



# AGENDA



- Disruptors coming in the next 5-10 years
- Strategic planning vs. business modeling
- Innovation and defining business models
- Building your business model (Canvas Handout)
- Governance (Board Time Allocation)



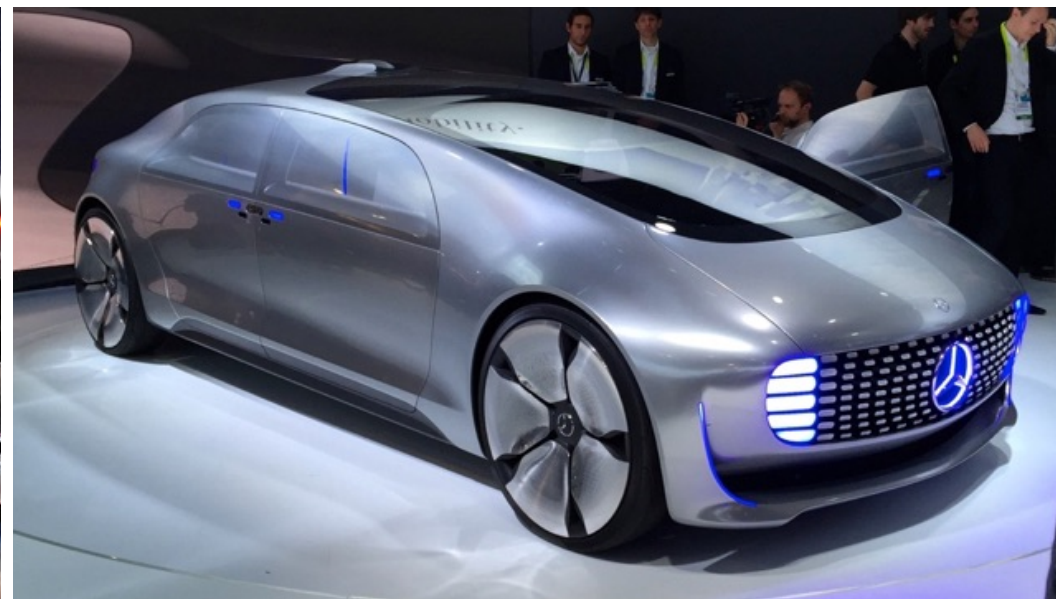


**EDUCATION**  
Classroom?  
Customized?  
Interactive?  
Teacher?

**CURTISSTRATEGY**  
UNLOCKING POTENTIAL



# TRANSPORTATION



**CURTIS STRATEGY**  
UNLOCKING POTENTIAL





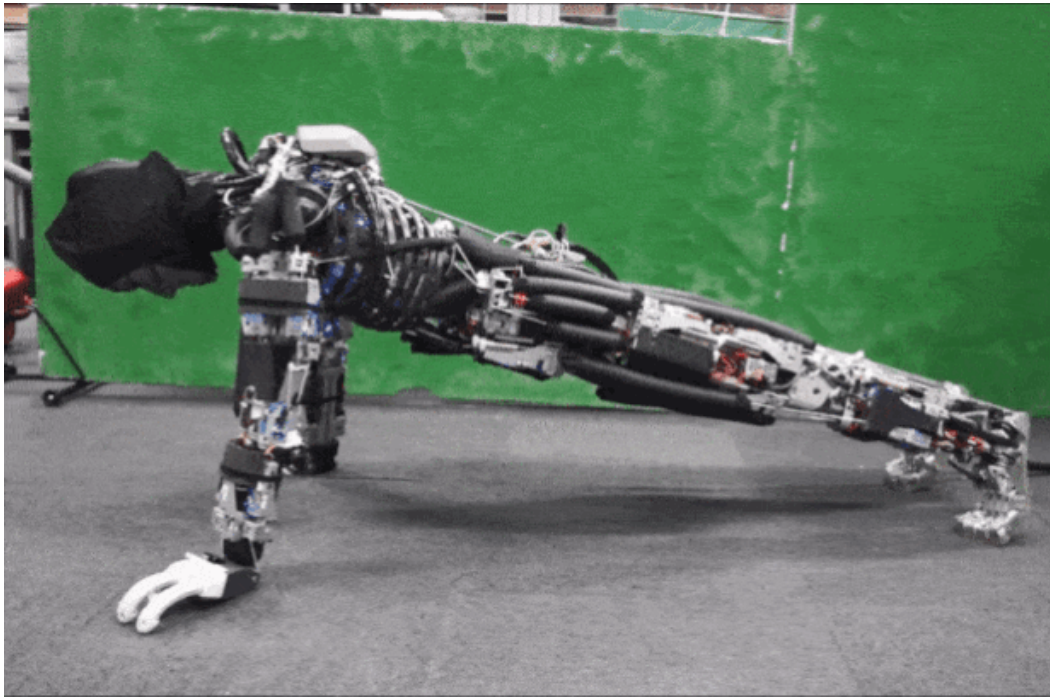
FITNESS WEARABLES  
MEDICAL & INSURANCE  
POPULATION HEALTH MGT.  
ACCOUNTABLE CARE ORG.



