great places to hear what's working for others and what lessons they've learned. Then adapt what fits your context.

"It provided a clear structure for developing our business plan, ensuring we cover all key aspects, from market analysis to sustainability goals. And it helped us explore and refine innovative business models, making our zero-waste store and sustainable food production more competitive and impactful."

TIPS: FEE FOR A SERVICE/ PAY AS YOU GO

Focus on:

Delivering a **high-quality service** to beneficiaries

Showing how the **service improves lives and addresses social challenges**

Measuring **impact and customer satisfaction**

Key difference in the business plan:

Impact-focused service

Your success depends on the **way of your service delivery, how it is different and how it leads to measurable social impact** for beneficiaries.

How to adjust your business plan:

Section	Action	Hands-on tips
Executive Summary	Describe the service, target audience, beneficiaries and social issue in detail.	Use numbers, statistics and current trends to make a compelling case.
Social Impact Plan	Focus on how the service directly improves the beneficiaries' lives and explain your impact measurement process.	Use some key metrics: <i>Number of beneficiaries served, customer satisfaction scores, health or education outcomes.</i>
Products or Services	Provide a detailed breakdown of the service and how it is tailored to benefit your target customers (e.g. underserved segments).	Consider tiered pricing or a freemium model to attract a broad range of customers while funding core social impact work.

Prompts & questions to help:

- Who are your paying customers and what social issue are you addressing?
- How will you deliver the service, and what is the expected impact on your beneficiaries?
- How will you maintain quality while scaling, and what metrics will you use to measure your social impact while maintaining affordability and customer satisfaction?
- What risks do you foresee in maintaining consistent service quality while scaling, and how will you address them?

TIPS: MARKETPLACE OR PLATFORMS

Focus on:

Connecting producers and consumers, especially marginalised or underserved suppliers

Fair trade practices to improve market access for conscious suppliers

Creating value through ethical sourcing

Key difference in the business plan:

Market access

Your success depends on **providing market access** by connecting efficiently underserved, ethical producers with consumers.

How to adjust your business plan:

Section	Action	Hands-on tips
Market	Provide details on how the market currently operates and how your solution provides advantages to the underserved.	Use recent market research , adjust to the geographies you (plan to) operate in, highlight key trends .
Social Impact Plan	Describe how your marketplace improves the lives of the producers you serve and provide details on your social impact measurement.	Use some key metrics: <i>Producer income growth, transaction volume, consumer satisfaction, marketplace reach (number of producers/consumers).</i>
Products or Services	Focus on how you differentiate through fair trade or ethical sourcing and how it benefits producers.	Use labels that are well-known, e.g. <i>apply for B-Corp certification or refer to international standards.</i>

Prompts & questions to help:

- How will you connect underserved producers with customers, and what value will your platform provide?
- What is your strategy for ensuring that both producers and consumers benefit?
- How will you measure success in terms of economic and social outcomes for the producers you serve?
- What partnerships can you form to strengthen your marketplace's reach and credibility?
- What risks could arise in managing relationships between producers and consumers, and how will you address them?

TIPS: CROSS-SUBSIDISATION MODELS

Focus on:

Using revenue from **higher-margin customers** to support underserved communities

Strong focus on **balancing the financial sustainability & quality of offering**

Keeping in **alignment with the social mission**

Key difference in the business plan:

Revenue distribution

Your success depends on the **balance between the quality of services provided and subsidised offerings** for maximising social impact.

How to adjust your business plan:

Section	Action	Hands-on tips
Executive Summary	Illustrate with examples how revenue from premium customers supports services for low-income beneficiaries.	Focus on use cases , provide real-life examples and cost-benefit calculations .
Marketing and Sales Strategy	Provide practical details on how you will serve both premium and underserved customer segments.	Highlight the key benefits and advantages for both groups.
Social Impact Plan	Describe how cross-subsidisation allows you to scale your impact among disadvantaged groups and outline your impact metrics.	Use some key metrics: Number of subsidised beneficiaries, revenue from premium customers, access to services for low-income groups, social return on investment.

Prompts & questions to help:

- How will you balance the needs of premium customers with the goal of subsidizing underserved communities?
- How will you communicate the value of the premium service to maintain brand equity and attract high-end customers?
- What pricing model will you use to ensure sustainability while maximizing impact?
- How will you measure the effectiveness of your cross-subsidization strategy?
- What challenges do you anticipate in maintaining financial sustainability while serving low-income customers, and how will you mitigate them?

TIPS: INCLUSIVE EMPLOYMENT MODELS

Focus on:

Focus on **creating job opportunities**

Focus on **training** for disadvantaged or marginalised communities

How **employment** contributes to **long-term empowerment** and social change.

Key difference in the business plan:

Empowerment

Your success depends on the **empowerment of disadvantaged employees** by providing them with opportunities for **social mobility**.

How to adjust your business plan:

Section	Action	Hands-on tips
Executive Summary	Explain the inclusive employment model and how job creation solves a social issue (e.g. unemployment, underemployment).	Focus on using real-life examples and current labour market data . E.g. use Eurobarometer statistics.
Organization and Management	Detail how you will source, train and support employees from marginalised backgrounds including risk mitigation.	Add how you will support employees through mentorship, benefits and ongoing development programmes after initial training.
Social Impact Plan	Describe how you will measure the social outcomes for employees (e.g. career progression, income increase).	Use some key metrics: Number of jobs created for disadvantaged groups, employee retention rate, training completion rates, income growth for employees.

Prompts & questions to help:

- How will your hiring strategy empower disadvantaged groups?
- What specific training and support will you provide to help employees succeed?
- How will you measure success in terms of employee growth and broader social impact?
- How will you ensure long-term employee retention and growth, especially for employees facing significant barriers?
- What risks do you foresee in scaling your employment model, and how will you address them (e.g., training costs, retention challenges)?

TIPS: COOPERATIVE & COMMUNITY MODELS

Focus on:

Community
ownership

Reinvestment of
profits locally

Shared values
& collective
decision-
making

Key difference in the business plan:

Collective
ownership

Your success depends on **engaging your members** to actively contribute to **creating shared value and social impact**.

How to adjust your business plan:

Section	Action	Hands-on tips
Company Description	Explain how the cooperative structure works, including member roles and benefits.	Add a visual of the governance structure such as a voting system or advisory board.
Social Impact Plan	Describe how shared ownership leads to community empowerment and improved local outcomes.	Use some key metrics: <i>Number of members/owners, profit redistribution, community engagement levels, improvements in local economic development.</i>
Financial Projections	Highlight how profits will be reinvested or redistributed among members.	Focus on adding numbers on financial sustainability and social return.

Prompts & questions to help:

- How will you structure the cooperative to ensure active participation and shared ownership?
- How will profits be distributed or reinvested for social good?
- How will you measure success in terms of community empowerment and social outcomes?
- How will you ensure that decision-making within the cooperative is inclusive and transparent for all members?
- What risks could arise from collective decision-making or managing shared ownership, and how will you navigate them?

TIPS: TECH FOR IMPACT & DATA-DRIVEN MODELS

Focus on:

Tech-enabled scalability

Use of data-driven approaches

Leveraging new technological breakthroughs

Key difference in the business plan:

Tech-enabled scalability

Your success depends on the **effective and efficient use of technology** to deliver social **impact at scale**.

How to adjust your business plan:

Section	Action	Hands-on tips
Executive Summary	Explain how your technology or platform addresses a social issue and the scalability of your solution.	Make sure to address current trends and ethical dilemmas of the use of new technologies (e.g. GenAI).
Social Impact Plan	Define and showcase the metrics you will use to measure the social impact delivered through technology. Connect them with SDGs wherever possible.	Use some key metrics: Number of users, social outcomes enabled by technology, technology adoption rate, data-driven impact improvements.
Products or Services	Describe how your tech innovation differentiates you from others and solves a specific problem for beneficiaries.	Add user feedback into your tech development to ensure improvements based on actual user needs.

Prompts & questions to help:

- What technology are you using, and how does it enhance your social impact?
- How will you scale your tech solution to reach more beneficiaries?
- How will you ensure your tech infrastructure is scalable without compromising long-term sustainability or user experience?
- What metrics will you use to measure the success of your technology-driven social impact?
- What risks do you foresee in deploying and scaling your technology, and how will you address them (e.g., data security, access to resources)?

TIPS: ENVIRONMENTAL & CLIMATE TECH MODELS

Focus on:

Environmental
sustainability

Circular economy
practices

Carbon footprint
of your activities

Key difference in the business plan:

Sustainable
operations

Your success depends on the implementation of a business model that is built around **reducing harm and achieving long-term sustainability.**

How to adjust your business plan:

Section	Action	Hands-on tips
Executive Summary	Describe how your business addresses current environmental challenges.	<i>Make sure to address greenwashing claims and how you will counteract.</i>
Social Impact Plan	Define the environmental impact metrics (e.g. carbon reduction) you will use to track your success.	<i>Use some key metrics: Carbon emissions reduced, waste diverted, energy savings, number of users/companies adopting green practices.</i>
Products or Services	Highlight the environmental benefits of your product/service, focusing on waste reduction, resource efficiency or sustainable sourcing.	<i>Consider conducting a Life-Cycle Assessment (LCA) to understand the full environmental impact of your products or services.</i>

Prompts & questions to help:

- How will your business model reduce environmental harm or promote sustainability?
- What circular economy practices will you implement, and how will they create value?
- How will you measure your environmental impact, and what benchmarks will you set?
- What regulatory or compliance risks might you face, and how will you navigate them?
- What risks do you foresee in scaling a sustainable business (e.g., supply chain constraints, cost of sustainability), and how will you address them?

TIPS: ADVOCACY & AWARENESS

Focus on:

Advocating for
social change

Awareness
raising

Driving public
engagement

Key difference in the business plan:

Cause-
centered
messaging

Your success depends on convincing your target audience about **promoting and advocating for social change, while also generating revenue.**

How to adjust your business plan:

Section	Action	Hands-on tips
Executive Summary	Focus on the social issue you advocate for, how your business promotes awareness and the expected impact.	Highlight and compare current methods , what works, what doesn't and how you are more efficient.
Social Impact Plan	Explain how you will follow up and measure the effectiveness of your advocacy efforts including the metrics you will use to follow progress.	Use some key metrics: Number of people reached, engagement rates (e.g. social media or campaign participation), policy changes influenced, donations raised or support mobilised.
Marketing and Sales	Provide details about your advocacy campaign strategy and how you'll engage the public.	Make sure you highlight the difference compared to current methodologies.

Prompts & questions to help:

- What cause are you advocating for, and how will your product/service raise awareness?
- What strategies will you use to engage the public and mobilize support for the cause?
- How will you leverage digital tools and social media to amplify your advocacy message and reach a broader audience?
- How will you measure the success of your advocacy efforts?
- What challenges could you face in driving public engagement, and how will you address them?



INCLUSIVE PERSONAS CANVAS



Purpose



Sustainability



Collaboration



Wellbeing



Diversity, Equity &
Inclusion



Systems
Thinking



Ethics &
Transparency

NAVIGATING THE TOOL

INCLUSIVE PERSONAS CANVAS

A persona is a prototypical model of a target group that aids a research/design/marketing process. The Inclusive Personas Canvas aids you to **create more realistic personas that focus on relationships, impact and values**, not just technicalities, numbers and sales targets. The canvas covers **two parts** - a **non-stereotypical persona profile** and an **Empathy map** for a specific scenario. Incorporating the Empathy map perspective adds depth and a solid ground for your findings and for your decision making.

ABOUT

PURPOSE

The goal of creating an inclusive persona is to **see the human side of things** and to enable/mitigate realistic scenarios. By utilizing this improved approach, **your personas are going to be more authentic, diverse and adaptable** over time. This version of the canvas includes **additional questions and perspectives** to consider. The **relationship-based strategy** enables your organization to **build trust and drive impact aligned with your values**.

Keep in mind that you can still create **multiple inclusive personas if you want to distinguish various target segments**. Additionally, the tool is enhanced and supported by a complementary Empathy map scenario(s) per persona depending on the relationship you want to build. The empathy map helps you to dive into a current experience versus your ultimate desired experience with a product, service or interaction.

FOR WHOM

The canvas is suitable for **any organizational or initiative structure**: B2B, B2C, gov. and non-gov. organizations, projects, social enterprises, etc. as well as individual or team work and research. It can be used to describe all kinds of persona profiles: clients, end users, investors, donors, volunteers, stakeholders, etc.

WHEN TO USE

The canvas is very versatile and can be used **at the beginning or throughout an ongoing initiative** or organization development. Personas are most commonly used **when identifying potential clients**, researching **end-user preferences**, or crafting **marketing and engagement strategies** for a new product, service or project. This tool can be beneficial when tackling **bottlenecks**, ideating approaches for **pivoting** as an entity or seeking to **expand** to new target groups. In some cases this canvas can also reflect how your offering is perceived by a new generation of clients or how your relationship with existing personas needs to change due to a major trend/shift in the field.

WHAT IS INCLUDED IN THE TOOL?

- Inclusive Persona Canvas (available in various file formats)
- Empathy Map (optional) complementary canvas (available in various file formats)

View and download your preferred format in the [public folder here](#).

