



## ***How to develop a collaborative project***

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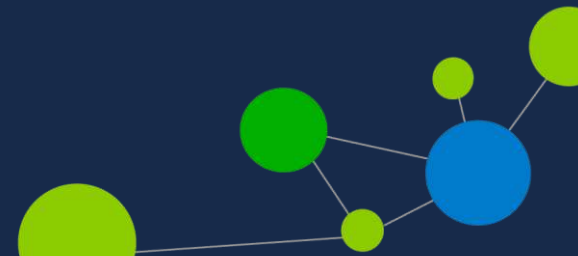
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# Intoduction

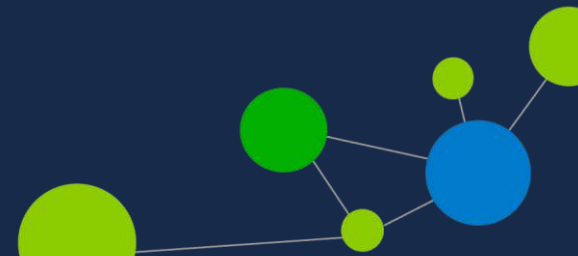
- ❖ What is a Collaborative project? It is a project where groups of people from different organisations, institutions and disciplines work together in a coordinated way to achieve common goals and objectives.
- ❖ The success of a collaborative project is due above all to the skills, involvement and motivation of each team member.
- ❖ Cooperation, innovation and productivity must be the focus of concerns.



# General methodology & steps

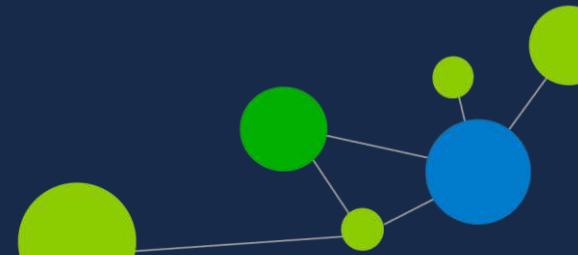
## Background Information

- ❖ The target of the coaching methodologies presented here is to provide the wood forest or bioeconomy related stakeholders essential information and tools to support the successful development and implementation of collaborative projects.
- ❖ In general, a generic innovation process model needs to be developed. Therefore, the process includes a minimum of 5 steps.

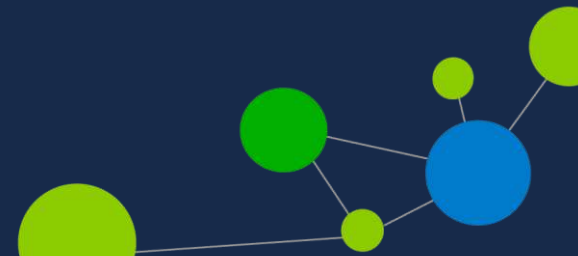


# General methodology & steps

## General steps for the development of a collaborative project



# 1. Concept & idea



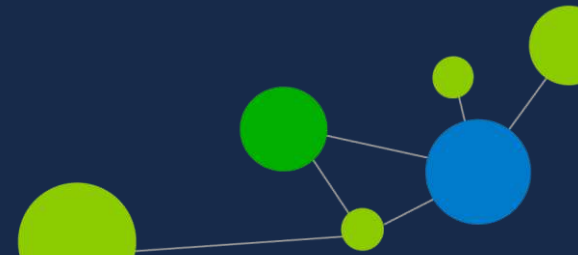
# 1. Concept & idea

- ❖ In the first step, the project initiator (e.g organization(s), a core team from different organisations) needs to define the concept & idea behind the project answering: **WHAT? WHY? HOW?**

**WHY?** Why and for what is your project important?

**HOW?** In which way do you want to reach your objective(s)?

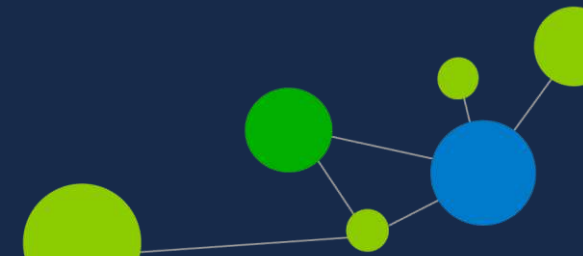
**WHAT?** Which are your main project's goals?