**CURTISSTRATEGY**  
UNLOCKING POTENTIAL



# HUMAN SERVICE SERVED BY HUMANS?



**CURTIS**STRATEGY  
UNLOCKING POTENTIAL



# ...STILL ART?



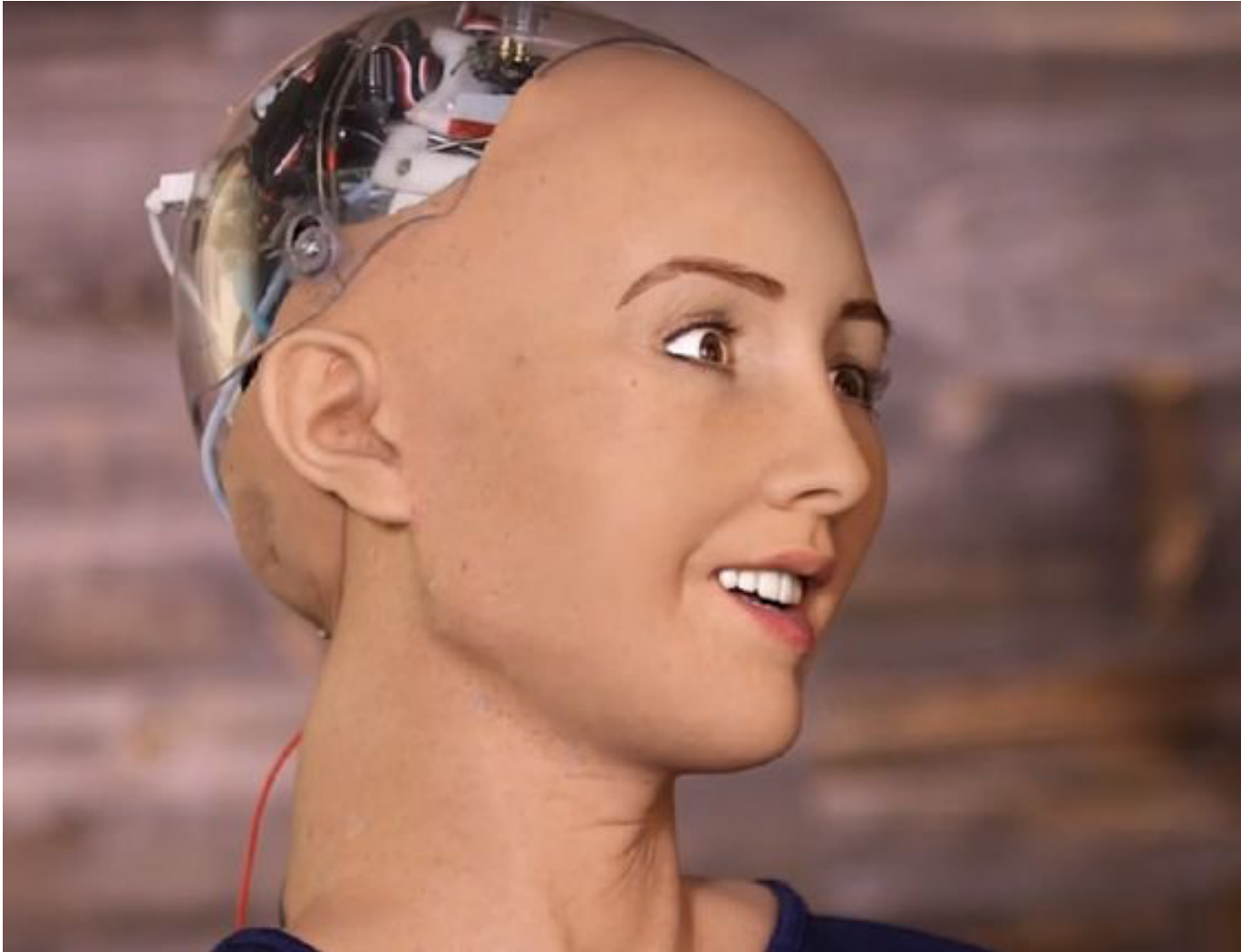
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# BIG DATA & INTERNET OF THINGS