Find all CRAFT tools as well as links to other useful resources and a directory of community members in our [Active-Peer-to-Peer-Academy](#).

CREDITS

Based on Original Canvas Design by Quest, source: <https://queststudio.be/tool/inclusive-personas/>

Empathy map canvas based on Original Canvas Design by Dave Gray from XPLANE for Gamestorming:

Source: <https://medium.com/@davegray/updated-empathy-map-canvas-46df22df3c8a>

INCLUSIVE PERSONA CANVAS

for any type of target group

(name of your target group)

OCCUPATION / JOB / CAREER

What could this person do?(optional: include various jobs)
What are their responsibilities?

CHARACTERISTICS / BEHAVIOR

What are the typical characteristics of this person?
How do they behave?

PRODUCTS & SERVICES

Which of your products and/or services does this person come into contact with?

COMMUNICATION PREFERENCES

How does this person like to be contacted?
What are their favorite channels?

CORE MESSAGE

How do you describe your organization and offering to this person?

GOALS

What does this person want to achieve?
What are their long- and short-term goals?

CHALLENGES

What challenges does this person encounter? Long- and short-term?

OBJECTIONS

What might stop this person from buying/engaging with your product or service?

INFLUENCES

What / who around them is influencing their decision? Who do they report to? Who reports to them? Which metrics are important to this person? How are their tasks measured? How does their social and economic position influence their decision making?

PROBLEM INVOLVEMENT

What is this person's relationship with the problem you want to solve? quote or score of involvement/being affected)

VALUES ALIGNMENT

Do this person's values and preferences align with your organization's purpose and goals? (sustainability & ecosystem)

COMPETITORS VIEW

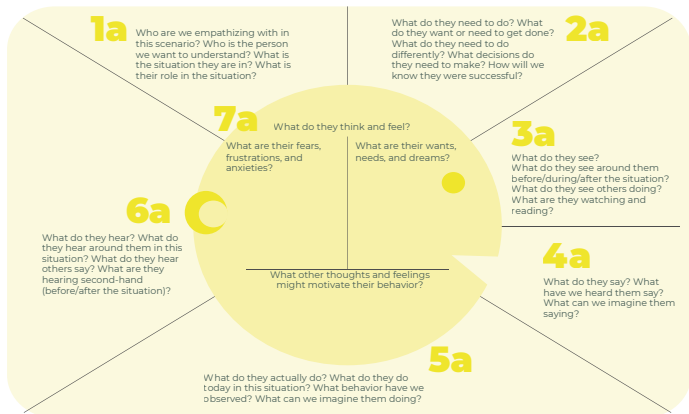
How do your competitors look at this persona? (quote their descriptions or message)

THE RELATIONSHIP WE WILL BUILD WITH THIS PERSONA IS....

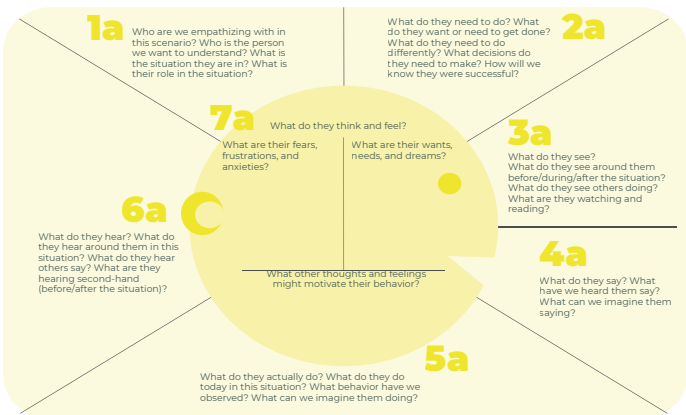
INCLUSIVE PERSONA: EMPATHY MAPS

complementary canvas

A EMPATHY MAP: scenario



B EMPATHY MAP: scenario



UNDERSTANDING THE TOOL

INCLUSIVE PERSONA CANVAS

HOW TO USE IT?

PRACTICALITIES & PREPARATION

Depending on your preferences, you can use the 'Inclusive Persona Canvas' individually, with a team or even organize a workshop discussion around it with more stakeholders. The canvas can be used with **minimal preparation and briefing** in order to collect fresh ideas, different perspectives and spark a conversation around the segments your organization wants to target.

Alternatively, if you wish to have a **more concrete end result**, we advise to **select a team** of that will be involved in defining the persona, review the tool and divide tasks for preliminary research. Keep in mind that you need input both from strategic and from practical representatives from the organization. To create a **realistic and well-rounded persona**, gather insights from **different sources**. You can do this by talking to people (through interviews or focus groups), observing their behavior, testing ideas with users, or using tools like surveys, data analysis, or even AI to explore patterns and trends. This process requires time and, in some cases, a few iterations.

Decide if you want to **create one or more personas** for your organization. Prepare **digitally interactive or printed copies** of the canvas. The 'Empathy map' page with the scenarios is optional, and usually **2 scenarios per 1 persona are sufficient at the start**. In case you have a more **detailed 'customer journey'**, you can opt to tackle more scenarios.

STEP 1

Start on the top of the main page and answer the **first 4 questions**. Feel free to add multiple answers and options per question since we don't need to stick to a stereotypical persona. You can opt to give a 'title' of your target group on top.

STEP 2

Check with the rest of your organization and fill in the **'Core message'** that you want to convey to your target audience.

STEP 3

Based on your research insights, fill in the **'Goals', 'Challenges', 'Objections' and 'Influences'**.

STEP 4

Evaluate and answer the last questions on **'Problem involvement', 'Values alignment', and 'Competitor view'**. Then you should be able to **formulate the type of relationship** you want to build with your persona, **how you want to achieve it and why it will resonate with them**.

STEP 5 (optional)

If it is difficult to answer a certain question or if you find yourself going back and forth adjusting information across the canvas page, it might be good to dive deeper into a specific scenario of the interaction journey with your persona. Use the optional canvas by following the arrow direction to answer the numbered questions. **Empathizing and placing yourself in the perspective of your persona** can unlock unexpected ideas or insights.

There are **3 options to use the Empathy maps**:

- Use Map A for the **'current experience'** of the scenario & Map B for the **'desired best experience'** of this scenario (for example interaction with your product, service or communication channel).
- Use both Map A & Map B to dive into **two different problematic versions** of the same scenario/journey step.
- Use Map A, Map B and if needed more copies to address the most important journey touch points with your persona.

APPLYING THE TOOL

INCLUSIVE PERSONA CANVAS

TIPS

- The most important thing to remember when creating personas is to **refrain from assumptions and expectations**. Collect and rely on real-life feedback, observation and data. In order to do that **apply secondary and primary research methods**:
 - questionnaires
 - interviews
 - focus groups
 - observations
 - other creative research methods for collecting insights.
- Connect this tool to the [Business Value Model Canvas](#). You can transfer your Inclusive Personas insights and approach to the **Client Segments & End Users box**.
- **Consider all aspects that generally get overlooked** or put aside as special cases, for example different types of disabilities or physical and mental wellbeing effects, representation, generational perception of certain language or visuals, vulnerable group specifics (children, elderly).
- When gathering insights for your personas, **refrain from leading questions**. Introduce yourself as someone not directly related to the solution or proposition in order to allow them to be honest and open to you when providing feedback.
- Personas are useful both for **for-profit and non-profit organizations**. If you are an NGO you can apply this tool for communication, for volunteer management, and even for team support and inclusion.

"The Inclusive Personas Tool has been highly useful for ensuring that our programs consider diverse stakeholders, from corporate volunteers to schools and local communities. It helps us design initiatives that are more accessible, relevant, and engaging for different groups."



TEAM MEMBER 'USER MANUAL' CANVAS



Purpose



Sustainability



Collaboration



Wellbeing



Diversity, Equity
& Inclusion

NAVIGATING THE TOOL

Team Member 'User Manual' Canvas

This adaptation of the Team Member User Manual **helps social innovators care for one another as whole beings**, creating fertile ground for **skills, capabilities, and collaboration** to flourish. It includes **wellbeing and impact lenses** to connect what team members **do** with what they **need to thrive** and **bring their best selves to the team**.

ABOUT

PURPOSE

The primary purpose of the Team Member User Manual is to **support clear communication about each team member's working style and personal preferences**. It helps foster mutual understanding and identify the dynamics that enable the team to work effectively together.

FOR WHOM

This tool is especially useful for **new teams or those undergoing transitions**. It should be reviewed and updated regularly—particularly during periods of growth—to ensure it remains a relevant guide for team interactions.

WHEN TO USE

The manual is designed for use **after team members have been selected**. It can be a powerful tool for building cohesion, especially to onboard members, before working with business, financial, or impact tools—and also as part of regular team reflection and development.

WHAT IS INCLUDED IN THE TOOL?

- A visual template for team members to create their "user manuals"
- Guide to running a Team Member User Manual workshop in which to create and share the manuals

View and download your preferred format in the [public folder here](#).

Find all CRAFT tools as well as links to other useful resources and a directory of community members in our [Active-Peer-to-Peer-Academy](#).

CREDITS

Based on Original Canvas Design by Cassie Robinson:

Source: <https://cassierobinson.medium.com/a-user-manual-for-me-d3a851fbc694>

Additional sources:

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TEAM MEMBER 'USER MANUAL'

NAME:

DATE:

1 ABOUT ME

When I started working here
Where I'm from
Where I live
My type (e.g., Belbin, DISC, MBTI)

2 WHEN & HOW TO REACH ME

Where do I work from (home, office, hybrid)?
Working time? (part time vs. full time, days and times)
Preferred times for meetings and communication? How to reach me when an urgent matter arises?

3 WHAT GIVES ME PURPOSE

What values are important to me?
What causes or issues (e.g., SDGs, doughnut categories) do I care about the most?
What impact do I want to make?

4 MY ROLE

MY SKILLS ADDING VALUE

SKILLS I WANT TO DEVELOP

OTHER SKILLS

5 WHAT HELPS ME BE MY BEST SELF

What practices are important for maintaining my mental and physical health?
What work-life boundaries do I set to maintain wellbeing?
How can the team respect and support these boundaries?
What signs might tell the team I might be feeling stressed?

6 WHAT HELPS ME FEEL INCLUDED

How can the team make me feel included and comfortable?
How do I like people to communicate with me?
Are there any activities I prefer to avoid or modify?
Do I have accessibility needs or emergency precautions the team should be aware of?

7 MY INTERESTS OUTSIDE OF WORK

What activities or hobbies do I enjoy outside of work?
My favorite book, movie, and/or series?
My favorite quote or personal motto?
A bucket list item I haven't done yet?



UNDERSTANDING THE TOOL

Team Member 'User Manual' Canvas

HOW TO USE IT?

PRACTICALITIES AND PREPARATION

Follow the steps below to have each team member create a short "user manual" that helps others understand how to work well with them. By sharing these manuals, the team builds stronger working relationships through clearer communication and mutual understanding.

STEP 1

Review the tool. Read through the Team Member User Manual template and the Workshop Guide (see next pages) to understand how the tool works.

STEP 2

Plan your workshop. Decide who will participate and schedule time for it – whether you run the workshop or have members fill in the manual individually and then share at a team meeting.

STEP 3

Prepare the materials. Choose whether team members will complete printed or digital templates. Plan where to store the completed manuals—select a shared, secure space like Google Drive, a company wiki, or Notion.

STEP 4

Run the workshop. Use or adapt the workshop guide to support your team in creating and sharing their manuals together.

STEP 5

Reflect and apply insights. Encourage team members to refer to the manuals regularly when navigating team dynamics. Also, use what you learn to strengthen internal practices. Consider how team insights can inform decisions about assignments, support structures, and HR processes.

STEP 6

Schedule regular updates. Set reminders to revisit the manuals periodically—during onboarding, performance reviews, or after major team changes. Encourage your team to treat the manual as a living document that evolves with time.

TEAM USER MANUAL

Workshop Guide (Part 1)

This workshop is designed to **help team members create their individual user manuals** while **getting to know each other better**. By working together to complete these manuals, the team can **improve communication, set healthy boundaries**, and appreciate each other's **unique needs and strengths**. This activity encourages **collaboration and empathy**, ensuring everyone's voice is heard and valued.

Prep Time: 30 minutes

Run Time: 40-60 minutes

Format: can be offline or online

People: 6-15

Step 1 – Check-in (5 mins)

Begin the workshop with a brief check-in. Ask each participant to share a word or phrase that captures their current state of mind. This helps set a reflective and present tone for the session.

Step 2 – Introduction to the User Manual (5 mins)

Introduce the concept of the user manual and its purpose in fostering better team understanding and communication. Emphasise that this session is about sharing needs, preferences, and strengths in a supportive, judgement-free environment.

Step 3 – Reflect and Jot Down Key Points (10-12 mins)

Hand out paper (or ask them to get some paper or open an empty Google Doc) and ask participants to reflect on the following areas using the prompts:

- **About me:** Basic details and any extra information they're comfortable sharing.
- **When and how to reach me:** Working hours, locations, and communication preferences.
- **What gives me purpose:** Core values and desired impact in the world.
- **What I do:** Role in the organization and skills.
- **What helps me be my best self:** Personal care needs and how the team can support them.
- **What helps me feel included:** Accommodations and practices that ensure they feel included.
- **My interests outside of work:** This part is for fun!

