

The Social Venture Café

***Social Venture Start-ups Serving Our Community's Needs
Through Innovation***

Building A Winning Team



The Breakaway Social Venture Start-up Framework

Stage 2 - Step 2

Building A Winning Team

~Diversity in Capabilities and Perspectives~

Building A Winning Team



Building A Winning Team

Diversity in Capabilities and Perspectives

- ❖ Your Objective
- ❖ The Three Step Process
- ❖ Mapping to the Social Venture Start-up Lifecycle
- ❖ Clarifying and Summarizing What You Need and Want

Your Objective

Building A Winning Team

*Quite simply, put together a mix of motivationally aligned people who posses the capabilities, experiences, technical , and teaming skills to efficiently and effectively get the work to be done, **done!***



Three Steps To Building A Winning Team

Step 1 - *Clarifying what you need and want*

Step 2 - *Finding the right direct vs indirect team balance*

Step 3 - *Successfully recruiting and onboarding your winning team*

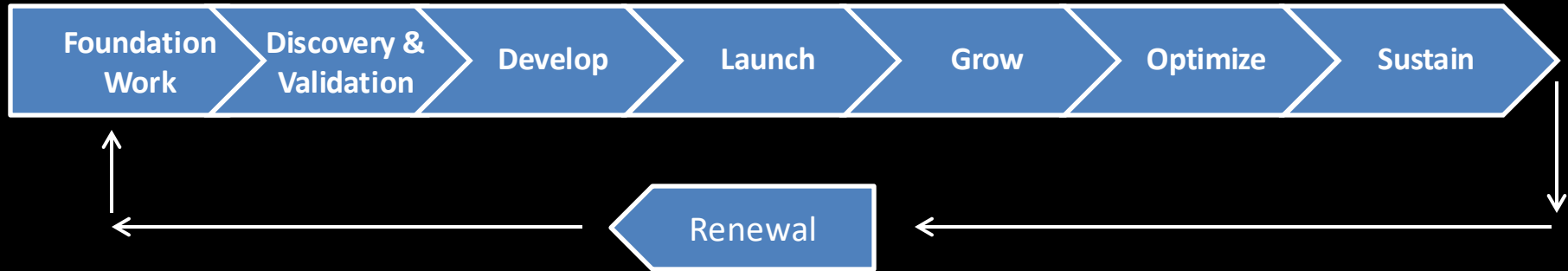
Three Steps To Building A Winning Team

Step 1

Clarifying what you need and want

The Social Venture Lifecycle

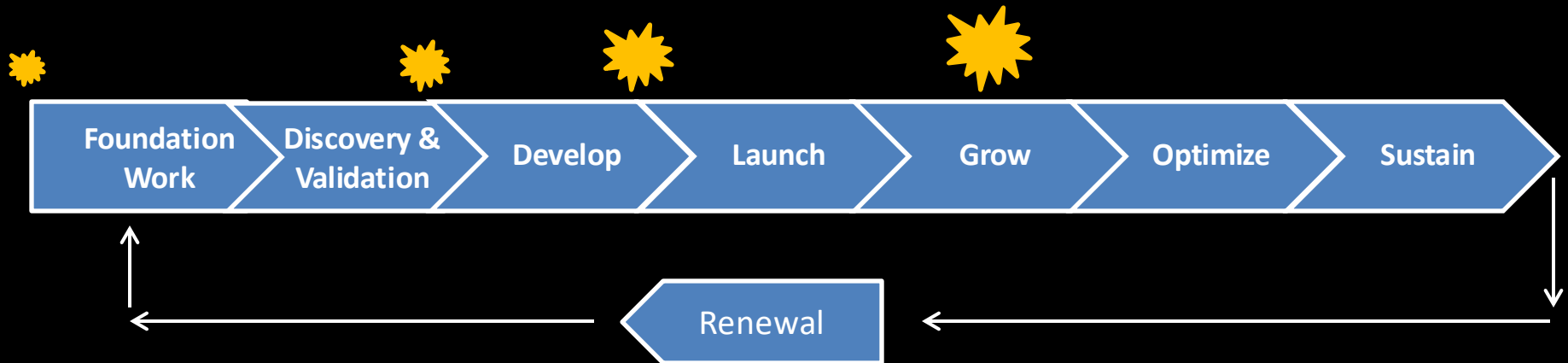
Every social venture goes through a similar series of phases ; from its creation through its death or renewal. When seen end-to-end, this is referred to as the social Venture “Lifecycle”. This lifecycle model suggests how the work to be done and the mix of team skills and capabilities necessary to get it done (in an efficient and effective manner) changes over time.



