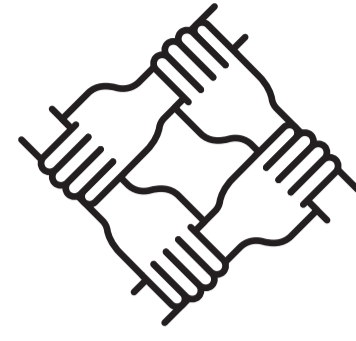


Name:

# Personal Business Model

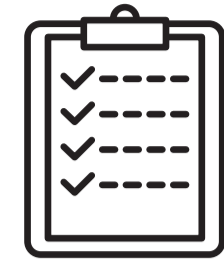
## Who Helps You (Key Partners)



Who helps you provide Value to others?  
Who supports you in other ways, and how?  
Do any partners supply Key Resources or perform Key Activities on your behalf? Could they?

- Key Partners could include:**
- Friends
  - Family members
  - Supervisors
  - Human resource personnel
  - Coworkers
  - Professional association members
  - Mentors or counselors, etc.

## What You Do (Key Activities)



List several critical activities you perform each day that distinguish your work from other people's work.  
Which of these activities does your Value Offered require?  
Which activities do your Channels and Customer Relationships require?

## How You Help (Value Offered)



What Value do you offer to Customers?  
What problem do you solve or need do you satisfy?  
Describe specific benefits Customers enjoy as a result of your work.  
These might include:

- Basic need fulfillment (food, clothing, shelter, healthcare, security)
- Emotional satisfaction
- Social need fulfillment
- Increased enjoyment
- Lower cost
- Reduced risk
- Improved performance
- Better convenience or usability
- Improved operations

## Roles/Relationships (Customer Relationships)



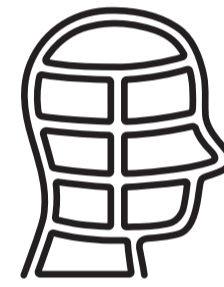
Characterize the role you play or the relationship you have with each client or customer (for example: persuader, caregiver, expert, producer, advisor, trainer, etc.).

## Who You Help (Customers)



For whom do you create Value?  
Who is your most important Customer?  
Who depends on your work in order to get their own jobs done?  
Who are your Customers' Customers?

## Who You Are/ What You Have (Key Resources)



What excites you most about your work?  
What do you find least exciting about your work?  
Describe what you do best at work.  
Describe any personal values or beliefs that influence your work.

## How They Know You/ How You Deliver (Channels)



Through which Channels do your Customers want to be reached? How are you reaching them now?  
Which Channels work best?

**Five Channel Phases:**

1. Awareness  
How do potential Customers find out about How You Help?
2. Evaluation  
How do you help potential Customers evaluate How You Help?
3. Purchase  
How do new Customers hire you or buy your services?
4. Delivery  
How do you deliver your help to Customers?
5. Follow-up  
How do you continue to support Customers and make sure they are satisfied?

## What You Give (Costs)

What do you give to your work (time, energy, etc.)?  
What do you give up in order to work (family/personal time, other attractive opportunities, etc.)?  
Which Key Activities are most "expensive" (draining, stressful, etc.)?

**List soft and hard costs associated with your work:**

- Soft costs:**
- Stress or dissatisfaction
  - Lack of personal or professional growth
  - Missed opportunities
  - Low recognition or lack of social contribution
  - Lack of flexibility, excessive availability expectations
- Hard costs:**
- Excessive time or travel commitments
  - Unreimbursed commuting, travel, training, or other expenses



## What You Get (Revenue and Benefits)

Describe your two most important hard benefits (salary, health or disability insurance, retirement savings, stock options, tuition assistance, child care allowance, etc.)

Describe your two most important soft benefits (personal satisfaction/enjoyment, professional development, recognition, social contribution, flexible hours/conditions, sense of community, etc.)

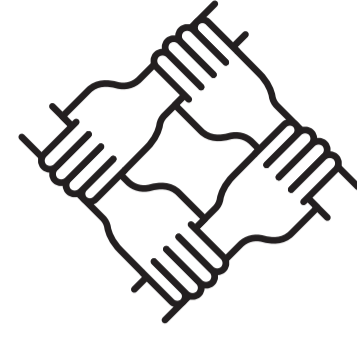


Team Name:

# Team Service Model

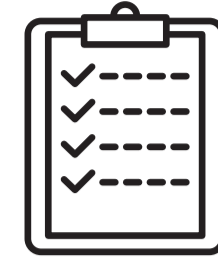
## Key Partners

Key Partners provide a Key Resource and/or perform a Key Activity on your team's behalf. Describe your Key Partners. Distinguish between true partners (without whom delivery and/or follow-up would be impossible) and ordinary suppliers who are readily replaceable.



## Key Activities

Describe the activities most essential to delivering benefits and following up with clients/customers.