Encourage participants to write down one or two key points for each.

TEAM USER MANUAL

Workshop Guide (Part 2)

Step 4 – Pair and Share (10 mins)

Ask participants to pair up (create breakout rooms if online), ideally with someone they don't usually work closely with. Each person shares their reflections, discussing how these needs and preferences can be supported by the team.

Step 5 – Create Your User Manual (10 mins)

Participants now start compiling their user manuals, focusing on the sections they've reflected on. They can include additional sections like hobbies or interests if they wish. Encourage creativity and personalisation.

Step 6 – Group Sharing and Discussion (10-15 mins)

Reconvene as a whole group. Invite volunteers to share highlights from their user manual, focusing on what they believe is most important for the team to know.

Step 7 – Manual Wall (5 mins) - different online vs offline

If participants are comfortable, create a "User Manual Wall" where they can display their completed manuals or key points. This serves as a visual reminder of the team's collective strengths and needs.

Step 8 – Wrap-Up and Reflection (5 mins)

Conclude the session by reflecting on what was learned. Ask participants to share one takeaway or something new they discovered about a colleague. Remind everyone that the user manuals are living documents that can evolve as the team grows.

APPLYING THE TOOL

Team Member 'User Manual' Canvas

TIPS

- Before starting, think about **how manuals will be used**. Creating and sharing them is just the start. To make them truly useful, team members should be able to revisit them as needed—for example, to remember communication preferences when communication seems off. Think about **how to store** them somewhere **accessible and visible**.
- **Encourage clarity and conciseness**. Aim for a few clear points in each section. Overloading with details or incomplete thoughts can make the manual hard to use. Focus on the **essentials** that help others understand your needs and working preferences—keep it easy to read.
- **Foster openness**. Create an environment where team members feel comfortable sharing their **true needs and preferences**. Reassure them that their input is valued and respected.
- **Respect privacy and confidentiality**. Participation is voluntary, and everyone chooses what and how much to share. Make it clear that the information should remain within the group.
- **Facilitate with sensitivity**. Be mindful of participants' backgrounds and experiences. One person's self-perception may differ from how others see them—create space for both to be respected.
- **Ikigai lens**. "Ikigai" is a Japanese term that refers to passions that give value and joy to life. Invite participants to reflect on opportunities to connect different areas of the template—for example, how to connect what gives them purpose with their skills and role in the organization.
- **Individual reflection**. As an alternative to the team workshop, have team members complete the template as an individual exercise, to be compiled and used by HR or managers.

"A surprisingly useful tool that opened up conversations about team dynamics, expectations, and communication preferences. It helped improve internal collaboration."

"The tool is simple, yet highly impactful."

FIND MORE ADDITIONAL RESOURCES
on the Active-Peer-to-Peer-Academy of CRAFT



WORK ENVIRONMENT ASSESSMENT

remote | on-location | hybrid settings



Purpose



Sustainability



Collaboration



Wellbeing



Diversity, Equity &
Inclusion



Risk
Assessment



Ethics &
Transparency

NAVIGATING THE TOOL

WORK ENVIRONMENT ASSESSMENT

The Work Environment Assessment tool aims to **create a bridge between the strategic structures set up by management to facilitate smooth operations and the experiences and feedback of the team**. This tool can provide crucial ideas and optimizations for onboarding, aligning and managing teams in a **remote, hybrid or on-location setups**. The tool builds upon existing resources by providing a comprehensive visual representation and incorporating more relevant categories to current workflows.

ABOUT

PURPOSE

The main benefit of applying the Work Environment Assessment is **organizational team alignment**. What truly makes it stand out are the **additions addressing work-life balance**, and **inclusivity across team members** (incl. people with disabilities), and **flexibility between remote/ hybrid/ on-location work**.

Depending on your organization's purpose and values, you can establish and manage the feeling of work culture, belonging and support, as well as meeting expectations and targets.

FOR WHOM

The assessment tool is suitable for both **small and large scale teams** (select the most relevant categories and expand as needed over time). The tool consists of a **visual part for management and strategy and a more practical section for team members and employees to provide feedback**. This can be applied to **for-profit and nonprofit organizations**, as well as non-conventional teams or multi-party collaborations.

WHEN TO USE

The assessment can be applied: when **establishing a new team, initiative or organization**; when **optimizing processes and communication**; when **aligning on collaboration workflows and documentation**; when **monitoring team performance and satisfaction** or when applying for **impact certification**; when onboarding new team members or handling handovers; etc. By continuously improving based on employee feedback, your teams will adapt and thrive in remote, hybrid and on-location setups.

WHAT IS INCLUDED IN THE TOOL?

- A visual diagram canvas for management and team alignment (available in various formats)
- An example of a team feedback survey (feel free to adjust, expand to your liking and needs)

View and download your preferred format in the [public folder here](#).

Find all CRAFT tools as well as links to other useful resources and a directory of community members in our [Active-Peer-to-Peer-Academy](#).

CREDITS

Based on Original Canvas Design by Abbiss:

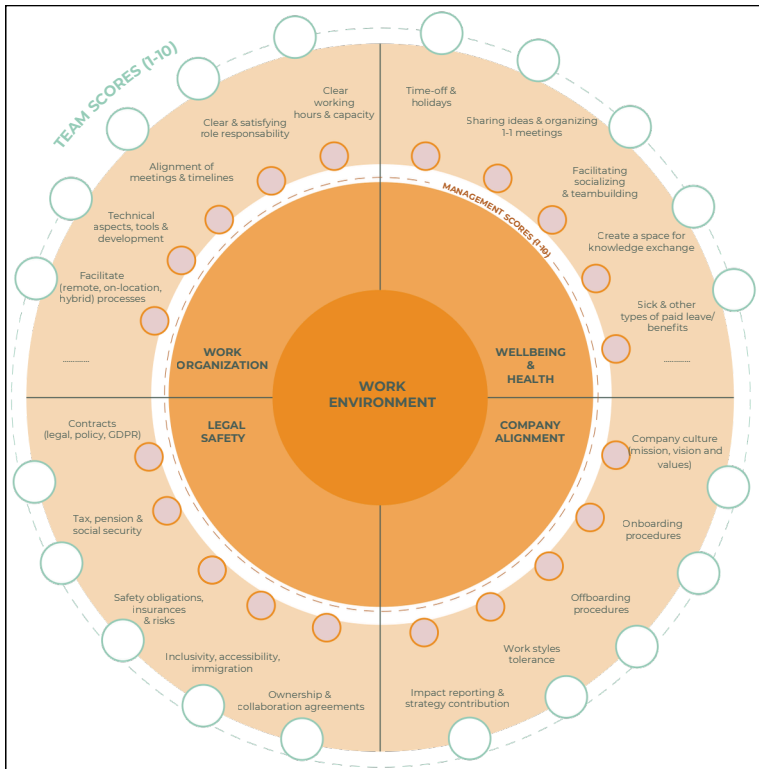
Source: <https://abbisscadres.com/knowledge/insights/international-remote-working/>

WORK ENVIRONMENT ASSESSMENT

management aligning strategy with teams' feedback

ASSESSMENT: REMOTE / ON - LOCATION / HYBRID

DATE:



BOTTOM UP SUGGESTIONS

What ideas for improvement or requests does the team have?
How can they communicate it to the management?

TOP DOWN SUGGESTIONS

What would the management like to introduce or change?
How to communicate it to the team?

WORK ENVIRONMENT TEAM SURVEY

(optional example)

MONTH: _____

Rate on a scale of 1 (poor) - 10 (excellent)

WORK ORGANIZATION

WORKING HOURS & CAPACITY

How did you experience the working hours and capacity division over the last month?



JOB RESPONSIBILITY & SATISFACTION

How clear and satisfied/aligned are you with your current role and responsibilities?



MEETINGS & TIMELINES

Do you feel that meetings are well communicated, structured and aligned with the timeline of expected results?



TECH & DEVELOPMENT

How well are you supported in adopting/improving tools or skills and development practices (research, reflection, etc.)?



PROCESS & ENGAGEMENT (remotely, on-location, hybrid)

Do you feel you receive adequate and up-to-date process support and communication from your team and manager?



IMPROVEMENTS

If you could change one thing about your work organization experience from last month, what would it be?

[Open-ended question]

LEGAL SAFETY

LEGAL & CONTRACTS

How clear and accessible are your contracts and legal rights (policies, GDPR)?



TAX & SOCIAL SECURITY

How well are tax and social security matters handled or communicated?



SAFETY, INSURANCES & RISKS

How confident are you that your safety and risks are adequately addressed?



INCLUSIVITY & ACCESSIBILITY

How inclusive and accessible do you find the work environment (e.g. immigration support, physical/mental accommodations)?



OWNERSHIP & AGREEMENTS (remotely, on-location, hybrid)

How satisfied are you with how ownership, intellectual property and agreement processes are handled?



IMPROVEMENTS

If you could change one thing about your organization's legal approach from last month, what would it be?

[Open-ended question]

WELLBEING & HEALTH

TIME OFF & HOLIDAYS

How satisfied are you with the balance between work and possibilities for time off (including holidays) over the last month?



IDEAS & 1-on-1 RELATIONS

How supported do you feel in initiating ideas and organizing/being heard in 1-on-1 relations?



SOCIALIZING & TEAMBUILDING

How satisfying/effective do you find social activities and teambuilding efforts?



SPACE & KNOWLEDGE

How well is knowledge exchange and creative space supported within the team or organization?



LEAVE & BENEFITS (remotely, on-location, hybrid)

How accessible and fair are policies for sick leave and other types of paid leave/benefits?



IMPROVEMENTS

Do you have any suggestions or requests related to work-life balance, wellbeing and benefits?

[Open-ended question]

COMPANY ALIGNMENT

COMPANY CULTURE & VALUES

How clearly are the company's mission, vision, and values communicated and related to what you did over the last month?



ONBOARDING

How effective and welcoming was your onboarding experience/ or any recent introductions (process, team, project, etc.)?



OFFBOARDING

How well are offboarding/reorganizing/reflection processes (process, team, project, etc.) handled within the organization?



WORK STYLES TOLERANCE

How much do you feel your preferred work style is acknowledged, respected and catered to over the last month?



IMPACT & STRATEGY (remotely, on-location, hybrid)

How transparent and reflective of your work contribution do you find the company's impact reporting and strategy?



IMPROVEMENTS

Do you have any suggestions or requests related to alignment, strategy and impact?

UNDERSTANDING THE TOOL

WORK ENVIRONMENT ASSESSMENT

HOW TO USE IT?

PRACTICALITIES & PREPARATION

Review the tool and **identify the most relevant categories** to address at the current stage of your organization. If you are establishing a **new structure for collaboration**, start directly with the first iteration on the visual diagram.

If you already **have existing teams and processes in motion**, you can choose if you prefer to begin with a bottom-up or top-down approach to improvements and optimizations. In any case they should be based on either research or data insights.

It is best to **involve other team members and stakeholders** when deciding on the work environment structure. That can be done as an open conversation, as a facilitated workshop or within a living document.

Depending on your team size, plan accordingly to collect feedback from all team members, employees or contributors (volunteers, consultants, etc.). You can use primary research methods for collecting the insights.

Bottom up approach	Top down approach
<p>STEP 1 Create a preliminary survey (using questionnaires, suggestion boxes, anonymous forms, team meetings, or workshops, etc.) to gather first insights from your team. At this stage it often helps to allow them to vote and share feedback anonymously. Use the provided example survey questions if you like.</p> <p>STEP 2 Prepare to communicate the feedback practice to your team and implement it as a routine based on your preferred frequency (every month, 6-12 months)</p> <p>STEP 3 After collecting 2-3 sets of insights, cluster them in categories and organize a management meeting to review the feedback. Preferably invite an employee representative if possible.</p> <p>STEP 4 In the meeting, use the visual diagram to address all insights, scores and the potential follow up. Address all other relevant categories from the Work Environment Assessment. Share your results and additional questions with the rest.</p>	<p>STEP 1 Proactively bring the management members to brainstorm ideas on how to improve the work environment. Use the visual diagram to discuss all categories and decide on the most relevant first steps that you can take. Preferably, outline a few options that the rest of the team can vote on afterwards.</p> <p>STEP 2 Communicate your initiative and reasoning behind the newly proposed ideas. Create an open space for questions and feedback or share the scale questions plus the options to vote on across the team.</p> <p>STEP 3 Collect and analyse the insights from the team. Outline a timeline to implement all work environment improvements. Include a feedback loop practice going forward.</p> <p>STEP 4 Clearly communicate all changes and new practices to the team. Allow for a trial period and collect additional insights if necessary. It is normal for big changes to receive an initial pushback. Remain open for questions, alternative ideas and support so everyone can adjust.</p>

APPLYING THE TOOL

WORK ENVIRONMENT ASSESSMENT

TIPS

- Every work environment needs a certain set of rules, code of conduct and clarity on processes and chain of communication in specific scenarios. However, it doesn't need to feel too strict. If you **create the boundaries and rules together with your team members, they can become 'rituals' and foster a healthy work culture.**
- Thinking upfront about **supporting your team in different situations is the biggest difference you can make in order to minimize employee turnover.** Remember that it is not only about the challenging scenarios (sickness, child-temporary leave, handovers, offboarding, etc.). You also have to proactively bring positive moments and team building opportunities. The most suitable activity depends on the people in your team.
- Keep in mind that **you might not be able to address every category and topic** if you have remote, on-location and hybrid teams. Consider having separate conversations with each team type and then bring everyone up to speed.
- Establish a **collaborative space for processing regular insights and feedback** so that both team and management know where to find and how to use the latest agreements and ideas for implementation.
- Surveys are not the only suitable primary research method for gathering feedback internally. Explore more methods on the APPA.