# 1. Concept & idea

- ❖ For a successful collaboration project, a clearly defined concept is important, also setting the proper objectives.
- ❖ The **SMART+C method**<sup>1</sup> supports the development of objectives.
- ❖ Objectives should be **S**pecific, **M**easurable, **A**chievable, **R**elevant, **T**imed and **C**hallenging.
- ❖ According to this approach, objectives serve for defining “**how much of what will be accomplished by when**”.

<sup>1</sup> The Community Tool Box, University of Kansas: <https://ctb.ku.edu/en/table-of-contents/structure/strategicplanning/create-objectives/main>

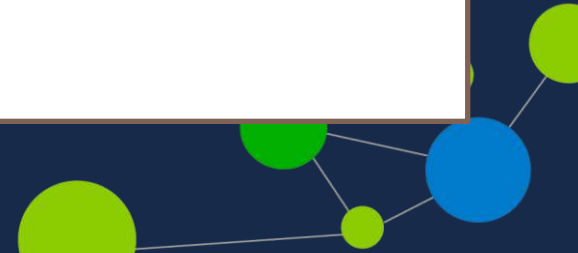




# 1. Concept & idea

## The SMART+C method

- **S**pecific objectives tell you how much of what shall be achieved by when?
- **M**easurable objectives requires the information on objectives to be collectable, detectable and obtainable.
- **A**chievable objectives describe that it is feasible to pull them off.
- **R**elevant objectives are in line with the project mission.
- **T**imed objectives are brought into a schedule indicating when they will be achieved.
- **C**hallenging objectives target at reaching significant improvements in the forest community or market.

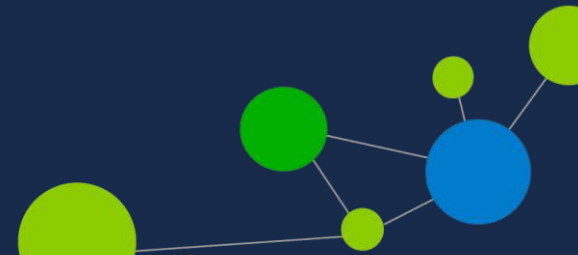


# 1. Concept & idea

- ❖ Whatever the project, do not forget that the persons evaluating it is not forcibly an expert, so apply the

KISS principle  
Keep It Simple, Stupid

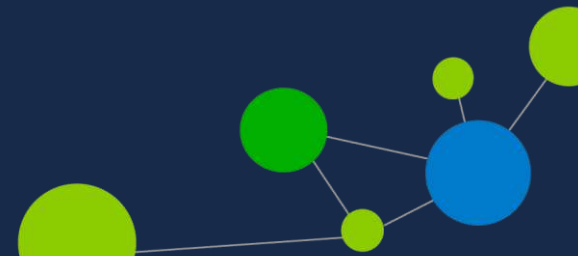
Why? Because the smarter ideas are the simplest ones. No need to complicate things. If you are able to explain it simply then it means that it is clear for you and will be for anyone



## 2. Right partners & consortium

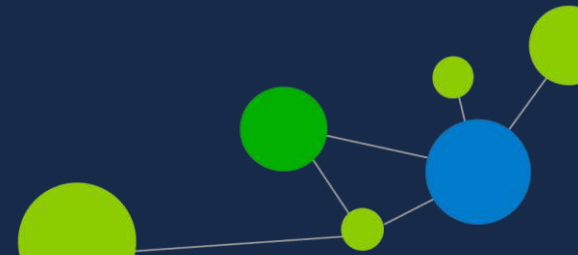


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## 2. Right partners & consortium

- ❖ **Competency matrix:** it is a tool that documents the competencies need for a successful project and shows where those competencies exist within the consortium.
- ❖ It is useful for identifying strengths and weaknesses and distributing task/talent throughout the partners to meet project's needs.
- ❖ A competency matrix template helps identify competency gaps within the consortium that should be addressed through recruiting additional partners.