The Social Venture Lifecycle

Key Funding and Sponsorship Points

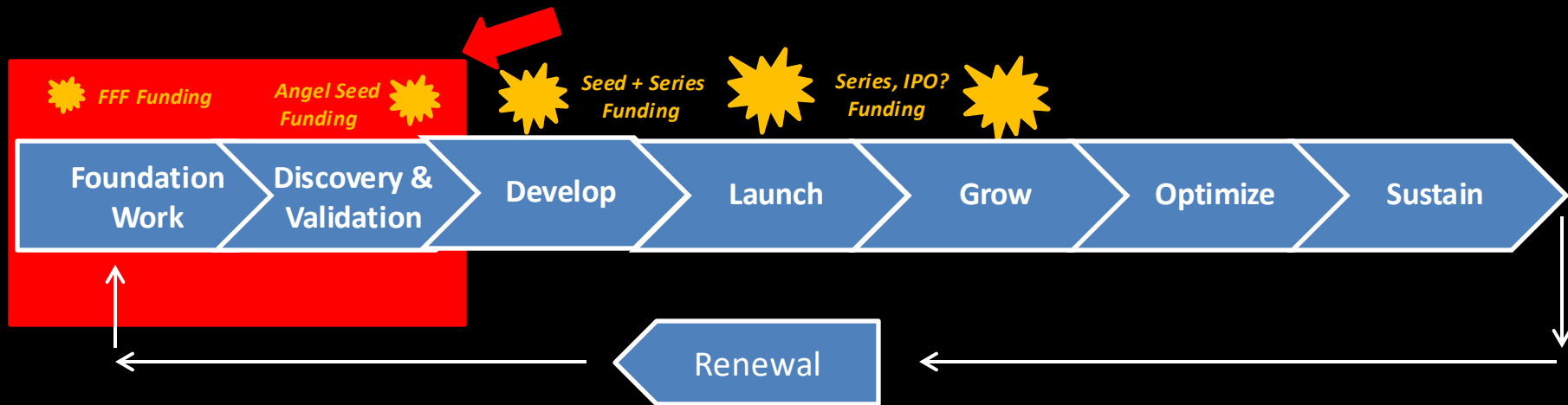
Critical funding and sponsorship milestones typically occur along the lifecycle. At each point, the level of funding and sponsorship increases to parallel the subsequent work and operational investments determined necessary for the venture to move forward.



The Breakaway Social Venture Start-up Framework

- Lifecycle Area of Focus -

The Breakaway Social Venture Start-up Framework is designed to help social venture entrepreneurs ***avoid missteps and “Change the Odds”*** in regard to ***securing the essential early-stage funding and sponsorship*** commitments necessary to support the full development, launch, and growth of their venture.



Clarifying What You Need And Want

- Work to be Done
- Technical Skills and Capabilities Required
- Challenge Area Knowledge, Exposure, and Experiences Needed
- Venture /Innovation Program Development Experiences Needed
- Teaming & Communication Skills Preferred
- Motivational Alignment and Compatibility

Clarifying What You Need And Want

	"You"	The Right Start		The Right Goals		The Right Idea			The Right Story	
	Defining Success	Field of Interest	Picking the Winning Team	Common Understanding	Stakeholder Objectives	Empathic Marketing Research	Ideation Magic	Filter & Select	Validation & Feedback	Telling a Winning Story
Work To be Done:										
Technical Skills & Capabilities										
Domain Experience & Knowledge										
Venture /Program Development Experiences										
Teaming & Communication Skills										
Motivational alignment & Compatibility										