"This was a timely and useful resource as we had to adapt to hybrid work. The suggestions on communication and team rituals helped us improve cohesion even when not physically present. We're still experimenting with the best setup, but this gave us a strong foundation."

FIND MORE ADDITIONAL RESOURCES
on the Active-Peer-to-Peer-Academy of CRAFT



Miro for TEAMWORK GUIDE BOARD



Purpose



Collaboration



Wellbeing



Diversity, Equity &
Inclusion



Risk
Assessment



Systems
Thinking



Ethics &
Transparency

NAVIGATING THE TOOL

Miro for TEAMWORK GUIDE BOARD

This TeamWork guide provides **clear and practical steps for leveraging an online whiteboard platform - Miro***, and its features to **enhance team processes and collaboration**, as well as **stakeholder engagement**. It effectively highlights the importance of real-time collaboration, shared workspaces and the use of templates to streamline workflows based on expert facilitators' best practices.

ABOUT

PURPOSE

Social innovators can benefit from being introduced to current technical solutions and services to optimize workflows. The main aim of the guide is to **promote: the interest in tools, the use of existing templates and the advantages of shared workspaces**. It enables **alignment on mission and organizational propositions, transparency and inclusivity, process optimization and easy of collaboration and communication**, as well as supporting **wellbeing and sustainability in work relations**. Most importantly this approach to work saves time. This tool utilizes Miro's online collaboration environment and its free template library, Miroverse.

FOR WHOM

This guide and the online whiteboard collaboration tools (like Miro) are useful **to anyone with a visual memory**. You can create a **big overview while still being able to zoom into smaller details and easily edit items**. Collaborative spaces are particularly necessary for working remotely, but they can also be very practical when facilitating in a hybrid or on-location setting. The CRAFT guide board can be used from large teams to small teams, one-time or recurring stakeholder engagement or even just for personal projects. This tool is valuable for HR professionals, SCRUM masters, project managers, directors, community managers, interns, assistants, researchers, designers, etc.

**Miro is one option for an online collaborative workspace - if you are new to it, CRAFT's guide board will minimize your learning curve. (Consider what is the most suitable shared space for your team amongst alternatives like: Google Workspace, Microsoft Whiteboard, Figma, Canva, Mural, etc. Be mindful that they won't provide the same extensive library of existing tools and methods to select from and directly incorporate onto your board like Miro).*

WHEN TO USE

When establishing **new internal processes, optimizing team communication and collaboration, as well as facilitating interactions with external parties** (investors, research users, partners, suppliers, etc.), the curated templates and facilitation insights help you to get started and utilize best practices from experienced facilitators. Miro has the potential to assist you in visualizing ideas, mapping out plans, and keeping track of projects in a structured way. Most often it is used during meetings, project management, brainstorming, persona journeys, team building, hiring, onboarding & offboarding, research, etc.

WHAT IS INCLUDED IN THE TOOL?

- A Miro board containing a **'Miro guide'**, including videos, tips and recommended methods that can be copied and implemented in internal processes OR seen as inspiration for new tools and methods exploration and selection for internal/external use
- An exercise to get familiar with Miro and the [Miroverse](#)

View the board on Miro here and the tool in the [public folder here](#).

Find all CRAFT tools as well as links to other useful resources and a directory of community members in our [Active-Peer-to-Peer-Academy](#).

CREDITS

Utilizing existing resources and materials with the accredited sources available on the Miro board format. Credits to all original sources and authors. CRAFT doesn't claim any responsibility for external tools and information, nor for any Miro copyrights.

START HERE



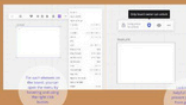
FACILITATION TIPS



Watch this video with your team to get familiar with the Miro interface.



Watch this video to learn how to use Miro as a facilitator.



Use the 'Miro Meeting' template to create a meeting agenda and track progress.

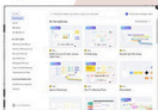
Watch this video to learn how to use Miro as a facilitator.



Use the 'Miro Meeting' template to create a meeting agenda and track progress.

TEMPLATES LIBRARY within Miro

Choose from 300+ Miro templates. Get inspired and customize anything you want based on your specific needs. You can also create your own templates and save them or share them within your organization's space.



RECOMMENDED TEMPLATES

DISC: Personality Test Template | Miroverse

Discover how Marina Algasinger does DISC: Personality Test in Miro with Miroverse, the Miro Community Templates Gallery. View Marina Algasinger's Miro templates.

What is MIROVERSE?

Miroverse is a Community Templates Gallery showcasing the very best boards of the Miro community, as well as their creators. Here are some tips on how to explore, discover, and share in Miroverse - <https://www.miro.com/miroverse/>

Miroverse is external to but compatible with any miro boards.

introduction TEAM MEETINGS

Use for:

- Defining new positions
- Hiring activities
- Onboarding & Offboarding flows
- Aligning & Managing timelines with workload distribution
- Operational monitoring
- Creative Ideation & discussions
- Team dynamics & Team building

introduction STRATEGICAL

Use for:

- Alignment & Project mapping
- Onboarding & Offboarding
- Reflections & Evaluations
- Decision making & Voting
- Explorative conversations
- Icebreakers & Getting to know each other
- Resource sharing
- Co-creation



UNDERSTANDING THE TOOL

Miro for TEAMWORK GUIDE BOARD

HOW TO USE IT?

PRACTICALITIES & PREPARATION

STEP 1

Go over the Miro board information, videos, templates and examples. By **reviewing the materials** of the guide you can get ideas and practical experience to improve meetings, events or activities hosted and initiated by you.

STEP 2

Share relevant parts with team, colleagues or partners. Some activities or materials might be valuable to your HR department, or business development and sales, or research & design colleagues. Keep an open mind for new possibilities to improve alongside each other.

STEP 3

Copy the information and templates you like the most into your own team space and expand on them over time. Depending on your preferred ways of working you can set up a company (free) Miro account, or migrate key resources into a document within your preferred working environment. Within Miro you can create boards with embedded template(s) or you can create a library with your own organization's tools and branding.

STEP 4

Incorporate it into internal processes and notify whoever it affects. Share your new skill with team members who also might benefit from using and facilitating on a collaborative board. Think about how certain methods and techniques can enhance internal processes or external stakeholder journeys. Make sure that your whole team is informed and aligned with the new additions. Provide training to bring everyone up to the same level, or create space for questions and further ideas to develop.

STEP 5 (optional)

Practice individually or with peers and discuss learnings. Consider scheduling a monthly or quarterly team development activity or meeting. You can do this all together or split up and work in pairs as self-development buddies.

STEP 6 (optional)

Nominate one person to stay on top of new Miro tool updates and new template releases (or within an alternative platform/collaborative space of your choice). Like any tool and software, there are plenty of updates and new features (you can also opt for joining the Miro community activities and channels). There are also possibilities to become a Miroverse creator if you would like to share a favourite template with the rest of the world. For many social innovators, Miro can be a valuable platform for knowledge exchange and for gaining exposure.

An example Miroverse team method, endorsed by the CRAFT community, is the **DISC personality model**, which supports teams and individuals in understanding their behavioral styles. By leveraging this model, teams can improve communication, strengthen collaboration, and enhance overall team dynamics, leading to a more effective and harmonious work environment.

APPLYING THE TOOL

Miro for TEAMWORK GUIDE BOARD

TIPS

- **Create a (free) Miro account and explore the online collaborative space.** You can opt to create a team space and invite more collaborators. Make sure that everyone is connected.
- Decide **how and for what purposes you would like to utilize Miro** with your team, organization or stakeholders. Always communicate it up front when you are inviting new people to a board. It can be helpful to include a short briefing for users who are unfamiliar with the tool.
- **Prepare your boards before each activity.** You can save boards as 'your own template' and reuse them within the organization.
- Utilize **functionalities like voting, sketching, timer, 'follow me'**, etc. to create a fun, pleasant and productive experience.
- **Keep your boards clean and organized.**
- Try out the **presentation mode by mapping out frames.**
- **Creating frames** can also be handy when exporting PDFs or other formats from parts of your board.

"Using tools has made my daily tasks and decision-making easier."

"This was really helpful and now our team is using Miro a lot. It's super useful."

"It helped me better structure brainstorming sessions, improve real-time team engagement, and streamline project management. The practical tips on organizing boards, facilitating discussions, and integrating tools made it easier to enhance productivity and teamwork."

FIND MORE ADDITIONAL RESOURCES
on the Active-Peer-to-Peer-Academy of CRAFT



SYSTEM PROBLEM TREE CANVAS



Purpose



Collaboration



Wellbeing



Risk
Assessment



Systems
Thinking



Ethics &
Transparency

NAVIGATING THE TOOL

SYSTEM PROBLEM TREE

The Problem Tree is a visual tool used to **identify, analyze, and break down the root causes and effects of a core problem** in a structured, tree-like format. The CRAFT version interlaces it with the Iceberg Model in order to inspire a more **overarching view of the expected and unforeseen influences around a problem.**

ABOUT

PURPOSE

The Problem Tree is an analytical and visual tool for methodically **examining the causes (roots) and consequences (branches) of challenges** that an organisation aims to address in alignment with its mission. It supports decision-making by making it easier to prioritize actions with real impact. The **optional stakeholder mapping feature** is useful for engaging the most relevant parties, while the Iceberg Model integration brings valuable depth by **uncovering hidden patterns.**

FOR WHOM

This tool is especially suitable for **social innovators and multi-stakeholder initiatives seeking to address systemic challenges.** It supports inclusive dialogue and participatory analysis, making it ideal for support organizations, mentors and educators, social and impact-driven entrepreneurs, NGOs and nonprofits, funders and impact investors, development agencies, community managers, systems thinkers, policymakers, designers, consultants.

WHEN TO USE

The Problem tree is often used in project management, development planning, or when analyzing social and organizational issues. It can also enable the definition of a solution that an organization wants to develop to address a societal problem. This tool is most effective during the **design and planning stages**, but it can also be used whenever there is a need to identify or deconstruct the root causes and effects around an issue. This can happen at both the early and later stages of an organization's development, including growth strategies too.

The Problem tree **encourages thinking, idea generation and interconnections.** This can be specifically valuable for uncovering assumptions (which might be false), identifying non-considered risks or positive/negative effects down the line of a certain decision. This is why, with the right facilitation it can be a conversation starter for teams or with partners in any field. It is commonly applied in workshops, co-creation sessions, or strategic planning meetings.

WHAT IS INCLUDED IN THE TOOL?

- A visual System Problem Tree Canvas (available in various file formats)
- A set of guiding questions for each field.

View and download your preferred format in the [public folder here](#).

Find all CRAFT tools as well as links to other useful resources and a directory of community members in our [Active-Peer-to-Peer-Academy](#).

CREDITS

The Problem Tree method is widely used in project planning and participatory development practices. It is part of the Logical Framework Approach (LFA).

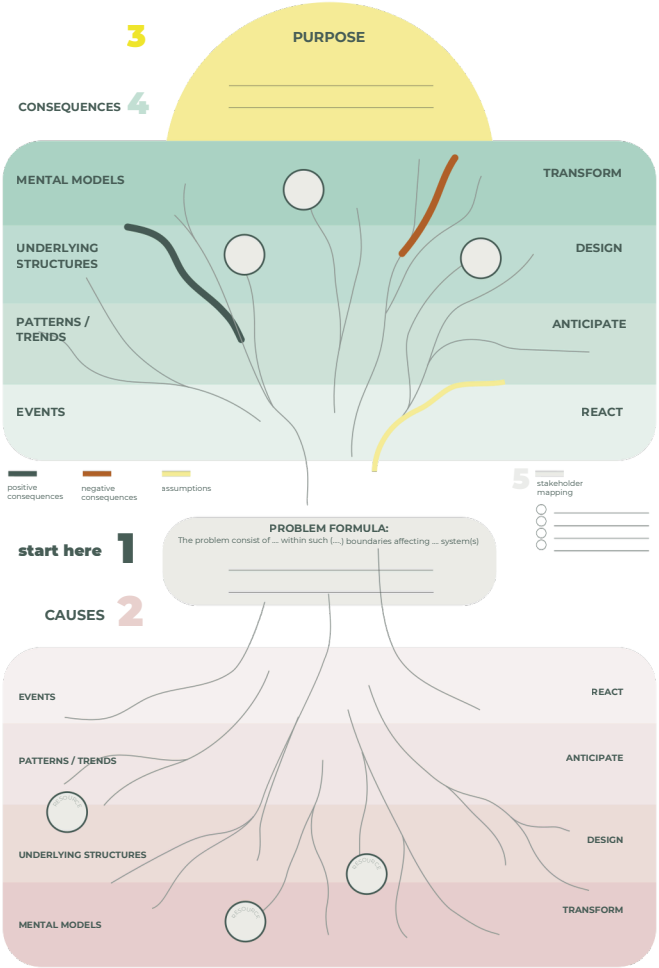
Based on Original Canvas, Source: <https://storiesforimpact.com/toolbox/problem-tree/>

Iceberg Model source: (The original Iceberg Model was developed by anthropologist Edward Hall in 1976 but applied to culture in organisations. It was then adapted and evolved by systems and management theorists.)