## 2. Right partners & consortium

	Partner A	Partner B	Partner C	Partner D	Partner E	Partner F
Task 1	X	X				
Task 2			X		X	X
Task 3			X			
Task 4	X	X		X	X	
Task 5	X					X
Task 6						
Task 7	X	X		X		X

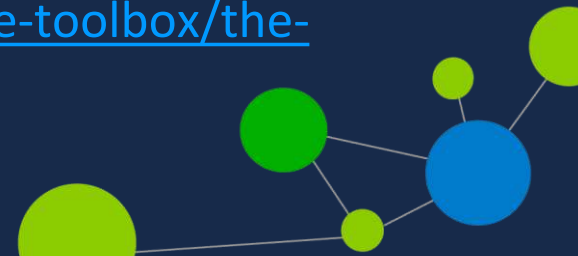
In this example, it is clear that an additional partner (or partners) needs to be added to cover task 6, as nobody in the current consortium has the competence to carry out this specific task.



## 2. Right partners & consortium

- ❖ **Value chain analysis<sup>2</sup>**: The expected project's results (e.g. new processes, new services, new products) should be brought into the value chains to exploit their full potential.
- ❖ To assess the value chain for a new service or product, the value chain analysis tool enables to get an overview of relevant aspects and players.
- ❖ The value chain analysis allows to assess value chains in five basic steps.

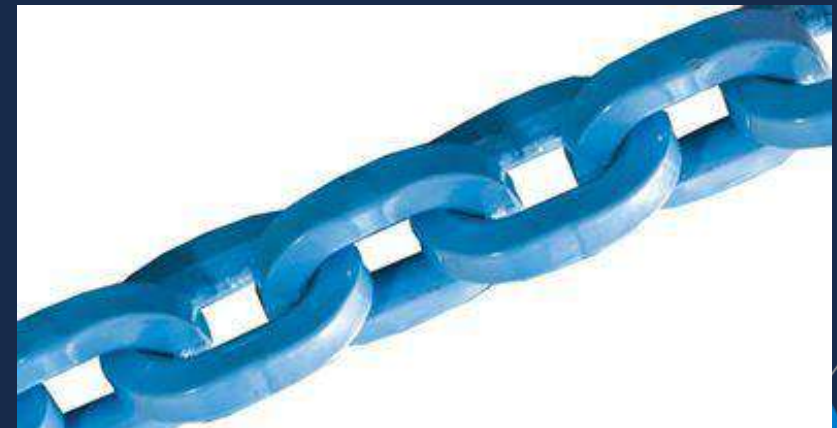
<sup>2</sup> A description of the tools is available here: <https://www.respice-sme.eu/respicesme-toolbox/the-respicesmehandbook/>



## 2. Right partners & consortium

### ❖ Value chain analysis:

1. Identify the (end)product(s)
2. Identify the key stakeholders
3. Define the Technology Readiness Levels – TRL (if applicable)
4. Assess the innovation potential
5. Develop the system model

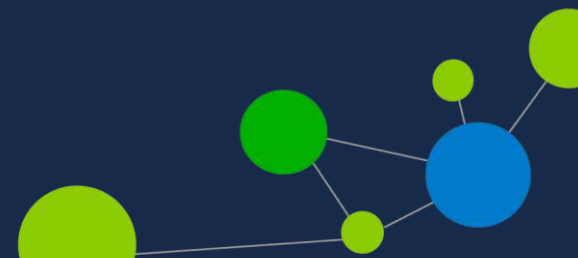


## 2. Right partners & consortium

### ❖ Value chain analysis:

#### 1. Identify the product(s)

The products can be ideas for new (advisory) services, processes or products in the forestry sector along the entire value chain, an expertise that could be turned into an (advisory service), an (existing) service or a physical product to improve and/ or extend the portfolio in the wood sector. At this stage of the value chain analysis, it must be developed a clear understanding of the characteristics and targets of the products. It shall relate to the consortium (e.g. how do they fit to their expertises) and to the market (e.g. how do the products fit in the market).





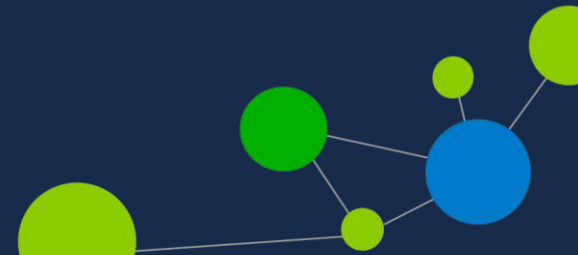
## 2. Right partners & consortium

### ❖ Value chain analysis:

#### 2. Identify the key stakeholders

Three categories of stakeholders:

- Key stakeholders contribute with knowledge, skills and/ or position of power and can thus significantly influence the project outcome. They are of crucial importance and must be consulted for a successful implementation.
- Primary stakeholders comprise stakeholders that should be on-board, but are not as important as key stakeholders.
- Secondary stakeholders can be involved on a temporary or in-direct basis, e.g. intermediaries or service organizations.