***The goal in picking a winning team:
Quite simply, put together a mix of
motivationally aligned people who posses
the capabilities, experiences, and technical
and teaming skills to efficiently and
effectively get the work to be done, done!***

Clarifying What You Need And Want

Technical Skills & Capabilities	Domain Experience & Knowledge	Venture/ Program Development Experiences	Teaming & Communication Skills	Motivational Alignment & Compatibility
<ul style="list-style-type: none"> • Need & Ecosystem Research • Design: Idea, Concept, Dev • Service Devel/Mgmt. • Product Devel • Partnerships/Alliances • Operations Mgmt. • Opportunity Devel. • Marketing & Comms • Sales/Dist. channel development-Mgmt.. • Funding & Grant Mgmt. • Community Relations • Project Mgmt. • Legal/Regulatory • HR/Org Development • Finance/Acctg. 	<ul style="list-style-type: none"> • Venture/Program Field of Interest • Community ecosystem structure/ dynamics • Stakeholder structures/dynamics • Grant & Funding environment & dynamics • Segment culture ,ethnic, gender dynamics • Community Partnership & Alliances: structures/dynamics 	<ul style="list-style-type: none"> • Empathic community research efforts • Range & track record of similar or related new venture or innovation program creation work • Product vs services solution focus history • Track record of individual and team contributions/accomplishment • Demonstrated Lifecycle phase engagement • Venture/program type: Service v product 	<ul style="list-style-type: none"> • Role Preferences: <ul style="list-style-type: none"> + Leader vs follower + Clarifier, Ideator, Planner, Implementer. • Interpersonal Style: <ul style="list-style-type: none"> +Assertive, analytical, amiable, expressive. • Personal drive: <ul style="list-style-type: none"> +Outcome vs process +Ready-aim-fire v Ready-fire-aim. • Risk: <ul style="list-style-type: none"> +Avoidance vs Mgmt. • Comfort levels around: <ul style="list-style-type: none"> +Flexibility, agility, adaptability; pace of change • Leadership likes/dislikes 	<ul style="list-style-type: none"> • Personal motivational profile: <ul style="list-style-type: none"> +Purpose, Mastery, Autonomy, Equity, ,Relationships • Needs & Preferences around: <ul style="list-style-type: none"> +Time commitment +Public v private acknowledgment & rewards +Monetary rewards +Field of work/focus +Team structure, role/responsibility, make-up +Team relationships +Fun Factor Balance

Three Steps To Building A Winning Team

Step 2

Finding the right direct vs indirect team balance



An Agile And Flexible Direct Team

- ❖ Ideally 5 +/- 2 Direct Team Members; we recommend 3
 - e.g., Need & Ecosystem Research, Design/Development, Biz/Venture Development
- ❖ Diverse technical talents and backgrounds
- ❖ Deep Community awareness and Insight held by at least one
- ❖ Complementary thinking, communication, and working styles
- ❖ Advisors in Finance, Legal, Operations, etc..

Three Steps To Building A Winning Team

Step 3

Successfully recruiting and onboarding
your winning team



Talent Sourcing & Onboarding For Success

❖ *Sourcing :*

- Leverage Universities, Encore Talent, & Community Advocates
- Leverage nonprofit and public services volunteers & professionals

❖ *Ensure technical, motivational, and interpersonal fit*

❖ *Create your own distinct team culture; onboard thoughtfully:*

- “Go slow to go fast!”, Establish a collaborative culture within a “Director-driven” Venture, Every contribution is valued, breakthroughs can be found somewhere between different views, Aligned teaming norms; “what are we going to do and how are we going to do it?, Balance team values with personal values

Backup

*~ Further details on “**Work to be done**”: key deliverables and focus of the team and its team members across the Breakaway Social Venture Start-up Framework stages ~*

Nature Of The Work To Be Done

	"You"	The Right Start		The Right Goals		The Right Idea			The Right Story	
	Defining Success	Field of Interest	Picking the Winning Team	Common Understanding	Stakeholder Objectives	Empathic Marketing Research	Ideation Magic	Filter & Select	Validation & Feedback	Telling a Winning Story