# HUMAN? ARTIFICIAL INTELLIGENCE





~~UNPREPARED~~



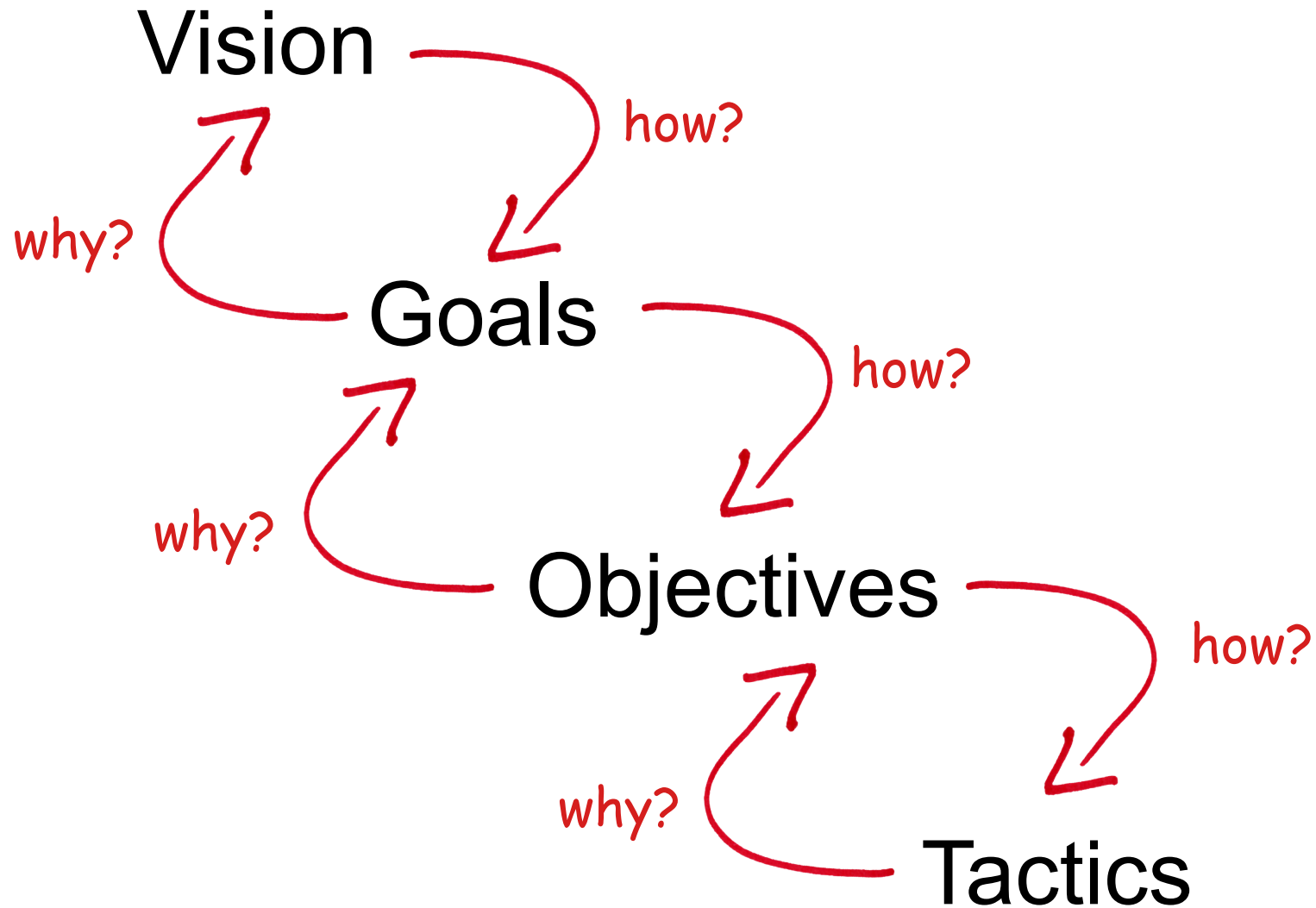