## 2. Right partners & consortium

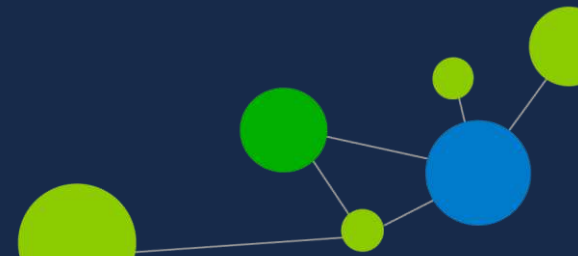
### ❖ Value chain analysis:

#### 2. Identify the key stakeholders

For identifying the most relevant stakeholders a set of five questions to facilitate this process was suggested by Graham Kenny<sup>3</sup>:

- I. Can you expect a fundamental impact on your project's performance by involving this stakeholder?
- II. What is your specific expectation from the stakeholder?
- III. Do you want the relationship with the stakeholder to grow?
- IV. Are you dependent on the stakeholder?
- V. Is there an existing relationship with the stakeholder?

<sup>3</sup> <https://hbr.org/2014/03/five-questions-to-identify-key-stakeholders>



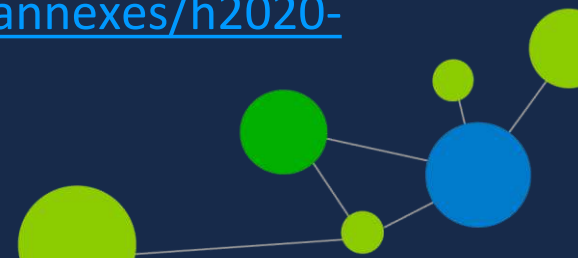
## 2. Right partners & consortium

### ❖ Value chain analysis:

#### 3. Define the Technology Readiness Levels – TRL (if applicable)

Knowing about the state and development steps for a new technology or product is essential. First of all, one must identify the steps to take. Depending on the Technology Readiness Level (TRL), different support schemes through regional, national or EU-funding are available. A definition has been provided by the European Commission<sup>4</sup>.

<sup>4</sup> [https://ec.europa.eu/research/participants/data/ref/h2020/other/wp/2018-2020/annexes/h2020-wp1820-annex-ga\\_en.pdf](https://ec.europa.eu/research/participants/data/ref/h2020/other/wp/2018-2020/annexes/h2020-wp1820-annex-ga_en.pdf)



## 2. Right partners & consortium

### ❖ Value chain analysis:

#### 3. Define the Technology Readiness Levels – TRL (if applicable)

TRL 1 – basic principles observed

TRL 2 – technology concept formulated

TRL 3 – experimental proof of concept

TRL 4 – technology validated in lab

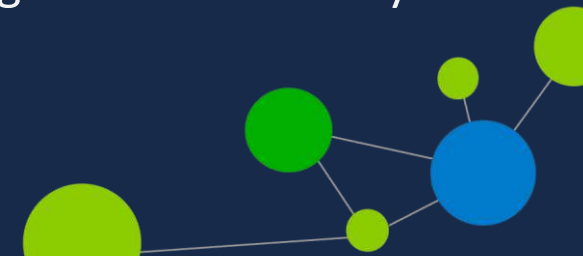
TRL 5 – technology validated in relevant environment (industrially relevant environment in the case of key enabling technologies)

TRL 6 – technology demonstrated in relevant environment (industrially relevant environment in the case of key enabling technologies)

TRL 7 – system prototype demonstration in operational environment

TRL 8 – system complete and qualified

TRL 9 – actual system proven in operational environment (competitive manufacturing in the case of key enabling technologies; or in space)



## 2. Right partners & consortium

### ❖ Value chain analysis:

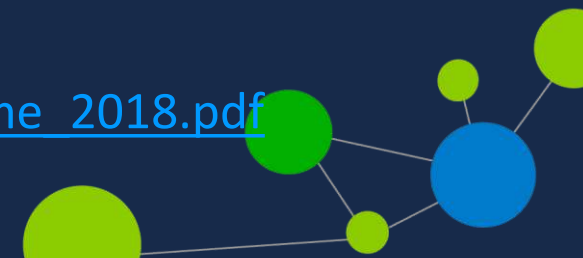
#### 4. Assess the innovation potential

The success and level of innovation in a sector depends on the most impactful path of the product. Therefore, nine levels were defined for the innovation Michaux & Link<sup>5</sup>.