## Benefits Offered

How do people benefit from the work your team does? Be specific. Benefits could include:

- Basic need fulfillment (food, clothing, shelter, health care, security)
- Emotional satisfaction
- Social need fulfillment
- Increased enjoyment
- Lower cost
- Reduced risk
- Improved performance
- Better convenience or usability
- Improved operations
- Better society



## Roles/Relationships

Characterize the role your team plays or the relationship it has with each client or customer segment (for example: revenue or profit center, consultant, product/service producer, change agent, etc.).



## Clients/Customers

Who benefits from your team's work? Who depends on your work to get their own work done? Be sure to describe both external and internal clients/customers.



## Key Resources

Five types include:

1. People
2. Intellectual (methodologies, processes, brands, patents, etc)
3. Physical (buildings, machinery, supplies)
4. Financial (cash, cash equivalents)
5. Culture (values, purpose, beliefs)



Describe resources essential to creating/delivering benefits and following up with clients/customers.

## How They Know the Team/ How the Team Delivers

Describe these five service stages:

1. Awareness  
How do people find out about the benefits your team provides?
2. Evaluation  
How do people know you are the right team to do the work?
3. Agreement  
How do you agree upon the terms of the service(s) your team will provide?
4. Delivery  
Describe where/how your team delivers service.
5. Follow-up  
How does your team follow up to make sure clients/customers are satisfied?



In each stage, what portion of activity is conducted in-person? Remotely?

## Costs and Consequences

Describe the financial costs your team incurs (salaries, benefits, key operating expenses). Describe the non-financial consequences of doing your work. Consequences might include:

- High employee turnover
- Suboptimal financial contribution
- Worker disengagement
- Missed opportunity
- Stress, burnout, isolation, or injury
- Adverse social impact or damaged reputation



## Compensation and Rewards

Describe the compensation your team enjoys (revenue, budget allocation, grants, donations, etc.)

Which form of compensation is most important? Describe the non-financial rewards your team enjoys (social contribution, recognition, sense of belonging, mastery, learning). Which non-financial rewards are most important?



Name:

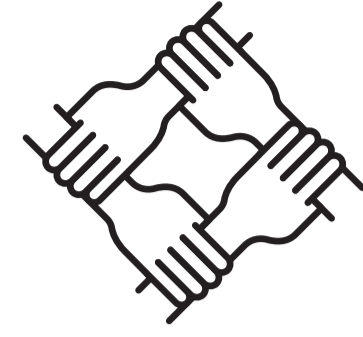
# Personal Service Model

## Who Helps You

Who helps you with your work?

Helpers might include:

- Coworkers
- Leaders
- Suppliers
- External professionals
- Mentors or professional association colleagues
- Spouse or friend



## What You Do

List the most important activities you perform at work.

Which activities are essential to How You Deliver and Roles/Relationships?



## Benefits You Offer

How do people benefit from the work you do?

Be specific. Benefits could include:

- Basic need fulfillment (food, clothing, shelter, healthcare, security)
- Emotional satisfaction
- Social need fulfillment
- Increased enjoyment
- Lower cost
- Reduced risk
- Improved performance
- Better convenience or usability
- Improved operations
- Better society



## Roles/Relationships

Characterize the role you play or the relationship you have with each client or customer (for example: caregiver, consultant, revenue producer, leader, persuader, etc.).



## Who You Help

Describe the people (clients or customers) who benefit from the work you do. Be sure to describe both **external** and **internal** customers. External customers are people **outside** your organization. Internal customers are people **inside** your organization who depend on you to get their own work done

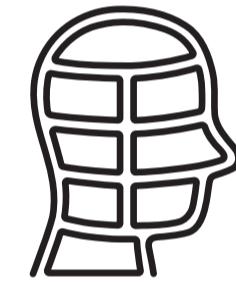


## Who You Are

What excites you most about your work? What do you find least exciting about your work?

Describe what you do best at work.

Describe any personal values or beliefs that influence your work.



## How They Know You/ How You Deliver

Describe these five service stages:

1. Awareness  
How do people find out about the benefits you provide?
2. Evaluation  
How do people know you are the right person to do the work?
3. Agreement  
How do you agree upon the terms of the service(s) you will provide?
4. Delivery  
Describe where/how you deliver service.
5. Follow-up  
How do you follow up to make sure clients/customers are satisfied?



In each stage, what portion of activity do you conduct in-person? Remotely?

## Costs and Consequences

Everyone devotes time and energy to work. What do you give to your work?

What do you give up in order to do your work? What does work take away from you?

Describe any negative consequences of doing your work.



## Compensation and Rewards

Work rewards can be financial (salary, benefits, etc.) or non-financial (social contribution, recognition, sense of belonging, professional development, etc.).

Which financial reward is most important to you?

Which non-financial reward gives you the most satisfaction?

