



Horizon Results Booster

Info Session | 24th of May 2023

Portfolio Dissemination & Exploitation Strategy Module C
Business Plan Development

Prepared by Antonello Fiorucci

The **Key Exploitable Result (KER)** is the hero!

- Responding to specific **needs**, to the demand of a well-defined group of **“customers”**
- Selected by the partners for **use** and/or **market** introduction
 - ✓ A product or process
 - ✓ A new service
 - ✓ A new policy
 - ✓ New standard
 - ✓ New training courses
 - ✓ Input for a new project

I am **not**
just a
patent!



Service 1: Portfolio Dissemination & Exploitation Strategy

Module C

The Exploitation Strategy Seminar (ESS) is the core of the PDES-C

- The seminar lasts for **one day/two half days**
- For the KER owners, the Coordinator and the Exploitation Team, but **all Partners** are suggested to participate and contribute
- Best if organized **before the midterm** of a project life
- A unique opportunity to discuss **Exploitation Plan next steps** and have an **insight** on KERs
- Focus on a **maximum 3 KERs**
- The **Final Report** provides inputs for making the most out of the **exploitation activities** in the project's **work plan**:
 - ✓ Characterisation table, Priority map, Exploitation Roadmap, Recommendations

PDES-C Approach

- Focus **not** on the **scientific dimension** but on the KER's **key features** related to its **use** with a **problem oriented** (demand driven) approach
- Concentrate on how to **increase the TRL** after the project is **ended** having in mind possible **lack of resources**
- **Key ingredients:** Unique Value proposition - **UVP, Use model, Early adopters** (target audiences for dissemination)





Seminar Objectives

- **Introduce: impact, KERs, use and their relationship**
- **Focus on KERs and discuss:**
 - **Problems addressed - alternative solutions - unique value proposition - novel solution and use model**
 - **Risks related to the use of results (possibly) and**
 - **First actions after the project's end**

ESS Agenda

Day 1

Introducing Exploitation

- ✓ Definitions of Exploitation
- ✓ Key Exploitable Results
- ✓ Exploitation vs Dissemination
- ✓ Exploitation Plan
- ✓ Q&A

Day 2

Working session for KER1

- ✓ Characterisation Table
- ✓ Risk Map
- ✓ Exploitation Roadmap

Working session for KER2

- ✓ Characterisation Table
- ✓ Risk Map
- ✓ Exploitation Roadmap

Working session for KER3

- ✓ Discuss for KER3 the Characterisation Table
- ✓ Risk Map
- ✓ Exploitation Roadmap

Delivery Steps

Steps	Deadline
Expert official appointment	Day 0
Expert first contact with project	Day 1-3
Introductory call - Data and place of ESS scheduling	At least 5 weeks before ESS date
Customization of ESS agenda	4 weeks before ESS date
Data collection for ESS	3 weeks before ESS date
ESS preliminary report shared with project	At least 5 days before ESS date
ESS delivery and collection of feedback forms	Date agreed with project
ESS final report due	10 working days after ESS

Service 2: Business Plan Development (BPD)

BPD Overview

- Support to partners for **having a structured business/exploitation plan** (in the case the result will not be commercialized) for **1 (one) KER**
- Support is **customised** according to the **maturity** of the KER selected
 - ✓ If a draft business/exploitation plan is **available**, the Experts will help you **review** it, **prepare an implementation roadmap** and provide **recommendations** for its finalisation
 - ✓ If the KER is just characterised (**no draft available**), the Experts will support you in identifying the **information** to be collected and validated for drafting the plan, **discussing use/business model** and provide **recommendations** on how to prepare it

Main Elements

- Focus on **1 KER**
- Best if organized **after the midterm** of a project life – after a PDES C
- The service delivery lasts for **2 months**
- For the KER **owner/s**, the **Coordinator** and the **Exploitation Team**, but **all Partners** are suggested to participate and contribute
- The **Final Report** provides inputs for planning future use:
 - ✓ Characterisation table, Lean/Value Proposition Canvas, Exploitation Roadmap, Recommendations

Activities (1/3)

1 Introducing service delivery

Task 1 – Contacting the beneficiary

- ✓ *Contacting the beneficiary, sending and collecting the Pre-assessment template and BOSAT form*

Task 2 – Agreeing on activities (Service Delivery Plan - SDP)

- ✓ *Within 7 working days, organise a **call** with the Coordinator to discuss the content of the service, collect feedbacks and **agree on the next steps and their timing***

Task 3 – Prioritizing support

- ✓ *The Expert asks the Coordinator to run the BOSAT*

Activities (2/3)

2 Preparation of the workshop

Task 1 – On-line capacity building

1. **Webinar** on *Lean Canvas*
2. After webinar sending tools and templates to be used in the next steps (The Business plan structure template, Lean canvas e roadmap).