The innovation potential level has to be closely questioned if it ranges from 'insufficient' (1), over 'incomplete' (2) and 'risky' (3) to 'unresourceful' (4).

Levels from 'has potential' (5) may be considered when refined and 'advanced' (6) might be successful depending on the right conditions.

5 [https://steinbeis-europa.de/files/steinbeis/dist/img/Mediathek/books\\_en/photonics\\_smes\\_respicesme\\_2018.pdf](https://steinbeis-europa.de/files/steinbeis/dist/img/Mediathek/books_en/photonics_smes_respicesme_2018.pdf)



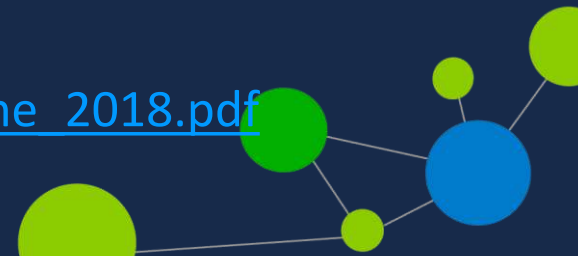
## 2. Right partners & consortium

### ❖ Value chain analysis:

#### 4. Assess the innovation potential

‘Empowering’ (7) ideas might be competitive innovations, which should be well connected to the strengths of the company for becoming successful. ‘Compelling’ (8) and ‘transformative’ (9) innovations have high potential for success or might even redefine the market. The innovation strategy should be described as appropriate as possible. A new product or process might not necessarily be completely new to the market, but may be applied for e.g. modernization, geographical modification or diversification.

5 [https://steinbeis-europa.de/files/steinbeis/dist/img/Mediathek/books\\_en/photonics\\_smes\\_respicesme\\_2018.pdf](https://steinbeis-europa.de/files/steinbeis/dist/img/Mediathek/books_en/photonics_smes_respicesme_2018.pdf)



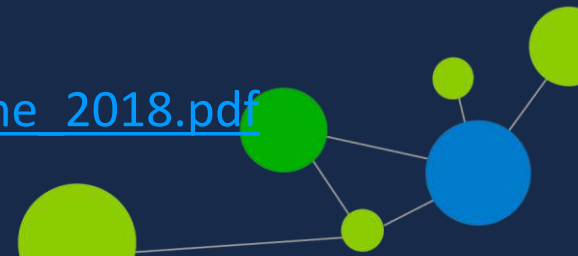
## 2. Right partners & consortium

### ❖ Value chain analysis:

#### 5. Develop the system model

For new products or services, a blueprint should be developed following e.g. the ‘**System Model**’ by Shtein & Shteyn, which is described in detail in Michaux & Link (2018)<sup>5</sup>. Such a blueprint of a system includes all relevant elements required for a scalable growth for a product concept. This concept also brings together the top ranked stakeholders for an integrated system.

5 [https://steinbeis-europa.de/files/steinbeis/dist/img/Mediathek/books\\_en/photonics\\_smes\\_respicesme\\_2018.pdf](https://steinbeis-europa.de/files/steinbeis/dist/img/Mediathek/books_en/photonics_smes_respicesme_2018.pdf)



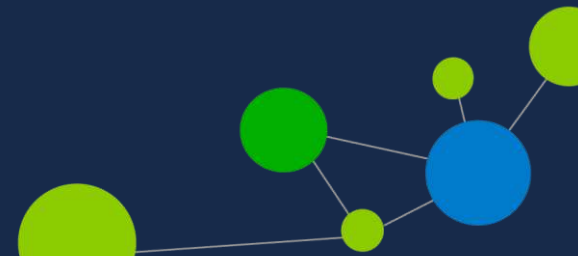
## 2. Right partners & consortium

### ❖ Value chain analysis:

#### 5. Develop the system model

For a proper system design, the following elements should be considered:

- Tools offering the key functionality of the product concept
- Source of materials, components, information or data
- Channels planned for distribution and sources delivered to the tool
- Package payloads are discrete packets of materials and information
- Organization of interaction between elements in the concept should be controlled
- The connectivity of the concept/ product to other systems and products shall be an integral part

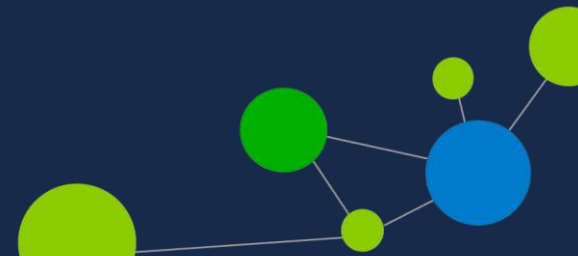




# 3. Results & economic issues

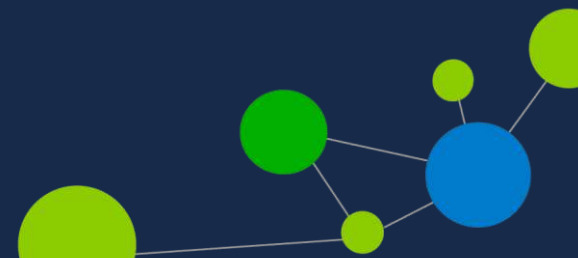


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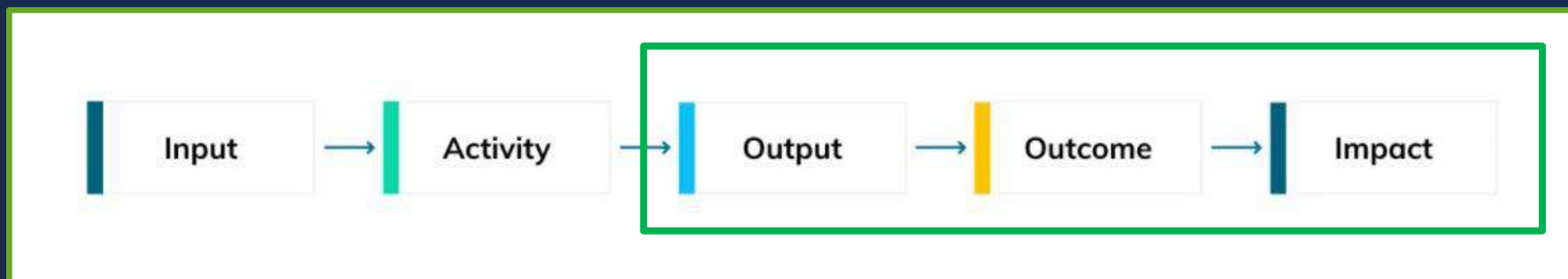
### 3. Results & economic issues

- ❖ **Added value analysis:** this tool involves analysing the project's process to identify the **value creation steps**. These are the all activities/actions that go into changing the nature or shape of a product or service to exactly what the end-users want/need.
- ❖ Once these steps have been identified, you will notice that many of these process steps are not adding value at all. The goal is to remove as many of the non-value adding steps as much as possible. By doing this, you make the process more efficient and faster.



### 3. Results & economic issues

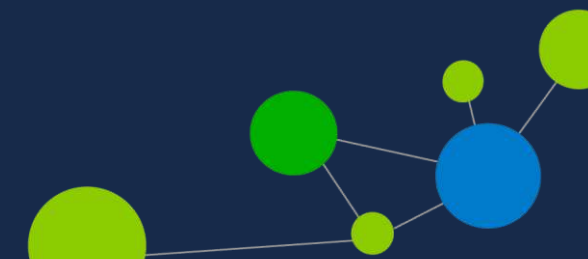
It is essential to think and define the expected **results** of the project at 3 different levels.



