WHERE VALUE LIVES

EXECUTIVE IMPLEMENTATION TOOL

Pre-Proposal Value Co-Creation Canvas Workbook

A bounded working process for creating clarity, testing value and deciding whether a proposal is justified.

SUPPORTING CHAPTER 19

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How to Use This Workbook

Use this workbook before a formal proposal is written. It can support an account-team review, a bounded customer workshop or a sequence of focused conversations. Its purpose is to improve shared understanding and decide whether a proposal is justified - not to steer the customer towards a predetermined offer.

CORE PRINCIPLE
In a strategic relationship, the proposal should capture value creation already under way. It should not be the first place the customer encounters our thinking.

A disciplined working method

1. Bound - Agree the topic, participants, time commitment and decision to be advanced.

2. Discover - Understand context, friction, consequences, stakeholders and risk.

3. Test - State value hypotheses clearly enough for the customer to confirm, refine or reject.

4. Compare - Explore options, trade-offs, earlier attempts and evidence needs.

5. Commit - Define mutual contribution, success and the next useful step.

6. Decide - Propose, pause, reshape or decline according to the quality of understanding and mutuality.

Evidence discipline

Label	Meaning
DIRECT EVIDENCE	Observed statement, data, behaviour or decision.
REASONABLE INFERENCE	Several signals support the view, but it remains unconfirmed.
ASSUMPTION	A belief that must be tested before it shapes the proposal.
UNKNOWN	Information neither side currently possesses.

1. Co-Creation Investment Gate

Organisational attention is selective. Decide how much pre-proposal investment the relationship and opportunity justify before mobilising scarce expertise.

Customer / account
Opportunity or issue being explored
Strategic relevance to the customer
Strategic relevance to us
Customer participation already demonstrated
Access to the right stakeholders
Credibility of timing, budget and decision path
Estimated supplier attention required
What deeper work would require commercial commitment?

Investment decision

Proceed	Proceed with boundaries	Pause / test	Decline

GATE QUESTION
What level of pre-proposal investment is justified by strategic value, mutual engagement and the credibility of the opportunity?

2. Working Agreement and Boundaries

Co-creation should be purposeful, time-conscious and mutual. Record the agreement before the work expands.

Specific purpose of this co-creation work
What decision or understanding should improve?
Included questions and topics
Explicitly out of scope
Customer participants and roles
Supplier participants and roles
Timebox / number of sessions
Information each side will provide
Confidentiality or intellectual-property boundaries
Point at which deeper diagnostic or design work becomes paid work
Agreed review point

MUTUALITY TEST
If all work belongs to the supplier, the customer is consuming attention rather than co-creating value.

3. Ten-Part Co-Creation Canvas - Overview

Use this page as the shared summary. The following pages provide space to test and document each field in depth.

1. Strategic context	6. Value hypotheses
2. Trigger, problem and friction	7. Options and trade-offs
3. Consequences of inaction	8. Evidence needed
4. Stakeholders and risks	9. Mutual contribution
5. Desired outcomes and success	10. Mutual next step

Current co-creation judgement

What appears clear?
What remains contested?
What is assumed?
What is unknown?
What must be resolved before a proposal?

USE
A proposal should emerge from this shared picture. It should not introduce a large, polished misunderstanding.

4. Strategic Context

Start with the customer's world - not our product, target or revenue gap. Context changes what value means.

What is changing in the customer's world?
External market, customer, competitor or regulatory pressures
Internal strategy, leadership, capability or cost pressures
Why this matters now
What has become harder than it used to be?
What ambition has outgrown the current approach?
What emotional or confidence issue may sit beneath the formal language?
Customer language we should preserve
Direct evidence supporting this context

Context-to-value translation

Context signal	Possible value meaning	Evidence / source

5. Trigger, Problem and Friction

Distinguish the stated requirement from the problem worth solving. Customers can describe what they can currently see; co-creation examines the frame.

Formal request or stated requirement
Trigger that brought the issue into view
Observed symptoms
Underlying problem hypothesis
Where the current model creates friction
Who experiences that friction most directly
What the customer is trying to improve, avoid, protect or achieve
What would make this strategically important rather than merely interesting?

Problem hypotheses to test

Hypothesis	Evidence for	Evidence against	Question to test

QUALITY TEST
Are we solving the problem behind the requirement, or enthusiastically accepting a flawed brief?

6. Consequences of Inaction

A meaningful consequence separates an interesting issue from one that deserves serious attention.

Consequence	Who feels it?	Timing	Evidence	Materiality H/M/L

Consequence lenses

Cost or waste that continues
Risk that grows
Opportunity that is lost
Customer or employee frustration that remains
Strategic priority made harder
Confidence, reputation or political consequence
What becomes irreversible if action is delayed?
READINESS TEST If nothing meaningful happens when nothing changes, the opportunity may not yet justify a proposal.

7. Stakeholders and Risks

Involve enough of the stakeholder system to make value robust - not everyone, but enough of the right people.

