

Business Model Canvas

Map how a business creates, delivers and captures value, then test the assumptions.

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Business / owner: _____ Date: _____ Review date: _____

<div>08 / Key partnerships</div> <div>Which outside capabilities do you depend on?</div> <div></div> <div></div> <div></div> <div></div> <div></div> <div></div>	<div>07 / Key activities</div> <div>What must you repeatedly do well?</div> <div></div> <div></div> <div></div> <div>06 / Key resources</div> <div>Which people, assets and access are essential?</div> <div></div> <div></div> <div></div>	<div>02 / Value propositions</div> <div>What job, outcome and reason to choose you?</div> <div></div> <div></div> <div></div> <div></div> <div></div> <div></div>	<div>04 / Customer relationships</div> <div>How do you win, onboard and retain?</div> <div></div> <div></div> <div></div> <div>03 / Channels</div> <div>How do buyers discover, evaluate and buy?</div> <div></div> <div></div> <div></div>	<div>01 / Customer segments</div> <div>Who pays, who uses, who decides?</div> <div></div> <div></div> <div></div> <div></div> <div></div> <div></div>
<div>09 / Cost structure</div> <div>What costs follow from this model?</div> <div></div>			<div>05 / Revenue streams</div> <div>What is paid for, when and how often?</div> <div></div>	

Use one model per canvas. Mark each note E = evidence or H = hypothesis. Connect each revenue stream to a segment and value proposition. Number your riskiest assumptions before testing them.

Format credit: Alexander Osterwalder's *Business Model Generation*, co-authored with Yves Pigneur. This worksheet is an independent adaptation. Nine block guides follow; their examples form one hypothetical service business.

01 / Choose a buyer you can reach

I start with a specific buying situation. A broad industry label is not enough to guide an offer or a sales conversation. Keep the payer, day-to-day user and approver separate when they are different people.

Ask before you write

- Whose work is disrupted by the problem?
- What event makes solving it urgent?
- Who controls the budget and who can block access?
- Which prospects should you decline?

Evidence to collect

Use recent buyer conversations, won and lost deal notes, and examples of the current workaround. Record the source and date. Treat your own opinion as a hypothesis.

Avoid combining buyers with different jobs or purchase processes on the same canvas.

Segment worksheet

Buyer and context	Trigger / current workaround	Exclusion / evidence

Our primary segment, payer and user

HYPOTHETICAL EXAMPLE - CRM IMPLEMENTATION STUDIO

Owner-led B2B service firms with a small sales team and leads scattered across inboxes. The owner pays; sales staff use the CRM. A new salesperson or missed handoff may trigger interest. Firms seeking only a list of contacts are excluded. These are hypotheses, not client findings.

Validate the segment

Ask a prospect to walk through the last lead that stalled. Look for a repeated problem and an accessible decision-maker. Do not treat interest in a free call as proof of willingness to buy.

Next interview / owner / date

02 / Make the change concrete

Describe the customer's job and the obstacle before describing your service. A useful proposition explains the change the buyer wants and the tradeoff they accept. Do not turn an intended outcome into a guarantee.

Prompts for the offer

- What job is the customer trying to complete, in their words?
- What makes the current workaround costly, slow or unreliable?
- What will the buyer receive, and what stays outside the scope?
- What proof can you show without inventing results?

Write one proposition per priority segment

Customer job / friction	Your deliverable / change	Alternative / reason to choose

For [buyer] who [situation], we provide [deliverable] so they can [observable change]

HYPOTHETICAL EXAMPLE - SAME HYPOTHETICAL STUDIO

A fixed-scope CRM implementation replaces scattered lead handoffs with a named owner, next action and due date for every open opportunity. Deliverables include a pipeline, routing rules, tested follow-up and team training. It does not include paid media buying or a promise of extra revenue.

Test before expanding

Show the proposed deliverables to a buyer. Ask what they would remove, what would prevent adoption and what they would compare it with. A concrete paid pilot is stronger evidence than praise.