Work To be Done:

- **Defining "Success"** on your own terms: Leader's self assessment and Leader's Success Attribute / design Brief document
- **Clarifying your Field of Interest:** Analysis of passion and interest areas; Creation of Filed of Interest Summary Matrix.
- **Picking the Winning Team:** Assessment of work to be done and team/team member skill, capability, teaming, and motivational preferences & requirements Finding, recruiting ,and onboarding direct team members as well as indirect advisory and support
- **Building a shared/common understanding:** Primary and secondary research to understand community challenge, need, and problem areas and the ecosystem that supports and/or inhibits serving those; Goal is to develop a shared understanding and view of the current "lay of the land" within the community as well as how other communities are addressing/not addressing similar challenges, needs, and problems. Goal is to develop a shared view of the Field of Interest and to produce a Community Ecosystem Map that captures those views along with supporting reference materials that can be used and added to throughout the team's social venture creation or innovation program efforts.
- **Stakeholders Objectives:** Primary and secondary research to assess all stakeholder groups within the community Filed of Interest to determine their goals, objectives, and priorities in regard to better serving the targeted area of challenge, need, problem. Work produces a overview of the various categories of stakeholders, their goals, objectives ,and priorities, their ecosystem relationships, and ultimately, answers the question: "What's In It For Them?" in regard to sustaining the Status Quo or actively engaging in changing the status quo and relations that exist within the current ecosystem. This includes assessing all current and potential funding sources that conceivably would consider supporting and sponsoring new venture creation or innovation program work to better serve the targeted area of community challenge, need, or problem.

Nature Of The Work To Be Done (Cont.)

	"You"	The Right Start		The Right Goals		The Right Idea			The Right Story	
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Work To be Done:

- **Empathic Marketing Research**: Team engages in direct community challenge, need, problem assessment and empathic marketing activities: i.e., Observation, Classification, Conversation, Descriptive, and Community participation work. Goal of this work is to develop a be deep and intimate understanding and appreciation of the community challenge, need, or problem area and to , as a team, produce a shared and richly described view of “a day in the life” of the community members and /or groups being affected by the challenge, need, or problem as well as of those co mmunity members and organizations that are directly or indirectly engaged in, or impacted by, the targeted community challenge, need, or problem. Outcome here is that the team has a shared intellectual and emotional view of the challenge, need, or problem’s impact throughout the community as wel l as documented artifacts (slides, narrative documents, videos, etc.) that capture these “day in the life” situations and help bring focus and insight to a range of opportunities for those “Day In The Life” stories to be impacted through new social venture start-up’s focus.

Nature Of The Work To Be Done (Cont.)

	"You"	The Right Start		The Right Goals		The Right Idea			The Right Story	
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Work To be Done:

- **Ideation Magic:** Team engages in process of ideation. Team members must be able to use and facilitate the use of wide range of creativity and ideation tools and processes to support their work. Members of team need to be able to think creatively; including being able to bring insights from other industries, sectors, venture/business models, think about innovative in broad terms that span across the community & regions social value delivery system, etc.. Ability to communicate visually and verbally in a highly effective and collaborative manner is critical. Rapid prototyping is a key process element in this stage. Output of this stage include: A large set of ideas that have potential to address the "Day in the life-today" stories with positive impact (ideas can be captured in various means; e.g., list, visuals/concept sketches, stories, rough prototypes, etc.). Idea volume should be high and focus of those ideas broad; across a range of approaches to help create a positive change to the "day in the life-today" story.
- **Filter and Select:** Team shifts their work towards analyzing all ideas generated into how they "fit" (address) key success attributes identified earlier as essential to the venture's success. The team develops a rating matrix where each solution idea is shown as a separate column and every row reflects a stakeholder goal or success factor attribute (e.g. financial, emotional, physical, intellectual, relational, political, time, or risk level tolerance interests). Rows start with those goals, objectives, priorities, and preferences associated with each "Essential" stakeholders, followed by those for each "Strategic Stakeholder", followed by those for each "Important Stakeholder", etc.. Each idea is rated/scored against these various success attributes and the final tally used to best identify those handful of ideas that best match the full suite of success attributes; especially this that are most essential to the venture/innovation program's success in gaining funding and full development sponsorship. In addition to using a rating matrix approach, the team often applies a number of other evaluation approaches to fully debate, discuss, and finally align on, the top few (~5) ideas to take forward and evaluated; i.e., via more fully developed prototypes, concept sketches, design feasibility assessments, and third-party design partner/community partner feedback. Following this additional work, the team makes a final selection of top two ideas they think most desirable, feasible, viable that they will then take forward into the validation and feedback stage.