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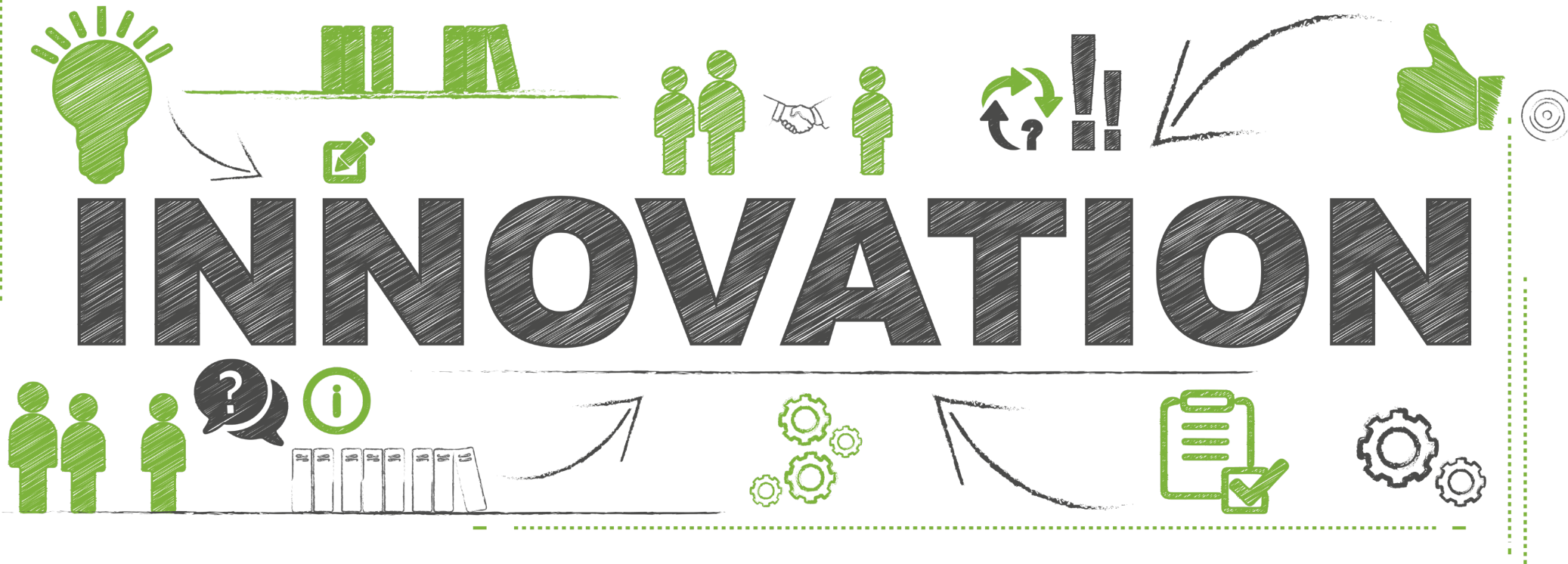
# Strategic Planning