Task 2 – BPD workshop

1. Beneficiaries provide the first version of the **Lean Canvas** and **Business Plan**
2. Expert sends the *First Set of Guidelines*
3. **Workshop** covering:
 - ✓ An introduction to **business planning**
 - ✓ Review of the *Lean Canvas*
 - ✓ Focus on **revenue streams** and **costs** structure
 - ✓ Drafting the **implementation roadmap**

Activities (3/3)

3 Finalising the service

Task 1 – Follow-on coaching to further discuss aspects such as:

- ✓ How to **reach out early adopters**
- ✓ Business model with **revenues and costs**
- ✓ **Financial needs**
- ✓ **Next steps** after the end of the project - Implementation **roadmap**

Task 2 – Implementation plan and final report

1. Reviewing all materials produced and adding recommendations for the future implementation of the business plan
2. The Expert prepares a BPD Final Report summarising recommendations and information on next steps
3. Fill in the feedback form

BPD Workshop Agenda

- **Ice breaking**
Pre-meeting with the Coordinator, Welcome, Presenting the day
- **Towards an effective Exploitation Strategy: The business planning process**
Introducing Business planning “Business plan is a journey”, Q&A session
- **Towards an effective exploitation plan**
Working on the Lean Canvas and on the first draft of the Business Plan structure template
- **The Exploitation Roadmap**
Discussing the key actions to be performed after the project’s end
- **Sharing results open discussion**

Delivery Steps

Steps	Deadline
Expert official appointment	Day 0
Expert first contact with project	Day 1-3
Introductory Call	Within one week form first contact
Lean Canvas Webinar	3 weeks before BPD
Collection of draft Business Plan Structure, Roadmap and Lean Canvas	10 working days before BPD
First set of guidelines submitted	5 working days before BPD
BPD workshop and collection of feedback forms	Data agreed with project
BPD final report due	2 weeks after BPD seminar

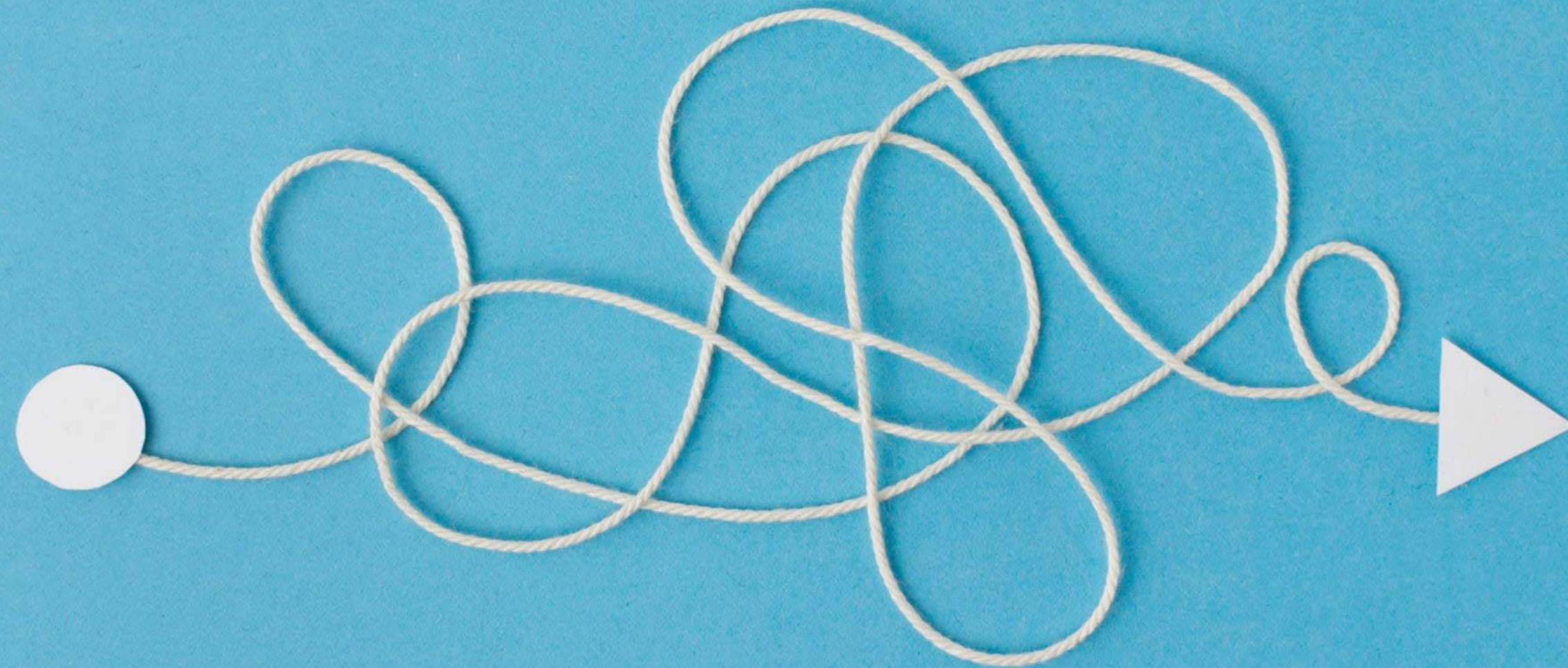
To keep in mind, before you start...

- The «Booster» is a **learning experience**
- Allignement of the **expectations**
- Focus on the **deadlines**
- Focus on the **key concepts**
- Clarity of purposes of the **tools**





“You do not really understand something unless you can explain it to your grandmother.” - Albert Einstein



Antonello Fiorucci

a.fiorucci@meta-group.com

www.horizonresultsbooster.eu



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