Visual from: <https://ecochallenge.org/media/images/Iceberg-Model-width-800.png>

SYSTEM PROBLEM TREE CANVAS

with Iceberg model



What specific challenge are we facing? Who or what is most affected? What are the boundaries of this problem (sector, geography, timeframe)? How does this problem manifest in our system?

Can we use the formula:

'The problem consist of ... within such (...) boundaries affecting ... system[s]'.

CAUSES

2

Ask repeatedly: "Why does this happen?" (go deeper with each layer)

EVENTS	<p>What specific incidents have contributed to this problem? What recent situations made the problem more visible or urgent? How do parts of the system or key stakeholders react to these events?</p>	REACT
PATTERNS / TRENDS	<p>What recurring behaviors or long-term trends can we observe? How often does this happen? Is there a cycle or rhythm? Are we able to anticipate some trends or aspects of the problem?</p>	ANTICIPATE
UNDERLYING STRUCTURES	<p>What systems, processes, or policies contribute to this? Are there incentives or barriers built into the system? How do rules, norms, and routines sustain the problem? What structures need a re-design?</p>	DESIGN
MENTAL MODELS	<p>What beliefs, values, or assumptions are underlying these structures? What mindsets prevent change or reinforce the current state? How do societal or organizational narratives influence this? Is there a proven way to transform these mental models in a positive way?</p>	TRANSFORM

PURPOSE

3

What is our organizational mission in relation to this problem?
 What long-term change are we trying to nurture?
 How do we define success in solving this problem?
 Can we formulate a mission or purpose statement to guide our decision making and Systems Thinking?

STAKEHOLDERS

5

Mapping on top of roots and branches (optional).
 Use icons, initials, or color codes to annotate connections.
 Who is affected by this problem (positively or negatively)?
 Who contributes to the causes or experiences the effects?
 Who has the power or interest to influence change?
 Which roots and branches are connected to specific stakeholders?

CONSEQUENCES

4

Ask: "What happens because of this problem?" (go upward in chain reactions and separate branches)

EVENTS	<p>What specific incidents have contributed to this problem? What recent situations made the problem more visible or urgent? How do parts of the system or key stakeholders react to these events?</p>	REACT
PATTERNS / TRENDS	<p>What repeated or growing effects can be seen over time? Is this affecting different groups or systems in a consistent way? Are there patterns or trends that we can anticipate and reinforce/mitigate?</p>	ANTICIPATE
UNDERLYING STRUCTURES	<p>How are systems adapting to or reinforcing the consequences? Are new routines or structures forming because of this? Do we need to design a new structure to prepare for the growth of a new branch?</p>	DESIGN
MENTAL MODELS	<p>What beliefs or assumptions are forming as a result of the problem and the series of consequences? How is this reshaping mindsets or public narratives? Is there a proven way to positively transform a mental model through consequences?</p>	TRANSFORM

UNDERSTANDING THE TOOL

SYSTEM PROBLEM TREE

HOW TO USE IT?

PRACTICALITIES & PREPARATION

- The 'Tree trunk' represents the central **problem**.
- The 'Roots' represent the **root** causes of the problem.
- The 'Branches' represent the **effects** or consequences of the problem. You can opt to **distinguish positive from negative consequences** when drawing new branches in order to more easily prioritize what to strengthen. If you are unsure of a certain branch, you can also mark it as an assumption. (see colour coding on canvas)

STEP 1

Identify the core problem you want to work on. Write it in the center of a large printed canvas sheet or, optimally, on an interactive board. You can decide if you want to follow the problem formula suggested: *"The problem consists of ... within such ... boundaries affecting ... system(s)."*

The problem is usually best formulated as a statement, not a question.

STEP 2

Identify the causes. Ask **"Why does this problem exist?"** and list the underlying causes below the core problem (these form the roots).

Keep on adding roots until you have a good understanding of how you reached the current state of the problem. It could be helpful in this step to document any sources you used or researched so you can come back to them if necessary.

Link them or mention them in the root circles (resources).

You can stick to this core part of the System Problem Tree tool or opt to **add the depth dimensions** by thinking of more sub-roots per Iceberg level of influence: **React to events, Anticipate patterns, Design underlying structures, Transform mental models.**

STEP 3

Place on top in the yellow circle your **'purpose statement'**. Answer **'What does your organization have as a mission, related to this problem?'**

This will serve as the nurturing 'sun'- giving direction to your branches. This encourages forward-looking thinking and it assists you to stay on track.

STEP 4

Identify the effects. Ask **"What happens because of this problem?"** and place the consequences above the core problem (these are the branches).

While you draw them as branches, characterize them as positive/negative/assumption which might not be clear yet.

Again you can opt to add the **depth dimensions** by thinking of more sub-branches per Iceberg level of influence: **React to events, Anticipate patterns, Design underlying structures, Transform mental models.**

STEP 5 (optional)

If it is crucial to your problem, you can opt to add a **layer of stakeholder mapping**. Identify an icon or colour for your key stakeholder groups and mark which roots and which branches relate to each group. This can assist you in tailoring your approach to the specific audience.

STEP 6 (optional)

Organize logically by arranging causes and effects in hierarchical levels to show deeper roots and broader impacts. Review and refine as needed over time.

Revise as new insights emerge. Follow up on assumptions or information that need validation or further inquiry.

APPLYING THE TOOL

SYSTEM PROBLEM TREE

TIPS

- Prioritise creating a **good "Problem" formulation** to begin with. If necessary, when discovering root causes and insights, adjust or rephrase the problem statement before going further.
- You can follow the recommended **flow of steps** OR opt to already fill in the 'Purpose' on top earlier in the process. That way you can use it as guidance when formulating both roots and branches. Feel free to work in the order that suits you best.
- Provide more time for **deep analysis and reflection**. Seeing and understanding deeper problems takes time and a shift of perspective. Good ideas don't always come immediately. Use the rule of brainstorming and discarding your first 10 ideas. Or actively take 'creative space' away from the problem and then come back with a fresh look on things.
- Host your canvas in an **interactive workspace** to have enough space to write problems, ideas, solutions.
- Offer **more practice sessions** to build confidence in using the tool, use **sticky notes or cards** for flexibility when organizing ideas.
- Involve **diverse stakeholders** to get a fuller picture of the problem and facilitate **open dialogue**, encouraging "why" and "so what" questions.
- Take a photo or digitize the Tree for **documentation and further analysis**.
- Follow up with a **solution tree**, which flips the negative elements into positive objectives.
- **Interactive elements** like drag-and-drop, color coding, or an auto-generated map could make it more intuitive.
- Clarify **stakeholder involvement** – A more structured way to categorize and engage different groups would be helpful.

"A simple but powerful tool. It helped us break down the root causes of the issue we're trying to solve and stay focused on solving the right problems."

"This was one of the most useful tools. It helped our team clearly define root causes and visualize how specific challenges interconnect. We used it internally to align our support strategies and communication with stakeholders. Very effective for planning and team discussions."



ECOSYSTEM THEORY OF CHANGE CANVAS



Purpose



Sustainability



Collaboration



Wellbeing



Diversity, Equity &
Inclusion



Risk
Assessment



Systems
Thinking



Ethics &
Transparency

NAVIGATING THE TOOL

ECOSYSTEM THEORY OF CHANGE

Theory of Change (ToC) is a **strategic planning and evaluation method** that maps the pathway from a social challenge to long-term impact by defining a **clear sequence of change**, grounded in evidence and stakeholder insight. This version highlights the involvement of the entire ecosystem and tracks impact outputs both to expected and to unforeseen beneficiaries.

ABOUT

PURPOSE

The purpose of Theory of Change is to **make explicit how and why an initiative will create meaningful social change**. It makes explicit assumptions and pathways of evidence through which change is expected to happen. The new additions of **identifying the problem and mapping out intended and reached beneficiaries** complements the overview of necessary resources, activities, and expected outcomes, to provide a shared framework for design, implementation, learning, communication, management and accountability. It helps to align strategy with values, tangible actions and clear monitoring of results, ensuring the interventions meet real needs of the beneficiaries.

FOR WHOM

This tool is well-suited for **social entrepreneurs, nonprofits, funders, foundations, mission-driven enterprises, public agencies, collaborative partnerships and innovation teams** who aim to tackle complex societal issues with a clear strategy and accountability. It promotes **transparency, shared vision, and adaptive learning** - essential in social innovation contexts. A must have tool for any project manager or impact expert.

WHEN TO USE

It is particularly useful when dealing with **multi-layered problems that require systemic change**.

Use the Theory of Change:

- during the inception, planning or reorientation of an initiative (program, product, service, etc.)
- when defining strategy
- during development to design coherent interventions.
- as part of monitoring and evaluation planning, to define what success looks like and how to measure it
- when planning impact measurement
- when facilitating stakeholder or team alignment
- when scaling or replicating an innovation, to understand what conditions are needed to succeed elsewhere
- when seeking funding or support to strengthen grant proposals, pitching and communication.

Getting familiar with the method requires a bit of extra time and introduction, but is proven to be very rewarding and well-received for long-term use.

WHAT IS INCLUDED IN THE TOOL?

- A visual canvas (available in various file formats)

View and download your preferred format in the [public folder here](#).

Find all CRAFT tools as well as links to other useful resources and a directory of community members in our [Active-Peer-to-Peer-Academy](#).

CREDITS

The Theory of Change (ToC) approach was popularized by Carol Weiss in the 1990s and has since been adopted and adapted by numerous organizations including the Aspen Institute, UNDP, and OECD for strategic planning, monitoring, and evaluation. This version of the Theory of Change method draws on foundational work by ActKnowledge and the Aspen Institute, as well as adaptations inspired by logic model frameworks (e.g., W.K. Kellogg Foundation) and practices in social innovation and impact evaluation.

Visual Canvas based on: [page 47-49](#)

ECOSYSTEM THEORY OF CHANGE

PROBLEM

What challenge(s) does your initiative solve?
Are there any assumptions or risks to navigate within the ecosystem you operate in?

OUTCOMES IMPACT

What short-, mid-, long-term outcomes do you strive for and how would they bring positive change and sustainable impact in the ecosystem?
Are there any assumptions or risks to navigate?

STAKEHOLDERS

Map out stakeholders: What are (assumed) relevant, involved, or affected groups?

INPUTS

Identify inputs: What resources are needed (funding, people, materials, partnerships)?

ACTIVITIES

Plan Activities: What actions will address the problem and involve key stakeholders?

INDICATORS

Set Indicators: How will you measure progress? Do you have hard and soft KPIs?

OUTPUTS

Outline Outputs: What short-, mid-, long-term results do you expect per activity? Indicate how they relate or contribute to the desired outcomes and impact on top. Are there also outputs that bring negative impact or deviate from your approach? How can you mitigate that in the future?

BENEFICIARIES

Identify Beneficiaries: Who actually benefits and how (matching assumptions, plus unforeseen groups)? Indicate how they relate or contribute to the desired outcomes and impact on top.

Fill in per line of 'Activity' and be aware of assumptions in your content or potential risks. (Optional) Appoint a person or team to be responsible for leading it and documenting 'Indicators' and 'Outputs'.

UNDERSTANDING THE TOOL

ECOSYSTEM THEORY OF CHANGE

HOW TO USE IT?

PRACTICALITIES & PREPARATION

Get familiar with the tool and canvas. Consider what is the best format to use with your team and stakeholders, for building your Theory of Change. Share a briefing upfront and provide a space where everyone can collaborate on your chosen format. It is best to schedule a meeting to go over the method and build the structure that matches your initiative. Once you have briefed everyone and it is clear how to use the framework, you can divide tasks to provide further details per box and appoint a person responsible to track certain outcomes.

Follow the steps below. (Optional: alternatively, if you have very defined impact goals - you can trace backwards from that to identify what needs to be done and who needs to be engaged to drive tangible and measurable results.).

STEP 1

'Problem' - Clearly and briefly define **the social challenge or systemic issue** your initiative seeks to address.

STEP 2

'Stakeholders' - At the beginning it could be useful to identify which **stakeholder groups within your ecosystem are involved**, experience the problem or can benefit from potential changes.

STEP 3

'Inputs' - List the **resources, capacities, and partnerships** required to support your initiative. Separate or cluster as needed to best represent the structure of your organization or team. Outline key assumptions/ facts and potential risks.