**Outputs:** The **direct immediate** term results associated with a project

**Outcomes:** The **medium-term** consequences after the project's end

**Impacts:** The **long-term** consequences after the project's end



### 3. Results & economic issues

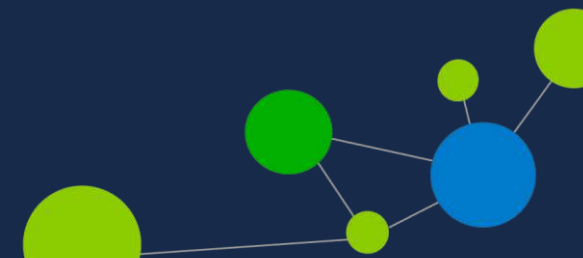
**Example:** Development of a new online trainings for stakeholders in the forestry sector



**Outputs:** The developed new online trainings (**immediate result**)

**Outcomes:** The use of the online trainings for stakeholders after the project's end (**medium-term**)

**Impacts:** The benefits (e.g. reduction of costs, management improvement, reduction of waste) for the real application of the knowledge acquired from the online trainings (**long-term consequence**)

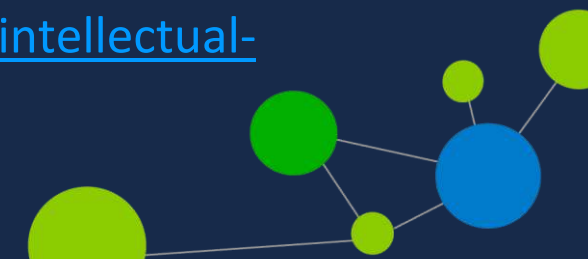


# 3. Results & economic issues

**Intellectual Property Rights (IPR):** A proper analysis of the IPR could be required prior to the project's implementation. Below there is a rough overview of types of IPR:

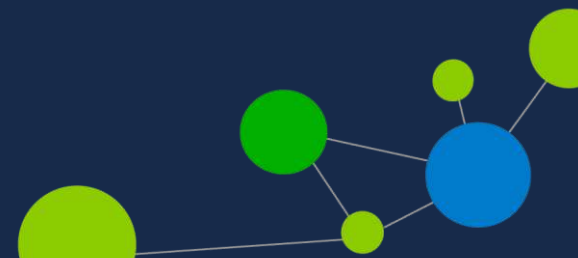
IPR	What for?	Registration?
Patent	New inventions	Registration is required
Utility model	New inventions	Registration is required
Trademarks	Distinctive signs	Registration is required
Industrial design	Appearance of products	Registration is required
Copyright	Scientific works	Not required
Confidentiality	Confidential business information/trade secrets	Not required

The European IP Helpdesk provides support free of charge: [https://intellectual-property-helpdesk.ec.europa.eu/regional-helpdesks/european-ip-helpdesk\\_en](https://intellectual-property-helpdesk.ec.europa.eu/regional-helpdesks/european-ip-helpdesk_en)



### 3. Results & economic issues

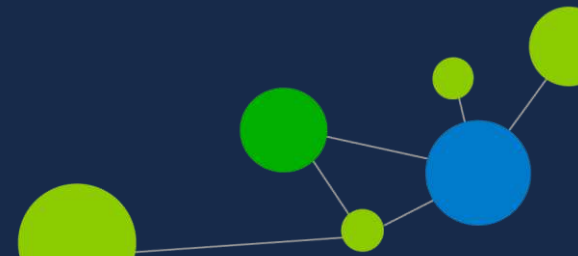
- ❖ From the IPR perspective, each of the partners must be clear about the proper role to reduce and eliminate difficulties for the implementation process.
- ❖ A legally binding document (**consortium agreement**), allows capturing the expectations for both, inputs and outputs.
- ❖ Further, the role and responsibility of each partner can be defined operationally, technically, and financially.
- ❖ In the case of IPR, the targets and exploitation rights should be defined in advance.