Stakeholder / function	Outcome owned	Risk carried	Evidence needed	Role before proposal

Voices and risks to surface

Whose version of value have we not heard?
Who could block this later?
Who will live with the consequences?
Who owns implementation and adoption?
Who must recognise and repeat the evidence?
Which risk are we most tempted to understate?

COVERAGE TEST
Are we co-creating with the customer system, or building a beautiful little castle with one friendly stakeholder?

8. Desired Outcomes and Success

Define what changes because the work is done. Contract award is a supplier milestone, not the customer outcome.

Outcome	For whom?	6-month evidence	12-month evidence	Owner

Success definition

Customer success - what improves in their world?
Different stakeholder definitions of success
What must be protected while change occurs?
Leading indicators
Lagging measures
How and when value will be reviewed
Supplier success - sustainable return and learning

RECOGNITION TEST
How will the customer know, believe and communicate that value has been created?

9. Value Hypotheses

A value hypothesis is not a claim. State where value may be created clearly enough for the customer to confirm, refine or reject it.

Value hypothesis	Stakeholder lens	Evidence now	Test / question	Status

Hypothesis quality check

☐ Specific enough to challenge

☐ Connected to customer context

☐ Expressed in customer language

☐ Names an outcome rather than an activity

☐ Acknowledges risk or dependency

☐ Can be tested before the proposal

DRAFTING STEM
We believe value may be created by [change], because it could improve [customer outcome] for [stakeholder], provided that [dependency or risk] is addressed.

10. Options, Trade-Offs and Customer History

Strategic value often lives in trade-offs. Explore more than one credible path and understand what the customer has already tried.

Option	Advantages	Risks / limits	Trade-off	Conditions for success

Customer history

Internal fixes already attempted
Previous suppliers or approaches
Why earlier options stalled or failed
Technology, process or capability already in place
Budget scars, commitments or political sensitivities
Promises already made internally

COMPARISON TEST
Are we helping the customer make a meaningful comparison, or merely framing the choice around our strengths?

11. Evidence Needed

Evidence must be designed for recognition. Different stakeholders believe, use and repeat different forms of proof.

Stakeholder / function	Claim or hypothesis	Evidence required	Source / method	Gap / action

Evidence design review

Financial logic for the economic buyer
Feasibility evidence for technical or risk gatekeepers
Usability or adoption proof for users
Strategic alignment for the executive sponsor
Comparability and defensibility for procurement
Portable language and proof for the champion
Risk reduction evidence for sceptics

STANDARD
A proposition is what we claim. Evidence is what the customer can believe, use and repeat internally.

12. Mutual Contribution

Strategic value is co-produced. Name what each side must bring before asking either organisation to invest further.

Contribution	Customer provides	Supplier provides	Owner	By when	Evidence complete

Contribution categories

Access and stakeholder time
Data and operational context
Insight, expertise and challenge
Options, examples and analysis
Honest feedback and decision criteria
Implementation, adoption and governance capacity
SERIOUSNESS TEST Does the contribution pattern demonstrate shared seriousness, or is one side carrying the entire burden?

13. Mutual Next Step and Proposal Readiness

Co-creation must move. The next step should improve understanding, evidence, alignment or the decision on whether to propose.

Mutual next step
Purpose
Customer action and owner
Supplier action and owner
Information or evidence required
Date / review point
Decision expected at review

Proposal readiness gate

Question	Yes	Partial	No / unknown	Action required
Problem understood				
Value hypotheses tested				
Right stakeholders involved				
Material risks surfaced				
Evidence requirements clear				
Mutual contribution credible				
Winning would create sustainable mutual value				

DECISION
Choose one: PROPOSE / CONTINUE DISCOVERY / RESHAPE / PAUSE / DECLINE. A proposal is an investment, not a reflex.

14. Co-Creation Session Record

Session purpose and date
Participants and roles
What we learned
What the customer confirmed
What the customer challenged or rejected
New or changed value hypotheses
Risks or constraints surfaced
Evidence requested
Decisions made
Unresolved questions
Mutual actions, owners and dates

Facilitator reflection

Where did shared understanding improve?
Where did supplier assumptions remain dominant?
Did every material voice have room to contribute?
What must not be represented as customer agreement?

ETHICAL TEST
Would the customer be better informed because of our involvement, even if they decided not to buy from us?

15. Leadership Summary and 90-Day Actions

Customer context and problem worth solving	
Most credible value hypothesis	
Most material consequence of inaction	
Stakeholder or risk requiring attention	
Critical evidence gap	
Boundary on further unpaid work	
Recommended proposal decision	
Leadership decision or support required	

90-day action plan

Action	Customer outcome	Mutual contribution	Owner	By when	Evidence of progress

FINAL STANDARD
The proposal should capture shared thinking, tested hypotheses, customer language, stakeholder concerns, evidence needs, mutual contribution and a clear decision story.