

# ACTION PLAN FRAMEWORK

## GETTING STARTED

Welcome to the Shared Value Action Plan Canvas; a tool to help you ideate and work through some of the key considerations required to implement a shared value project. There are 5 interconnected canvases that make up the canvas.

### 1 THE PROBLEM

ACTION PLAN FRAMEWORK  
PART 1: THE PROBLEM

SOCIAL ISSUE	THE PROBLEM WE'RE TRYING TO ADDRESS	LEVELS OF SHARED VALUE
Provide space for social issue being addressed.	Describe the problem to be solved. How does it relate to the business? What are the stakeholders involved? What are the business goals that need to be addressed?	Consider how each of the three levels of shared value can be created by the project: <ul style="list-style-type: none"> <li>Operational level: cost reduction &amp; efficiency improvements</li> <li>Community level: employee engagement &amp; retention</li> <li>Market level: new products, services, and business models</li> </ul>

UP NEXT Part 2: Alignment to Company Purpose and Strategy

### 2 ALIGNMENT TO COMPANY PURPOSE AND STRATEGY

ACTION PLAN FRAMEWORK  
PART 2: ALIGNMENT TO COMPANY PURPOSE AND STRATEGY

LINK TO COMPANY PURPOSE	STRATEGIC ALIGNMENT	SUSTAINABLE DEVELOPMENT GOALS						
Outline how the issue links to your organization's purpose.	Outline how the project aligns with the overall strategy of your organization.	<table border="1"> <thead> <tr> <th>GOALS</th> <th>TARGETS</th> </tr> </thead> <tbody> <tr> <td>List goals relevant to the project.</td> <td>Outline how the project is addressing the specific SDG targets associated with the goals.</td> </tr> <tr> <td></td> <td></td> </tr> </tbody> </table>	GOALS	TARGETS	List goals relevant to the project.	Outline how the project is addressing the specific SDG targets associated with the goals.		
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UP NEXT Part 3: Project Details

### 3 PROJECT DETAILS

ACTION PLAN FRAMEWORK  
PART 3: PROJECT DETAILS

WHAT ARE WE GOING TO DO?	HOW ARE WE GOING TO DO IT?	WHO DO WE NEED TO WORK WITH?	WHAT ARE OUR KEY RISKS?	IS THE IDEA SCALABLE?						
What is your high-level solution? What components will be needed to bring this to life through the project?	How is your organization going to develop capacity for this commitment? List critical resources, budget, and timeline for your project.	<table border="1"> <thead> <tr> <th>INTERNAL STAKEHOLDERS</th> <th>EXTERNAL STAKEHOLDERS</th> </tr> </thead> <tbody> <tr> <td>List internal stakeholders who are critical to the success of your project.</td> <td>List external stakeholders who are critical to the success of your project.</td> </tr> <tr> <td></td> <td></td> </tr> </tbody> </table>	INTERNAL STAKEHOLDERS	EXTERNAL STAKEHOLDERS	List internal stakeholders who are critical to the success of your project.	List external stakeholders who are critical to the success of your project.			What obstacles and barriers do you expect the project to face?	How can your business have the scale to impact?
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UP NEXT Part 4: Measurement and Assessment

### 4 MEASUREMENT AND ASSESSMENT

ACTION PLAN FRAMEWORK  
PART 4: MEASUREMENT AND ASSESSMENT

BUSINESS VALUE CREATION		SOCIAL VALUE CREATION													
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UP NEXT Part 5: Experimentation

### 5 EXPERIMENTATION

ACTION PLAN FRAMEWORK  
PART 5: EXPERIMENTATION

WHAT ARE OUR BIGGEST ASSUMPTIONS?	WHAT ARE OUR NEXT 3 EXPERIMENTS OR ACTIONS?
Outline your key assumptions that will be critical to the success of the project. What must be true in order for this solution to succeed?	Outline the next three steps, including the steps you will test to validate or invalidate the assumptions you have made.

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### **SOCIAL ISSUE**

Priority social issue impacting your business



### **THE PROBLEM WE'RE TRYING TO ADDRESS**

Background information as to how the social issue intersects with the business and why it needs to be addressed



### **LEVELS OF SHARED VALUE**

Consider how each of the three levels of shared value are relevant to this project:

1. Reconciving needs, products and customers
2. Redefining productivity in the value chain
3. Improving the local ecosystem surrounding your business environment





### LINK TO COMPANY PURPOSE

Outline how this issue links to your organisation's purpose



### STRATEGIC ALIGNMENT

Outline how this project aligns with the overall strategy of your organisation



### SUSTAINABLE DEVELOPMENT GOALS

#### GOALS

List SDGs relevant to this project

#### TARGETS

Outline how the project is addressing the specified UN targets associated with this SDG



# ACTION PLAN FRAMEWORK

## PART 3: PROJECT DETAILS

 <p><b>WHAT ARE WE GOING TO DO?</b></p> <p>What is your organisation's broad commitment to action through the project?</p>	 <p><b>HOW ARE WE GOING TO DO IT?</b></p> <p>How is your organisation going to approach delivering on that commitment?</p>	 <p><b>WHO DO WE NEED TO WORK WITH?</b></p>		 <p><b>WHAT ARE OUR KEY TIMINGS?</b></p> <p>Key milestones and timings to deliver this project</p>	 <p><b>IS THE IDEA SCALABLE?</b></p> <p>How can your business take this idea to scale?</p>
<p><b>INTERNAL STAKEHOLDERS</b></p> <p>List relevant expertise needed to activate this activity</p>			<p><b>EXTERNAL STAKEHOLDERS &amp; PARTNERS</b></p> <p>List relevant customer groups, suppliers and partners required</p>		

# ACTION PLAN FRAMEWORK

## PART 4: MEASUREMENT AND ASSESSMENT



### BUSINESS VALUE CREATION



### SOCIAL VALUE CREATION

#### BUSINESS VALUE GOALS

Specific business KPIs/goals that could be created through this project

#### BUSINESS VALUE MEASUREMENT

Projected or measured business value created/metrics through this project

#### SOCIAL VALUE GOALS

Specific social KPIs/goals that could be created through this project

#### SOCIAL VALUE MEASUREMENT

Projected or measured social value created/metrics through this project



# ACTION PLAN FRAMEWORK

## PART 5: EXPERIMENTATION



### WHAT ARE OUR RISKIEST ASSUMPTIONS?

Looking over your Action Plan, what are the critical success factors - the things that must be true in order for this initiative to succeed?



### WHAT ARE OUR NEXT 3 EXPERIMENTS OR ACTIONS?

Choose the top three items and outline the steps you can take to validate or invalidate the assumptions you have made.