STEP 4

'Activities' - Outline the key **actions or interventions** that will be implemented using those inputs. Design and develop the activities in alignment with your goals. Create a separate line for each activity. Outline key assumptions.

STEP 5

'Indicators' - Define **measurable signs of progress** that track whether activities are working as intended. Establish metrics for the tracking progress. Note how often they can be updated. Outline key assumptions.

STEP 6

'Outputs' - Identify the **direct, tangible results**, products or services delivered after each activity. Outline key assumptions.

STEP 7

'Beneficiaries' - Clarify further the specific **'beneficiaries' per activity**. Consider if there are any beneficiary groups that you might not have initially thought of as part of your stakeholder groups. Evaluate if you reached your desired audiences.

STEP 8

'Outcomes/ Impact' - Describe the **short, medium, and long term changes** that result from your activities, culminating in the broader impact, summarized on top.

STEP 9

Implement & Monitor - Execute the activities, adjust as needed and document the outputs in your shared Ecosystem ToC. Assign a person or team responsible for each part of the tool. Mark them with colourful dots (optional).

STEP 10

Evaluate & Learn - Decide on a frequency to review impact, update strategies, and share insights. Note how accurate your assumptions are and make sure to set realistic goals.

APPLYING THE TOOL

ECOSYSTEM THEORY OF CHANGE

TIPS

- **Visualize in a format best suited** for your field/ team or place it in a spreadsheet. Preferably use a tool (Miro, Excel, Notion, etc.) that is familiar to your team's workflow so it can be used for documentation.
- Opt to **co-create your Ecosystem Theory of change** with **stakeholders** or potential **beneficiaries** to incorporate diverse perspectives.
- Be **explicit about assumptions and external factors** that may influence outcomes—these are often situations where gaps in logic or evidence exist.
- Mark which of your indicators are **'hard KPIs'** (must-reach) or **'soft'** (optional).
- Link your **measurable outputs** to further sources. Use diagrams to make the logic visually accessible and enable communication or analysis.
- Treat it as a **living document**. Test and revise your Ecosystem ToC regularly as context and learning evolve.
- **Integrate with (existing) Monitoring & Evaluation frameworks** for stronger and adaptive management.
- Ensure **activities are aligned with your overall mission for impact**.
- **Watch a 2.5 min [Intro video](#)** produced by the Social Investment Business and the Good Analyst.
- Explore an **[alternative canvas format by DIY Toolkit](#)**
- You may want to first complete a [System Problem Tree](#) and a [Business Value Model canvas](#) to inform your Ecosystem Theory of Change design. After defining a clear view of stakeholders and value proposition, it is easier to work on the detailed project planning or monitoring and evaluation.

"This framework helps clarify the step-by-step process of achieving our mission by breaking it down into inputs, activities, outputs, outcomes, and impact.

One of the most important takeaways is that the Theory of Change forces us to think backward from the impact we want to achieve. Instead of just planning activities, we must ensure that every action contributes to long-term environmental responsibility and education. This approach makes our strategy more intentional and measurable. Additionally, the tool helps us identify gaps in our plan."

FIND MORE ADDITIONAL RESOURCES
on the Active-Peer-to-Peer-Academy of CRAFT



IMPACT SCAN

A STARTER MAP FOR SROI



Purpose



Sustainability



Collaboration



Diversity, Equity &
Inclusion



Critical Evaluation
& Pivoting



Risk
Assessment



System
Thinking



Ethics &
Transparency

NAVIGATING THE TOOL

IMPACT SCAN: A STARTER MAP FOR SROI

Social Return on Investment (SROI) provides a framework to **quantify the value of an organization's social, environmental, and economic impact in monetary terms**. Many organizations want to measure their impact using SROI but may not be ready for full implementation. This Impact Scan offers a **gradual, practical entry point** to help you get started and build capacity over time.

ABOUT

PURPOSE

The Impact Scan **introduces the foundations of SROI** and helps organizations take first steps toward applying its principles in practice. It supports you to **build a simplified version of an SROI Value Map** (a core tool in full SROI analysis), to **begin collecting evidence informed by stakeholder input**, and to **develop competence and lay the groundwork for a more complete analysis over time**.

FOR WHOM

This guide is for organizations that are **new to SROI and want to start applying its principles** in a manageable and meaningful way, even if they haven't had the opportunity to work with a trained SROI practitioner.

WHEN TO USE

Use this guide when you're ready to test your [Ecosystem Theory of Change](#) and begin gathering stakeholder-informed evidence of impact.

WHAT IS INCLUDED IN THE TOOL?

- [Impact Scan template](#) spreadsheet (available in various file formats)
- Step-by-step instructions in this guide

View and download your preferred format in the [public folder here](#).

Find all CRAFT tools as well as links to other useful resources and a directory of community members in our [Active-Peer-to-Peer-Academy](#).

CREDITS

The Impact Scan: A Starter Map for SROI and guidance were developed based on: Indicative Scan of Social Impact by [Wendy Braeken](#), Maakt Beter. Copyright by the author.
[Starting Out on Social Return on Investment](#) by Social Value UK.
[The Guide to SROI](#) by Social Value International.
[The Principles of Social Value](#) by Social Value International.

UNDERSTANDING THE TOOL

IMPACT SCAN: A STARTER MAP FOR SROI

HOW TO USE IT?

STEP 1: Identify your stakeholder groups (columns A-C)

Who do you affect—positively or negatively, directly or indirectly? **List the different stakeholder** groups and estimate how many people you reach in each group. To start, you may want to focus on your primary stakeholders: those who interact directly with your organization and are intended to benefit from your solution.

STEP 2: Identify their likely alternatives (column D)

What would your stakeholders do if they didn't have access to your solution? Write down what you think.

STEP 3: Describe the outcomes stakeholders experience (columns E-G)

What **changes** do your stakeholders experience as a result of your solution? Refer to your [Ecosystem Theory of Change](#) (if you have one), and include any negative changes. On a scale of 1-10, rate how important you think the outcomes experienced by each group are to that group. Optionally, list indicators that help show how significant they are.

STEP 4: Describe the inputs stakeholders contribute (columns H-J)

What do stakeholders need to contribute to benefit from your solution (e.g.: time, money)? On a scale of 1-10, rate how important you think the inputs contributed by each group are to that group. Optionally, list any indicators that help show how significant the inputs are.

STEP 5: Talk with your stakeholders and update your analysis

Now test your thinking by engaging with some stakeholders. Choose who to speak with and a format that feels comfortable— interviews, focus groups, or surveys. Ask the same questions you answered above. Be open: their views may differ from yours. See the next page for more tips.

STEP 6: Update your Impact Scan and calculate scores (columns K-L)

Incorporate what you learned from stakeholder conversations into your Scan. Then, calculate your importance ratios and value-added scores as shown in the template. These scores are not exact impact measures. Rather, they help you compare the relative value created for different stakeholder groups:

- Importance ratio: Estimates how significant the benefits are for each stakeholder group compared to what they contribute— regardless of the group's size.
- Value-add score: Estimates the total value, taking into account the group's size.

STEP 6: Reflect and apply insights

Review your findings. What stood out? What surprised you? What strengths can you build on? Are there any opportunities to improve or redirect resources for greater impact? What actions can you take to increase the positives or reduce any negatives moving forward?

STEP 7: Update your Impact Scan to track progress

Revisit your Impact Scan periodically to monitor progress and deepen your assessment. Over time, you may include more stakeholder groups. When you're ready for a full SROI, explore the resources on the Tips page.

APPLYING THE TOOL

IMPACT SCAN: A STARTER MAP FOR SROI

TIPS

- You can learn a lot from a few **key stakeholders**. The first time, focus on one or two key stakeholder groups—especially your direct beneficiaries. Even five interviews can be valuable, if you speak with people who represent a range of experiences (e.g.: different ages, genders, or backgrounds)
- **Choose a format that supports relationship building**. You can gather insights through interviews, focus groups, surveys, or another format that suits your context. Think about what's feasible for you and what will offer a positive, respectful experience for participants.
- **Be transparent and respect confidentiality**. Begin by explaining why you are collecting input, how the data will be used, and that participation is voluntary. Reassure participants that their personal data will remain confidential and that their input matters.
- **Use plain language**. Your stakeholders won't know terms like output or outcome. Instead, use questions like "What change have you experienced, or do you hope to see, as a result of [solution]?"
- **Be prepared to encounter different views**. Expect different perspectives and embrace them. Ask follow-up questions like "Why do you say that?" to uncover deeper insights. You may hear things you hadn't considered. Remember: stakeholder input is one valuable lens among others. You can combine it with other data to make informed decisions.

"This tool helped us better understand how to evaluate our impact. We haven't implemented SROI fully yet, but we're starting to track outcomes more intentionally."

"It helped me start thinking in terms of real change, not just financial results."

FIND MORE ADDITIONAL RESOURCES
on the Active-Peer-to-Peer-Academy of CRAFT



PURPOSE COST BREAKDOWN MODEL CANVAS



Purpose



Sustainability



Collaboration



Critical
Evaluation &
Pivoting



Risk
Assessment



Ethics &
Transparency

NAVIGATING THE TOOL

PURPOSE COST BREAKDOWN MODEL

The Cost Breakdown Tool is a systematic method for **listing and categorizing all the expenses** involved in running a business, organization, or initiative. This model explores **beyond only monetary** costs and exchanges.

ABOUT

PURPOSE

The purpose of the Cost Breakdown is to provide **clarity on the financial resources required, enabling better budgeting, pricing, fundraising, and resource allocation**. To make financial planning both rigorous and approachable, it assists social innovators to easily identify, categorize, and manage their costs. If used in combination with the [Purpose revenue model](#), it can provide a month-by-month view of the initiative's **financial health**.

The visual model divides costs into **five categories: Personnel, Implementation Costs, Administrative Costs, Development & Growth, and One-Time Costs**; while the sheet provides an example structure for monitoring and use over time.

FOR WHOM

The tool is designed for **early-stage entrepreneurs, social enterprises, project teams** but it can also be used and adapted for other types of organizations who need to manage their financials more effectively and make informed decisions about their cost structure.

WHEN TO USE

The tool is most beneficial at the **planning stage**, when you are laying out operations and resources. If used regularly it can monitor cash flow and facilitate financial planning months ahead, including foreseeing risks and opportunities. It's essential when preparing for fundraising, grant applications or seeking loans, as well as adjusting strategy. This detailed view ensures that the organization has a complete understanding of the financial situation, helping you stay on track and making informed decisions.

Use the Cost Breakdown model in parallel with the [Purpose revenue Model](#) to ensure financial sustainability and support your [Business Value Model Canvas](#).

WHAT IS INCLUDED IN THE TOOL?

- A Purpose Cost Breakdown Model diagram canvas (available in various file formats)

View and download your preferred format in the [public folder here](#).

Find all CRAFT tools as well as links to other useful resources and a directory of community members in our [Active-Peer-to-Peer-Academy](#).

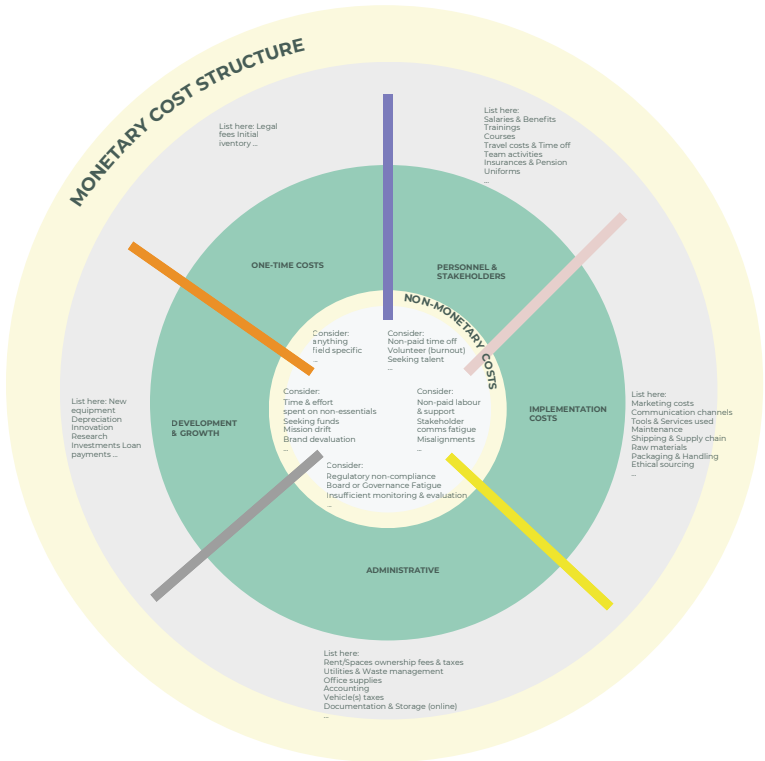
CREDITS

Visual inspired by Original Revenue Model:

Source: <https://getlucidity.com/strategy-resources/revenue-model-framework-guide/>

Cost analysis is a foundational aspect of business and project management, with widespread use in tools like Project Budgeting, Lean Business Planning, and Financial Forecasting, commonly taught by institutions such as Harvard Business School and MIT D-Lab.