# STRATEGIC PLAN







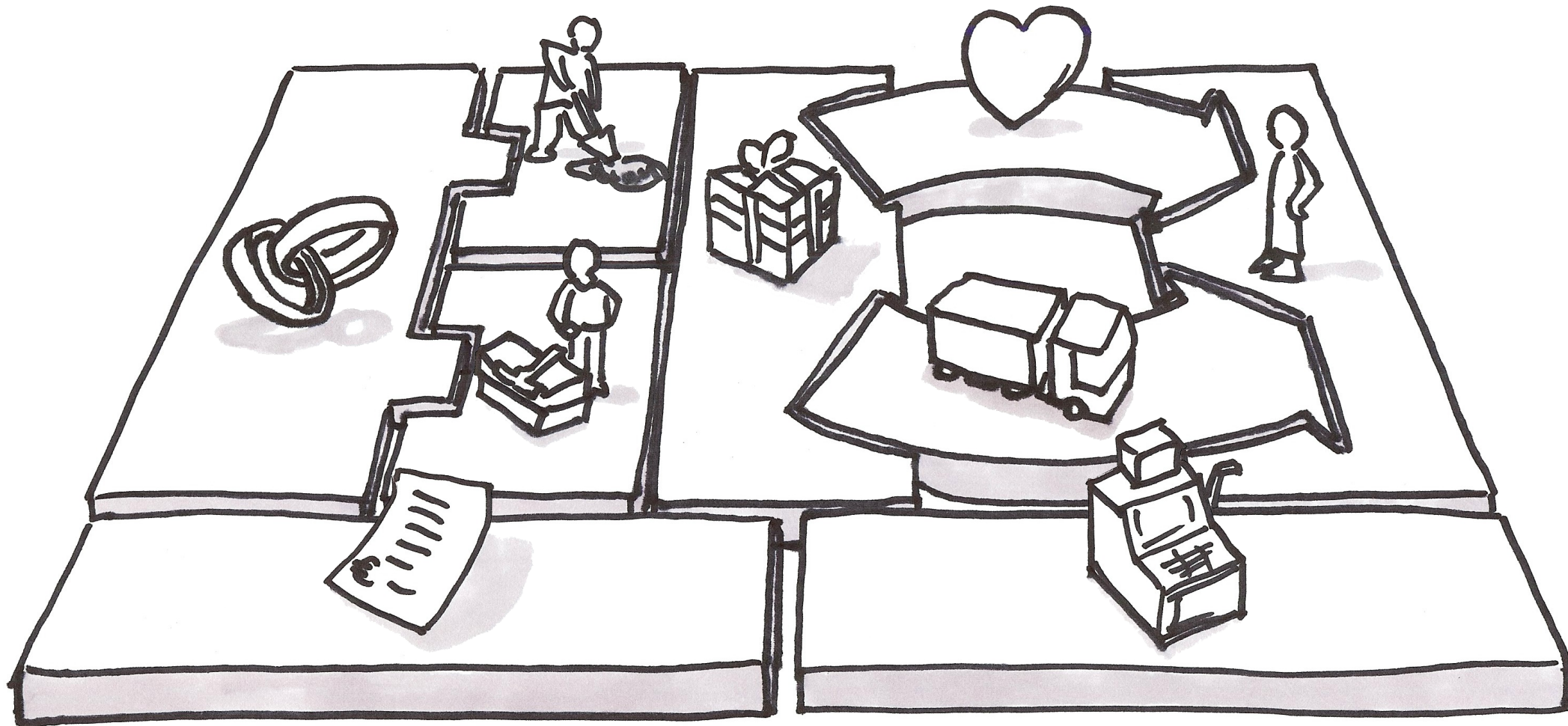
**CURTIS STRATEGY**  
UNLOCKING POTENTIAL