Most doubtful promise / evidence needed / next test

03 / Design the path to purchase

A channel is a route to the customer, not just a place to post. Map discovery, evaluation, purchase, delivery and support. A strong acquisition channel can still fail if the handoff into sales is unclear.

Decision prompts

- Where do buyers already look for help?
- Which source can introduce you credibly?
- What asset helps a buyer compare options?
- Who owns the next step after an inquiry?

Keep a channel only if

You can reach the segment, explain the offer, capture a response and trace it to a sales outcome. Give experiments a budget or time limit and a review date.

Separate a first-touch source from the channel used to close the sale.

Customer journey worksheet

Journey step	Channel / asset	Owner / handoff
Discovery		
Evaluation		
Purchase		
Delivery and support		

HYPOTHETICAL EXAMPLE - SAME HYPOTHETICAL STUDIO

Discovery through accountant and web agency referrals; evaluation through a short workflow audit and sample implementation plan; purchase through a scoped proposal; delivery through working sessions; support through a shared request queue. No channel performance is assumed.

First channel test / response to measure / review date

- ☐ A real person owns every incoming inquiry.
- ☐ The buyer can take the next step without guessing.

04 / Decide how customers are served

Define the human effort needed to win and keep the customer. A self-service promise and a high-touch delivery model create different costs. Put the relationship you can actually support on the canvas.

Work through the lifecycle

- Acquisition: what help does the buyer need to decide?
- Onboarding: what access, people and decisions must arrive first?
- Delivery: how are progress, blockers and changes handled?
- Retention: what recurring value justifies an ongoing relationship?
- Exit: how are data, access and ownership handed back?

Relationship design

Moment	Service promise / boundary	Owner / evidence of completion
First inquiry		
Onboarding		
Progress review		
Renewal or exit		

HYPOTHETICAL EXAMPLE - SAME HYPOTHETICAL STUDIO

The buyer gets one scoping call and a written delivery plan. Implementation includes a weekly working session and a shared issue list. An optional support agreement covers a defined monthly review and small fixes. New integrations require a separate scope. At exit, the client receives a configuration register and owns its accounts.

Response window / support channel / escalation owner

Watch the hidden workload

Record unplanned requests during a pilot. Repeated exceptions belong in the service design or price. Do not silently absorb them and call the model repeatable.

Relationship risk to test first

05 / Specify what people pay for

List each revenue stream separately. State the unit, payer, price basis, payment timing and cancellation or change terms. Revenue booked, cash collected and contribution are different views of the model.

Prompts that expose weak assumptions

- Is this a project, subscription, usage fee, commission or another unit?
- What event makes the payment due?
- What evidence supports the proposed price?
- How do discounts, refunds or late payment affect the model?

Revenue stream worksheet

Stream / paying segment	Unit / price basis	Payment event / evidence

HYPOTHETICAL EXAMPLE - SAME HYPOTHETICAL STUDIO - EXAMPLE USD AMOUNTS ONLY

A proposed implementation fee is USD 6,000 per scoped project. Example terms: 50% to reserve delivery and 50% after agreed acceptance checks. An optional support plan is USD 600 per month for defined work. These are planning assumptions, not market rates or reported sales.

Do a small reality check

Example arithmetic: a USD 6,000 fee minus USD 3,000 in direct delivery cost leaves USD 3,000 before fixed overhead and other expenses. Use actual delivery hours and collections from a pilot before relying on this contribution.

Price assumption / buyer evidence / next test

- ☐ The buyer understands exactly what is included.
- ☐ The collection event matches a clear delivery milestone.

06 / Identify what must be available

Key resources are the people, assets, systems, knowledge and access the model depends on. List what is essential to deliver the proposition, not everything the business owns.

Resource prompts

- Which skill cannot be missing on delivery day?
- Which access or data must the customer provide?
- Which reusable asset reduces repeated work?
- Who can cover a missing person or system?

Capacity rule

Estimate the delivery constraint in hours, slots or another real unit. Reserve time for selling, administration and rework. Do not plan every available hour as billable.