PURPOSE COST BREAKDOWN MODEL



UNDERSTANDING THE TOOL

PURPOSE COST BREAKDOWN MODEL

HOW TO USE IT?

PRACTICALITIES & PREPARATION

Firstly, collect any currently available information around your financials. In case of starting a new initiative, consider doing preliminary marketing research to help you better estimate costs realistically. To use the Purpose Cost Breakdown model diagram, it is best to gather all relevant stakeholders, preferably bringing different views from your processes, and discuss and map out all costs.

You can opt to follow this up by updating your current financial system to reflect all types of costs and their frequencies. Keep in mind that it is good to regularly revisit your costs and revenues, at least on a monthly basis.

STEP 1

Fill in the diagram with your team to identify most applicable categories.

You can choose between starting only with the outer monetary circle first, before proceeding to ideate and identify non-monetary costs as well. Or keep on adding to all sections of the diagram depending on what comes to mind.

- **Personnel Costs** - These include all expenses related to staffing and employee management, such as: Salaries, Training and development, Travel
- **Implementation Costs** - These costs are tied to the operational side of the business and the delivery of services or products, such as: Marketing, Website maintenance, Raw materials, Shipping costs
- **Administrative Costs** - These are general operating expenses required to keep the business running, including: Rent, Utilities, Office supplies, Accounting services
- **Development & Growth Costs** - These are costs associated with expanding or improving the business, such as: Equipment purchase, Investments, Loan payments
- **One-Time Costs** - These expenses occur on a one-off basis and include: Legal fees, Initial inventory

STEP 2

After you have listed all costs of your project or venture, categorize these costs as **fixed** (e.g., rent, salaries) or **variable** (e.g., materials, transport).

STEP 3 (optional)

Once your team has mapped key cost categories visually, **transfer the information to a shared workspace for detailed monthly planning** and long-term tracking.

Create your own preferred spreadsheet structure to monitor revenues and costs over time. Creating realistic projections can greatly increase the financial health, resilience and sustainability of your initiative. Monitor your expenses over time and plan for any potential cash flow challenges.

For products, it can be handy to have an estimation of the available quantities and unit costs for each item. For services, this can be done in relation to an hourly rate or another metric.

Consider having a total cost calculation for each category and overall. It is always smart to include contingency costs or reserves for unexpected expenses. If relevant, you could include a way to reflect irregular funding patterns as well.

Review and refine regularly based on real expenses or changes in scope.

APPLYING THE TOOL

PURPOSE COST BREAKDOWN MODEL

TIPS

- If you are in the very early stages of development, **consider having 2 copies of the diagram** in order to outline what is the **current cost structure NOW** and in the **second copy of the diagram - how your costs develop and change at a specific date in time**. This will help you foresee and manage challenges and changes down the line to creating your optimal cost model.
- When looking at costs, it can be helpful to **mark which ones are flexible and which ones are fixed** (for what duration period). Pay attention to costs that also have depreciation or interest.
- Some entrepreneurs and financial professionals like to **leave a little buffer** when projecting costs. You can do so by rounding up your costs a bit. Or put aside a monthly amount into a 'parking lot' account and use that money in case of fluctuations, emergencies, etc.
- **Use spreadsheets or budgeting tools** to maintain accuracy over time. When working with financial projections it is best to consider an expected minimal (worst case), expected maximum (best case) scenario and a most realistic middle scenario. Update regularly—a static budget can quickly become obsolete.
- **Involve team members or advisors to catch hidden costs.**
- **Don't underestimate operational costs** like overhead or staff time. Remember that this should also account for any insurances and local taxes or support.
- Link to your [Revenue model](#) to assess sustainability or funding gaps.

"Very useful in visualizing all company costs and realizing where we were underestimating expenses. It gave us more control over financial planning. Also opened eyes to costs that we didn't consider before."

*"Gave us a clearer picture of "where the money goes".
"It helped improve budget transparency and think critically about cost optimization."*



PURPOSE REVENUE MODEL CANVAS



Purpose



Sustainability



Collaboration



Critical
Evaluation &
Pivoting



Risk
Assessment



Systems
Thinking



Ethics &
Transparency

NAVIGATING THE TOOL

PURPOSE REVENUE MODEL

A Revenue Model outlines how an organization generates revenue through the delivery of its offerings. This model explores **more than just monetary revenue streams**. It outlines **revenue streams, pricing and exchange strategies, sales and other key processes**.

ABOUT

PURPOSE

The purpose of the Revenue Model is to **clarify the streams of monetary and non-monetary revenue that sustain an initiative**, enabling financial planning, value alignment, and long-term viability. This template helps organizations to create a **comprehensive overview of where the cash and the support** is, in order to develop, evaluate, and optimize processes and strategic decision-making. The new added angles to the tool nudge to align revenue models with organizational purpose and impact goals, as well as considering the sustainability and ethics of the streams.

FOR WHOM

The Revenue model is ideal for **social entrepreneurs, mission-driven startups, and non-profit innovators or organizations looking to create sustainable impact** while maintaining financial health. It supports hybrid models that combine mission and margin.

WHEN TO USE

Use the tool during **any stage of development**. It is especially valuable in the early planning phases, or later on when diversifying your model or connecting with new partners, when seeking funding or other support, or when transitioning from a grant-dependent model to a more sustainable income-generating approach.

Use the [Purpose cost Breakdown model](#) in parallel with the Revenue Model to ensure financial sustainability and support your Business Value Model Canvas.

WHAT IS INCLUDED IN THE TOOL?

- A Purpose Revenue Model diagram canvas (available in various file formats)

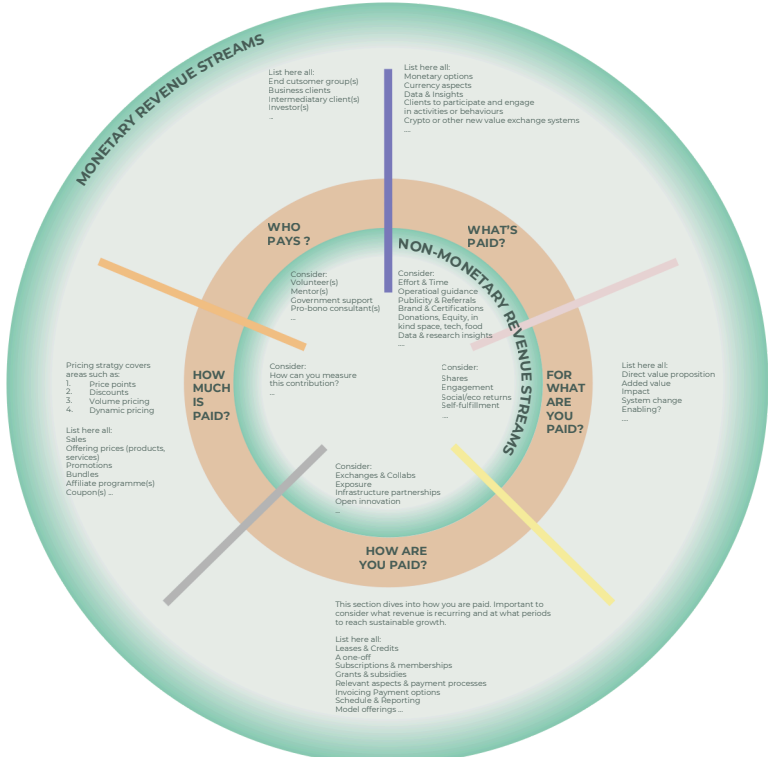
View and download your preferred format in the [public folder here](#). Find all CRAFT tools as well as links to other useful resources and a directory of community members in our [Active-Peer-to-Peer-Academy](#).

CREDITS

The concept of a revenue model is rooted in business strategy and has been formalized through tools like the Business Model Canvas by Alexander Osterwalder and the Lean Startup methodology by Eric Ries.

The visual is inspired by Original Revenue Model diagram Source: <https://getlucidity.com/strategy-resources/revenue-model-framework-guide/>

PURPOSE REVENUE MODEL



UNDERSTANDING THE TOOL

PURPOSE REVENUE MODEL

HOW TO USE IT?

PRACTICALITIES & PREPARATION

Firstly, collect any currently available **information around your financials**. In the case of starting a new initiative, consider doing preliminary marketing research to help you better estimate potential revenue streams processes. To use the Revenue model canvas diagram, it is best to gather all relevant stakeholders, preferably bringing different views from your process, and discuss and map out all monetary revenue and non-monetary support you receive. You can follow this up by updating your current financial system to reflect all types of revenues and their frequencies. Keep in mind that it is good to regularly revisit your costs and revenues, at least on a monthly basis.

STEP 1

Fill in the diagram with your team to identify most applicable categories.

List **all potential revenue streams** (product sales, subscriptions, licensing, service fees, donations, etc.)

You can choose between starting only with the outer **monetary circle first**, before proceeding to ideate and **identify non-monetary revenues** as well. Or keep on adding to all sections of the diagram depending on what comes to mind.

- Who pays? (end consumers, clients, external party supporting a user, volunteer, advisor, fans, etc.)
- What is paid? (incl. money, data/insights, behaviour influence, referrals, time, effort, etc.)
- What is paid for? (product type, service, bundle, other offering, status, sustainability, activism/ message, etc.)
- How are you paid? (payment options and their accessibility, in full/ installments, in kind/ exchange with, etc.)
- How much is paid? (incl. price point, discounts, volume/ dynamic pricing, alternative offering, exchanges)

STEP 2

With your team you have to **identify what is working well** and **what is not bringing the expected results** and why. Discuss and (re-)define pricing strategies or offering messages tailored to specific target segments.

STEP 3

Estimate revenue per stream based on realistic market assumptions. Keep in mind that some revenue streams, whether monetary or non-monetary can be a one-time transaction or a recurring exchange.

Depending on how you maintain them and what kind of follow ups you create between streams you can amplify your reach.

STEP 4

Iterate these model discussions and **validate based on market feedback or pilots**. Generate new ideas when in need of diversifying your model or tackling new partners and competitors. When necessary, test different scenarios to assess risk and opportunity.

STEP 5 (optional)

Once your team has mapped key revenue streams visually, **transfer the information to a shared workspace for detailed monthly planning and long-term tracking**. Create your own preferred spreadsheet structure to monitor revenues and costs over time. Creating realistic projections can greatly increase the financial health, resilience and sustainability of your initiative. The example template encourages a systemic view that goes beyond mere financial aspects, integrating sustainability, impact, and well-being aspects.

APPLYING THE TOOL

PURPOSE REVENUE MODEL

TIPS

- **Revenues are not only for businesses**, nonprofit or other organizations also deal with a cash flow of resources. Consider using the visual diagram to expand on your existing streams or diversify with new ideas covering monetary and non-monetary support.
- Financial monitoring and projections can be overwhelming. **Start simple**, then expand with complexity over time.
- If you are in the very early stages of development, **consider having 2 copies of the diagram**, in order to outline what is the current feasible revenue model NOW and in the second copy of the diagram - a desired FUTURE revenue structure at a specific date in time. This will help you see and manage opportunities and partnerships needed to get to the next step.
- Consider **blended or hybrid revenue models** (e.g., mix of earned income and grants). If possible, be transparent with funders or partners about how revenue will be reinvested or scaled.
- **Use spreadsheets or budgeting tools** to maintain accuracy over time. When working with financial projections it is best to consider an expected minimal (worst case), expected maximum (best case) scenario and a most realistic middle scenario. Update regularly—a static budget can quickly become obsolete.
- For more accurate marketing strategies and financial projections, **test assumptions with real users, clients or customers**.
- **Align your revenue streams and ways of obtaining them with your mission and values** — ensure your revenue model supports, not undermines, your social goals.

*"This was one of the most eye-opening tools for us. As a tech startup, we tend to focus on scalability and pricing—but this tool encouraged us to look at who pays, why they pay, and how value is exchanged. It pushed us to reconsider how we monetize and how that aligns with user experience and impact goals."
"This tool helped us think beyond standard contracts and price lists. We used it to explore alternative sources of income, like maintenance services, consulting, or even knowledge-sharing partnerships."*

FIND MORE ADDITIONAL RESOURCES
on the Active-Peer-to-Peer-Academy of CRAFT



IMPACT INVESTMENT READINESS self-assessment



Purpose



Sustainability



Collaboration



Wellbeing



Diversity, Equity &
Inclusion



Critical
Evaluation &
Pivoting



Risk
Assessment



Systems
Thinking



Ethics &
Transparency

NAVIGATING THE TOOL

IMPACT INVESTMENT READINESS SELF-ASSESSMENT

This tool brings together established **frameworks regarding startup stages of development, technological readiness, and investment readiness with a new lens on impact maturity** to provide a holistic view of the expectations that impact investors may have for impact enterprises.

ABOUT

PURPOSE

The tool provides an overview of the **startup development stages, the type of funding typically available** at each stage, and **what investors may look for** in general in terms of the well-established **Technological Readiness Levels (TRLs) and Investment Readiness Levels (IRLs) together with a new lens on Impact Maturity**. It doesn't prescribe a single path, but shows how expectations typically grow in complexity and depth.