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# BUSINESS MODEL DESIGN

A business model describes the rationale of how an organization creates, delivers, and captures value



**REDUCE**

**TRANSFER**

**RISK**

**ACCEPT**

**AVOID**



**Key  
Partners**



**Key  
Activities**



**Value  
Proposition**



**Customer  
Relationships**



**Customer  
Segments**



**Key  
Resources**



**Channels**



**Cost  
Structure**



**Revenue  
Streams**



*Key Partners*



*Key Activities*



**CAPACITY**

*Key Resources*



*Value Proposition*



*Customer Relationships*



*Customer Segments*



**CUSTOMER**

*Channels*



*Cost Structure*



*Revenue Streams*



**FINANCIALS**





# DESIGN THINKING





## Key Partners



ECONOMY OF SCALE

REDUCE RISK

SHARED RESOURCE

ACTIVITY

## Key Activities



- SERVICE PROCESS
- PRODUCTION
- MARKETING
- DONOR RELATIONS
- ASSET MANAGEMENT

## Key Resources



- PHYSICAL
- INTELLECTUAL
- HUMAN
- FINANCIAL
- BRAND

## Value Proposition



NEWNESS

PRICE

ACCESS

CONVENIENCE

PERFORMANCE

CUSTOMIZATION

BRAND

## Customer Relationships



- 1-ON-1
- VIRTUAL
- SELF-SERVICE
- AUTOMATION
- COMMUNITIES
- ROUTING/BRIDGE

## Channels



1. AWARENESS
2. EVALUTION
3. PURCHASES
4. DELIVERY
5. AFTER SALES

## Customer Segments



MASS MARKET

NICHE MARKET

SEGMENT MARKET

## Cost Structure

FIXED COSTS

VARIABLE COSTS

VALUE DRIVEN

SCALE COSTS



## Revenue Streams

FEDERAL & STATE FUNDING

PRIVATE PAY

MEMBERSHIP

ASSET SALE

PHILANTHROPY



**Key  
Partners**



**Key  
Activities**



**Value  
Proposition**



**Customer  
Relationships**



**Customer  
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NEWNESS

PRICE

ACCESS

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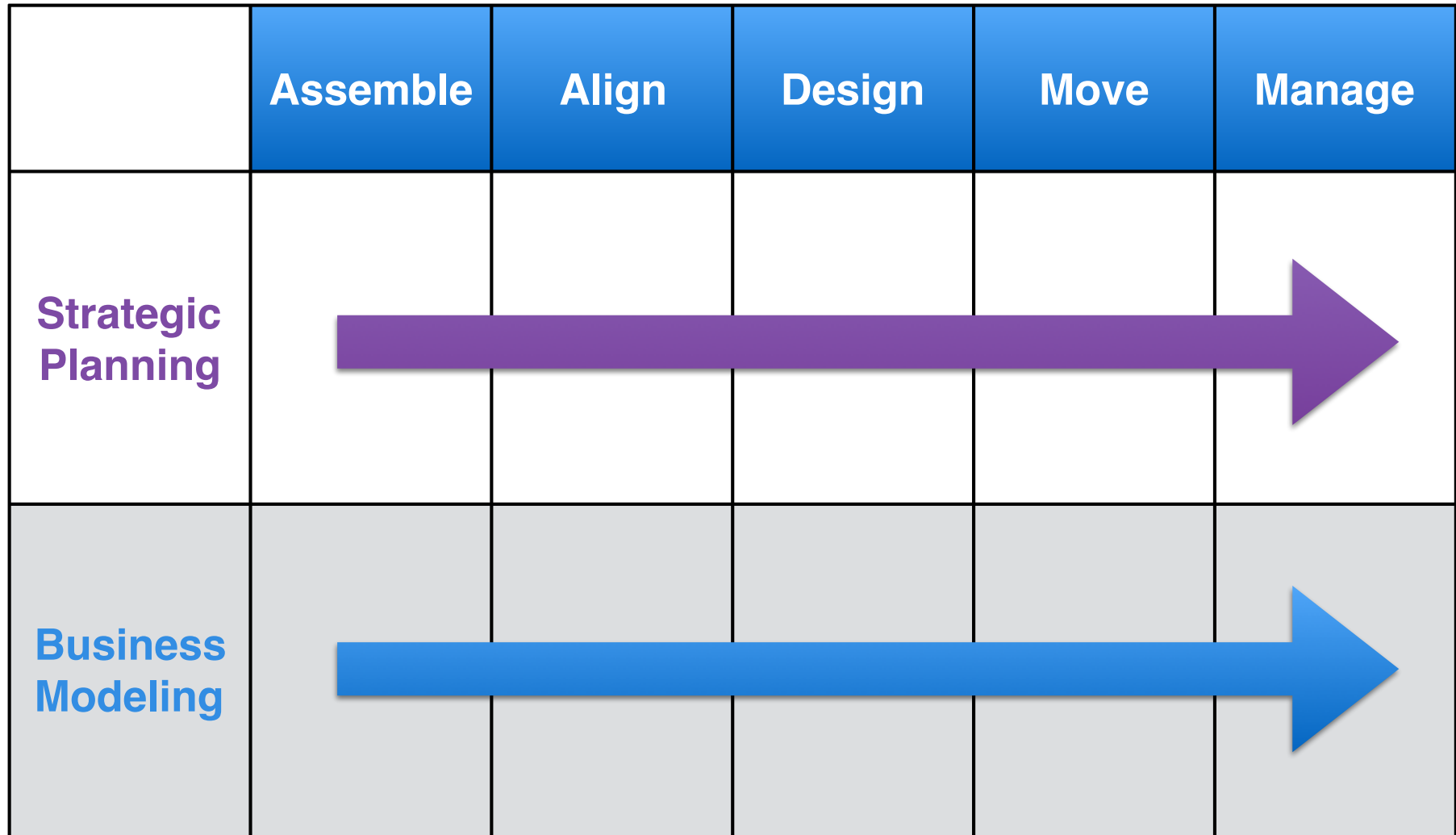