Essential resource register

Resource / capability	Owner / capacity	Dependency / fallback

HYPOTHETICAL EXAMPLE - SAME HYPOTHETICAL STUDIO - EXAMPLE CAPACITY ONLY

The model needs CRM configuration skill, a documented setup method, test records and customer-approved account access. Suppose the team has 120 delivery hours per month and estimates 60 hours per project. Two projects would consume all delivery capacity, so the first plan accepts one while testing the estimate and preserving a buffer.

Current bottleneck / unit of capacity / usable buffer

Check control and ownership

Identify which resources you own, rent or borrow. Account for access expiry and replacement. A customer's willingness to provide data is an assumption until confirmed.

Resource to secure before the next sale

07 / Name the repeatable work

Key activities are what the team must do consistently to create the result. Use verbs. Tie each activity to the value proposition, channel or relationship it supports, and define what finished looks like.

Prompts for delivery and learning

- What happens for every customer, in what order?
- Which steps require judgment rather than a template?
- What must be checked before the customer accepts the work?
- Which feedback changes the next delivery cycle?

Activity design worksheet

Activity / trigger	Owner / definition of done	Output / quality check

HYPOTHETICAL EXAMPLE - SAME HYPOTHETICAL STUDIO

Audit lead handling; agree stage definitions; configure routing and follow-up; test booking, replies and opt-outs; train the team; review adoption. A workflow is not done when it is saved. It is done when a test record follows the intended path and the owner can explain how exceptions are handled.

Choose a leading operating measure

Track a small number of measures that tell you whether the work is happening, such as overdue handoffs or unresolved launch defects. These support delivery decisions; they are not substitutes for customer outcomes.

Most critical activity / completion evidence / review owner

- ☐ Every essential activity has a person responsible.
- ☐ Rework and feedback have a place in the schedule.

08 / Make dependencies explicit

Key partnerships supply access, capability or reach you cannot efficiently provide alone. A partner belongs on the canvas because of a specific dependency or exchange, not because their logo looks credible.

Questions to answer together

- What does each side contribute and receive?
- Who owns the customer relationship and follow-up?
- What permission is needed before sharing contact details or data?
- What happens if quality, availability or incentives change?

Partner worksheet

Partner type / role	Exchange / boundaries	Dependency / backup

HYPOTHETICAL EXAMPLE - SAME HYPOTHETICAL STUDIO

A web agency may introduce customers with broken lead handoffs. The studio supplies CRM implementation and returns website work to the agency when appropriate. A specialist can handle scoped data migration. Technology providers supply infrastructure. Each is a different relationship with different ownership and continuity risks; none is an actual named partner.

Run a small collaboration first

Agree one shared activity, a named contact on both sides and a review date. Put referral terms, data boundaries and delivery responsibilities in writing before making commitments to a buyer.

First partner experiment / shared outcome / owner

- ☐ There is a fallback for a critical outside dependency.
- ☐ Customer data stays within the agreed permission boundary.

09 / Check whether the model holds

Separate fixed overhead from costs that grow with each sale. Include delivery labor, software, acquisition, support, rework and payment costs where relevant. Record the period and unit so the numbers can be compared.

Cost worksheet

Cost / driver	Fixed or variable / period	Amount / source

HYPOTHETICAL EXAMPLE - SAME HYPOTHETICAL STUDIO - EXAMPLE USD AMOUNTS ONLY

One project: 60 hours at USD 45 = USD 2,700 plus USD 300 in direct tools and delivery expense = USD 3,000 direct cost. Against the example USD 6,000 fee, contribution is USD 3,000 before fixed overhead. Check the hour estimate first; revenue alone cannot tell you whether delivery works.

Review the whole canvas

- ☐ Each priority segment has a matching proposition and payment stream.
- ☐ Channels and relationships have owners and affordable capacity.
- ☐ Resources, activities and partners can deliver the promised scope.
- ☐ Costs include labor and recurring obligations, using the same period.
- ☐ The riskiest assumptions are marked H and have dated tests.
- ☐ Someone owns the next revision; unsupported claims stay out.

Riskiest assumption / next test / owner / review date

Want help implementing this?

Bring your completed worksheets. I can help turn your next decision into a working growth system.

shoebloodhi.com/contact