This tool helps founders prepare for what impact investors may expect when they invest. It shows how these expectations change as your startup or project grows, across technology, business, and impact areas. Use it to organize your thinking, plan your next steps, and communicate clearly with investors—without losing sight of your impact goals.

Note: This tool doesn't tell you which investors are the right match for your needs. Figuring that out takes other tools and conversations.

FOR WHOM

This tool is designed for **founders developing innovative, scalable impact solutions** who are considering raising funds from impact investors—whether through debt, equity, or other forms of financing. Other types of organizations that are exploring investment options can also benefit.

WHEN TO USE

Use this tool **early in your startup or project development**—from idea stage through growth. It's especially valuable when you're starting to think about fundraising, as preparing well takes time.

WHAT IS THE TOOL?

- An Impact Investment Readiness self-assessment spreadsheet (available in various file formats)

View and download your preferred format in the [public folder here](#).

Find all CRAFT tools as well as links to other useful resources and a directory of community members in our [Active-Peer-to-Peer-Academy](#).

CREDITS

Technological Readiness Levels: Developed by [NASA](#) and used widely in the EU

Investment Readiness Levels: Developed by [Steve Blank](#) and linked to the Business Model Canvas

Impact Maturity: Adapted for this tool based on the [Impact Model](#), the [Societal Readiness Levels](#), and the [Impact Readiness Levels](#).

IMPACT INVESTMENT READINESS

self-assessment for impact startup founders seeking to raise investment
 editable [spreadsheet](#) available

Startup Development Phases	Typical Funding available for startups seeking venture capital	Technological Readiness Levels assess the maturity of your technology	Investment Readiness Levels assess the maturity of your business model	Impact Maturity assess the maturity of your impact model
		Source: Developed by NASA . TRLs are used in many EU funding calls	Source: Developed by Steve Blank linked to the Business Model Canvas	Source: adapted for this tool based on the Impact Model , Societal Readiness Levels , and Impact Readiness Levels
Idea phase You define your concept and validate that it addresses a real problem with an attractive potential market.	Personal credit Friends & family Business angel Pre-seed	TRL 1 - Basic principles observed	Level 1 - Complete first-pass business model canvas	Opportunity to address a societal or environmental problem formulated
		TRL 2 - Technology concept formulated	Level 2 - Market size / competitive analysis	Problem, target stakeholder groups, and societal readiness for the solution analyzed
		TRL 3 - Experimental proof of concept	Level 3 - Problem / solution validation	Ideation and testing of potential options for the proposed solution with relevant stakeholders validates relevance and helps articulate the most promising impact pathway (e.g. Theory of Change) with clear goals, indicators, and data collection methods
Startup phase You go from concept to an MVP, and test and refine your MVP focusing on reaching product-market fit through customer validation and iteration.	Pre-seed Seed	TRL 4 - Technology validated in a lab	Level 4 - Prototype low-fidelity minimum viable product	Prototype testing substantiates analysis of problem, target group, and societal readiness and informs further solution refinement
		TRL 5 - Technology validated in a relevant environment	Level 5 - Validate product / market fit	Solution and outcome(s) for concrete target group are validated, supported by relevant indicators, data collection methods, and stakeholder involvement, and baselines or benchmarks are established
Growth phase PMF achieved, now it is about developing a scalable product and operations while acquiring customer and revenue growth.	Series A, B, C	TRL 6 - Technology demonstrated in a relevant environment	Level 6 - Validate revenue model (right side of canvas)	Solution is market-ready, and impact is substantiated with comparison against baselines or benchmarks together with stakeholder involvement
		TRL 7 - System prototype demonstration in an operational environment	Level 7 - Prototype high-fidelity minimum viable product	Solution and delivery are refined taking into account impacts across the value chain, including negative and unexpected effects
Scaling phase You pursue a suitable scaling strategy, expanding into new markets or segments, and scale operations.	Series C, D Acquisition or IPO	TRL 8 - System complete and qualified	Level 8 - Validate value delivery (left side of canvas)	How one's impact intersects with that of other market participants to shape stakeholder outcomes is considered, and cooperation is pursued to advance systems change. Additional impact goals are defined with relevant indicators and data collection methods for ongoing impact monitoring
		TRL 9 - Actual system proven in an operational environment	Level 9 - Identify and validate metrics that matter	Impact is scalable and actively managed according to best practice, including mitigation of negative effects. Level of impact evidence increases via use of high-quality studies, external data sources, and/or external verification

[Link to spreadsheet](#)

<https://docs.google.com/spreadsheets/d/1N-E2rq0U9saX-fUMXqOE5HALnfbj2w5zJpvX1NuE7mc/edit?gid=313770158#gid=313770158>



UNDERSTANDING THE TOOL

IMPACT INVESTMENT READINESS SELF-ASSESSMENT

HOW TO USE IT?

Use this tool regularly to **guide and track progress developing your impact business model over time**, and to spur strategic conversation with your team and (potential) investors about important milestones.

PRACTICALITIES & PREPARATION

Gather key team members or a trusted confidante in a relaxed space where you can focus.

STEP 1

Assess and indicate your current level

Read through each column and discuss where you stand in terms of startup development stage, technological readiness, investment readiness, and impact maturity. Which levels have you fully achieved? Which levels are you working on? Use the drop-down menus in each cell to indicate where you are. You may be further ahead on some dimensions than on others.

STEP 2

Identify your proof points

Be explicit about why you think you have achieved a given level in each dimension. What evidence do you have? What evidence may still be needed? Put yourself in the shoes of an investor and think critically about what evidence an investor would want to see.

STEP 3

Define your priorities and next steps

Based on where you are, discuss what your next moves should be. Which dimensions should you prioritize? What steps can you take to reach the next level? What will you need to take those steps?

STEP 4

Use what you learned as you engage investors

Investors will look to your past progress and current plans to assess your likelihood of success in the future. Share with them the progress you've made so far and engage them in a strategic conversation about getting to the next level – both their expectations and what you'll need to deliver.

APPLYING THE TOOL

IMPACT INVESTMENT READINESS SELF-ASSESSMENT

TIPS

- **Use as a guide, not as a recipe:** the alignment between startup development stages and technology, business, and impact readiness is approximate. Focus on navigating progress and aligning on expectations that make sense for your project.
- **Progress may be uneven:** it's normal to advance faster in some areas and slower in others. Just be intentional – reflect on gaps and decide where to focus next, ensuring you make progress in all areas over time.
- **Confirm technological readiness** for your use case: Even if you're using existing technology, you need to validate its readiness in your specific context — assumptions from other environments may not hold.
- **Be honest and conservative:** if you're unsure whether you've fully achieved a level, assume you haven't. Explore what's needed to get there with confidence.
- **Dig deeper:** for further guidance on using the TRLs, IRLs, or Impact Maturity criteria, check out the following sources:
 - [TRL Assessment Tool by Horizon Europe](#)
 - [Investment Readiness Levels canvas by Design a Better Business](#)
 - [IMM-PACT Guide by The Bertelsmann Foundation, PHINEO, the Federal Impact Investing Initiative and SEND](#): a roadmap for impact measurement and management.
 - [Impact Readiness Levels by Impact Shakers](#): designed to help impact ventures embed impact at their core while maintaining the agility needed for business success.

"The Impact Investment Readiness tool has been helpful in assessing our organizational strengths and identifying gaps that need to be addressed as we prepare to seek funding."

FIND MORE ADDITIONAL RESOURCES
on the Active-Peer-to-Peer-Academy of CRAFT



Closing remarks

maturity of tools and
acknowledgments

Tool Readiness Assessment (TRL 6-9)

Technology Readiness Levels (TRLs) provide a clear, standardized framework to assess the maturity of a tool or innovation—from early development to full deployment. This scale is especially valuable because it allows funders, implementers, and policymakers to understand how ready a solution is for real-world use, helping them make informed decisions about adoption, investment, or scaling. By using TRLs, innovators can demonstrate credible progress, reduce uncertainty, and show that a tool is not just promising in theory, but proven in practice.

The current toolbox reached TRL 8-9 and below is described the process from TRL6 to TRL 8-9.

TRL 6 – Technology demonstrated in a relevant environment

- our 12 tools were created based on proven frameworks (e.g., BMC, TOC, SROI, etc.).
- Tools were **co-developed and iteratively improved** in the **Living Lab**, mimicking real-use contexts.
- Usability, usefulness, and barriers were assessed during piloting.
- **Conclusion:** ✓ TRL 6 reached through structured, relevant environment testing.

TRL 7 – System prototype demonstration in operational environment - first version of tools

- SIMs used the tools in their actual workflows with real SIAs (not simulated testing).
- Adjustments were made based on **user feedback collected during real-time use** (from final registration).
- Tools were **implemented in decentralized contexts** (Romania, Croatia, Latvia), showing operational flexibility.
- **Conclusion:** ✓ TRL 7 reached through live, operational piloting.

TRL 8 – Actual system completed and "qualified" - final version of the tools

- Final versions of the 12 tools have been **published** after adjustments from piloting.
- **No further fundamental changes** are required — usability, wording, and minor accessibility adjustments were final refinements.
- Tools are **rated highly useful (3.5–4.4/5)** by real users.
- 99% of SIMs **intend to continue using them**, indicating qualification for real-world use.
- **Conclusion:** ✓ TRL 8 reached with fully functional, validated tools.

TRL 9 – Proven in real operational use

- Tools are now being integrated into actual **SIMs and partners workflows**.
- Some SIMs have already **used tools internally** (e.g., for team alignment, business planning).
- Tools have been used in **multiple contexts and sectors**, not just during the pilot.
- Plans for **continued use and scaling** are documented and recommended.
- **Conclusion:** ✓ TRL 9 demonstrated through repeated, real-world application and scaling readiness - continued in Year 3 and beyond.

ACKNOWLEDGEMENTS

THANK YOU!

Dear reader,

Thank you for diving into tools and methodologies for social innovation. We value your time and effort and we hope to have brought you new ideas and approaches to achieving your impact goals.

Extending appreciation and sincere gratitude:

- to the **European Commission and its representatives**;
- to the **local Impact Hubs** for coordinating the participation of social innovation actors and multipliers in Romania, Croatia and Latvia;
- to all **social innovation actors and multipliers** engaging in the co-creation activities, research and review of the tools;
- to all **Active-Peer-to-Peer-Academy members** and **Policy Summits speakers and attendees**;
- to the **CRAFT project team members and contributors** making the creation of the CRAFT toolbox a reality.

FURTHER LEARNINGS & RECOMMENDATIONS FOR TOOL IMPROVEMENT/IMPLEMENTATION:

- From the research we have documented a substantial interest in the creation of **'explainer videos'** per tool to help facilitate the adoption and the use of the provided materials.
- **Collect real use case examples** of filled in tools. The aim of the project is yet to attempt to collect examples within the online Active-Peer-to-Peer-Academy. Feel free to share your example by creating a free account.
- Provide more **interactive versions of the improved tools**. Currently, most of the tools offer an editable slidedeck, excel or other document type. However, each tool has the potential for an even more engaging experience in an on-location, remote or hybrid setting.
- A concrete request emerging from the research in Romania, Croatia and Latvia is to have the tools and materials **translated into local languages**. This could be beneficial for other regions as well since lack of explanation in the local language/ lack of translated tool version has been identified as a key barrier.
- As much as we empathize with the creative use of paper and print-outs when working with a tool, we kindly ask you to consider before printing if there is a digital way to navigate your activity (Miro, Canvas, Google or Microsoft Suite, etc.)
- For the majority of the tools, the **community members appreciate having a facilitator**. If you are introducing the toolbox to your ecosystem, consider seeking the assistance of a consulting professional, a mentor with practical experience or reach out to CRAFT for an introduction with a toolkit expert. ([Milena Ninova](#), [Suzanne Jenkins](#), [Lucia Radu](#))
- Our desire would be to **improve further the accessibility of the toolbox** to better serve users with special cognitive or physical access needs, recognizing their valuable role in leading and contributing to social innovation initiatives.
- We encourage to **use the tools in combination with suitable tech solutions** to optimize their implementation and streamline (iterative) processes. Driving the digital transition across social innovation actors and multipliers can strengthen the competitiveness of the social economy.
- Next to the toolbox, learn about the **CRAFT policy recommendations** (available on our website in 2026).

Based on our insights we recommend to: research local/ecosystem needs before taking action; familiarize yourself with relevant regulations and support systems (EU Green Deal goals & timeline, ESG or other impact measurement requirements, legal impact regulations, impact investment criteria, prizes, opportunities, grants, ESF+ funds, etc.)

Craft partners



Impact Shakers



BABELLE
CREATE TOGETHER

toulouse
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Liepāja



Zagreb



Bucharest

Contributors



Discover the organizations contributing to this toolbox on the project website <https://craftaction.eu/meet-the-partners/> and **connect** with our Active-Peer-to-Peer-Academy Community <https://app.craftaction.eu/community/410>

- Share a filled-in tool as a use case example
- Suggest a new relevant tool for social innovator
- Connect with peers and partners