WORKSHEET

**CURTIS STRATEGY**  
UNLOCKING POTENTIAL



# STRATEGIC PLANNING vs. BUSINESS MODELING

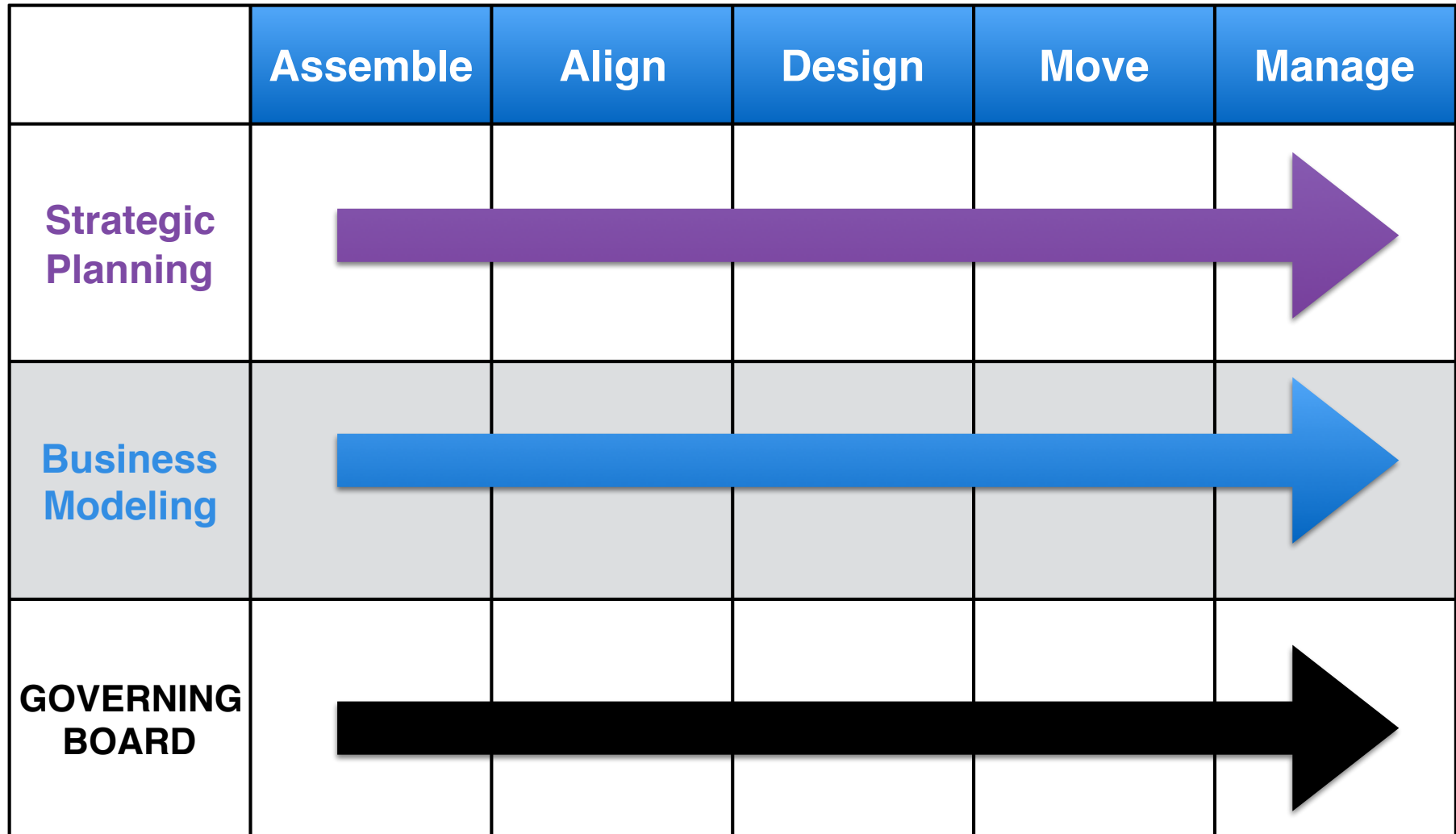


# CAN YOUR BOARD HELP?



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UNLOCKING POTENTIAL

# STRATEGIC PLANNING vs. BUSINESS MODELING





# BOARD TIME ALLOCATION

BOARD CHARACTER	TIME	CURRENT	DESIRED
Meeting Frequency (times per year)	12 - 10 - 6 - 4		
Meeting Time (avg. hours per meeting)	1 - 1.5 - 2 - 3 - 4 - 5+		
Agenda Built	<1 week 2 3 4 5+ weeks		
Agenda & Board Materials Emailed	<1 week 2 3 4 5+ weeks		
Do meetings start on-time?	Yes No		
Avg. Time on Report Outs	<5 - 10 - 15 - 20 - 30 - 45 - 60+ Minutes		
Avg. Time on Planning & Modeling	<5 - 10 - 15 - 20 - 30 - 45 - 60+ Minutes		
Avg. Time on Previous Meeting Actions	<5 - 10 - 15 - 20 - 30 - 45 - 60+ Minutes		
Avg. Time on Board Development	<5 - 10 - 15 - 20 - 30 - 45 - 60+ Minutes		
Avg. Time on Financial	<5 - 10 - 15 - 20 - 30 - 45 - 60+ Minutes		
Avg. Time on Staffing	<5 - 10 - 15 - 20 - 30 - 45 - 60+ Minutes		
Avg. Time on Fundraising	<5 - 10 - 15 - 20 - 30 - 45 - 60+ Minutes		
Avg. Time on Performance	<5 - 10 - 15 - 20 - 30 - 45 - 60+ Minutes		

Instructions: Answer how much TIME is spent in each area. Indicate the TOP 5 Areas of **Current** Focus for the board's time with a #1, #2, #3, #4, and #5. Then determine which areas the board should focus on more in the future, by indicating a #1, #2, #3, #4, and #5 in the **Desired** column.

# THE CONTEXT

for strategic planning, business modeling, and board development