Nature Of The Work To Be Done (Cont.)

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Work To be Done:

Validation and feedback: This step requires the team to take an iterative approach to their work and engage with a broader set of community and stakeholder groups than have engaged up to this point. This is essential and the team should be encouraged to get external validation in regards to the ideas desirability, feasibility, and viability; using appropriate levels of direct and active engagement with their targeted community members and/or groups, ecosystem support partners, and funding or sponsorship stakeholders. The goal is to flesh out and test as many of the desirability, feasibility and viability "leaps of faith" assumptions you've consciously or unconsciously made and then, through use external feedback, tune and perfect the new social venture or social innovation concept into a tight, well-tuned and validated design. You and your team are not "selling" the initial ideas and solutions you have developed but instead are looking for unbiased feedback and/or to simply observing how people, groups, organizations react to those ideas and solutions.

As you prepare to exit this first step, you and your team should find that you have honed your new social venture down in terms of fully understanding: 1) the area of community problem/challenge focus, 2) its current community ecosystem and how its various participants are engaged in serving those needs/challenges and the range of solutions and approaches being employed to serve them, 3) your new social venture or social venture idea/solution and how it creates a desirable and positive new "day in the life" possibility for those that it is designed to serve, 4) the actionable and executable activities necessary to fully develop, launch, and sustain the new social venture and to validate its feasibility, 5) the short-term, medium-term, and long-term time, talent, resource investment & return model that will be followed to support ensuring the new venture's sustainability, and 6) how your plan supports achieving the goals, objectives, priorities, and preferences of those essential, strategic, and important stakeholders which you've previously identified as critical to the success of the new social venture or social venture (in terms of securing the necessary funding and/or sponsorship required to transition from the early SEED stage of your new social venture start-up concept and design development work into the next phase of work; full development and launch/implementation.)

Nature Of The Work To Be Done (Cont.)

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Work To be Done:

Telling a Winning Story: The goal of your social venture proposal(written documentation) is to provide an organized body of information that can be used to support efficiently and effectively communicating your new social venture proposal to others and to do so in a manner that is structured to be relatively familiar but yet stylistically designed to come across as fresh and visually engaging. Remember that this documentation's fundamental purpose is to communicate how your social venture : 1) acts to help address a pervasive and urgent problem in the community, 2) provides those products and services in a manner that is proven to be desirable to those who will benefit from them, 3) is feasible in terms of being executable and actionable into value by you and your ecosystem partners and alliances, 4) is viable in terms of building and sustaining a position of favorable advantage versus other alternatives and in attracting a consistent flow of time, talent, and financial resources/earned income necessary to sustain its ongoing investment and operational needs, and 5) meets or exceeds the objectives of its essential and strategic stakeholders.

This step is about producing a document and supporting set of collateral that can be used to capture the integrated set of decisions and related plans necessary to bring your social venture or social innovation program into being and ensure it is viable in regards to being able to be operated in a sustainable manner over time that fulfills its social return on investment and stakeholder promises. This document contains the core master set of information which will be used used to communicate the venture or innovation program to others; new team members, stakeholders, clients, community, etc.

Notes – Implications – Applications – Action Plans

Page 1

Notes: Observations – Thoughts – Insights - Follow-up Questions

Implications: In what way will using these ideas/tools help me in achieving success?

Notes – Implications – Applications – Action Plans

Page 2

Application: How will I specifically apply these ideas/tools to my start-up activities?

Action Plans: When will I apply these ideas/tools to my start-up efforts and what outcomes will I try to achieve as a result?