# 4. Market's analysis



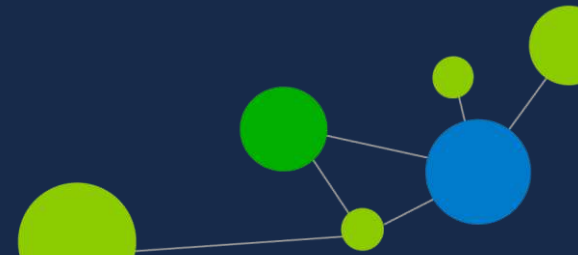
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## 4. Market's analysis

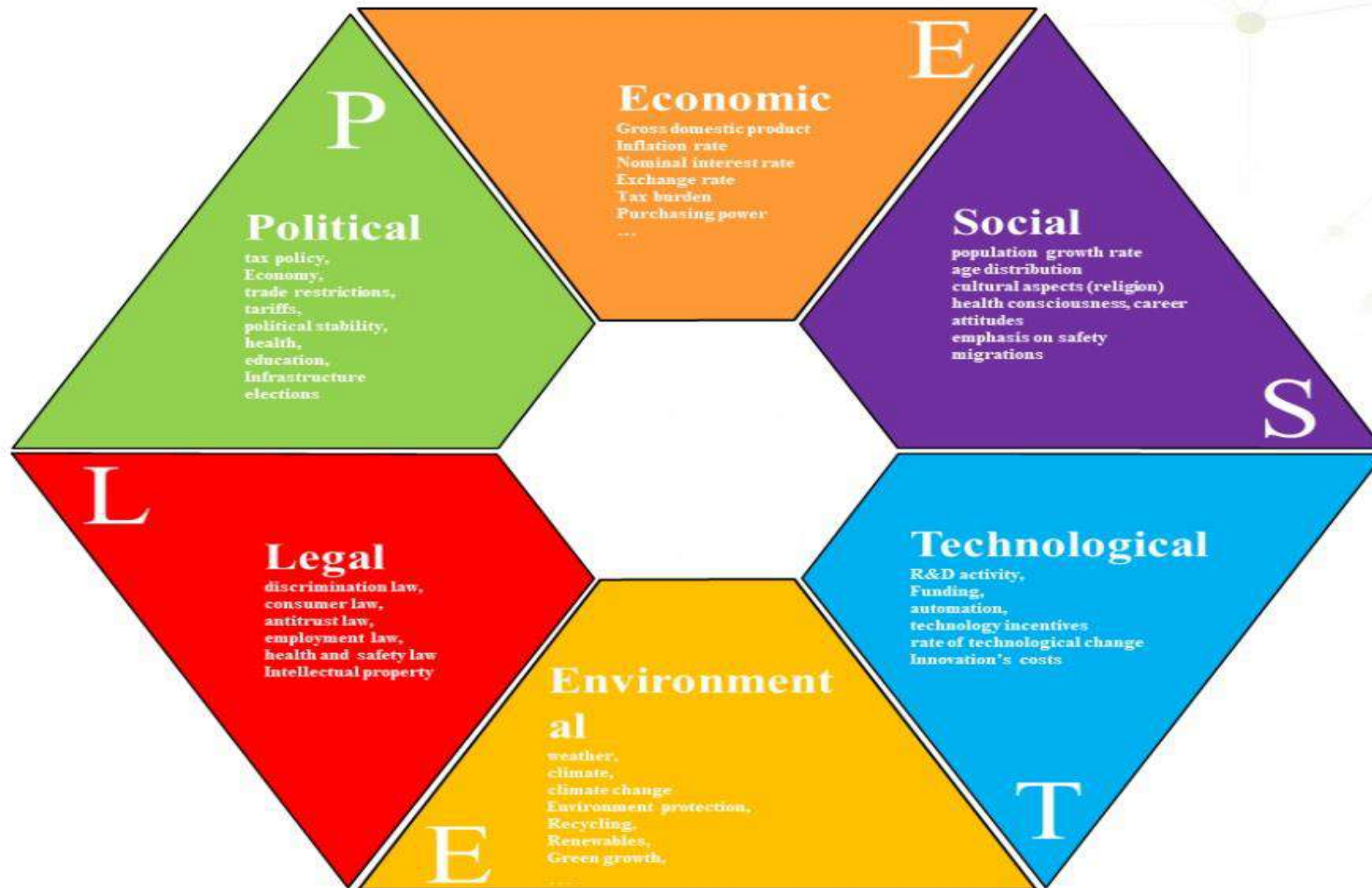
Several tools allow us to assess the market, competitors and the business side of the project.

- ❖ The **PESTEL-analysis** includes six perspectives: Political, Economic, Social, Technical, Environmental, and Legal aspects. For the forest sector, especially the political and legal frameworks are of high importance for considering the framework, regulations and financial support schemes. This analysis allows to provide a broad picture and may be used to compare different target markets in Europe as well.



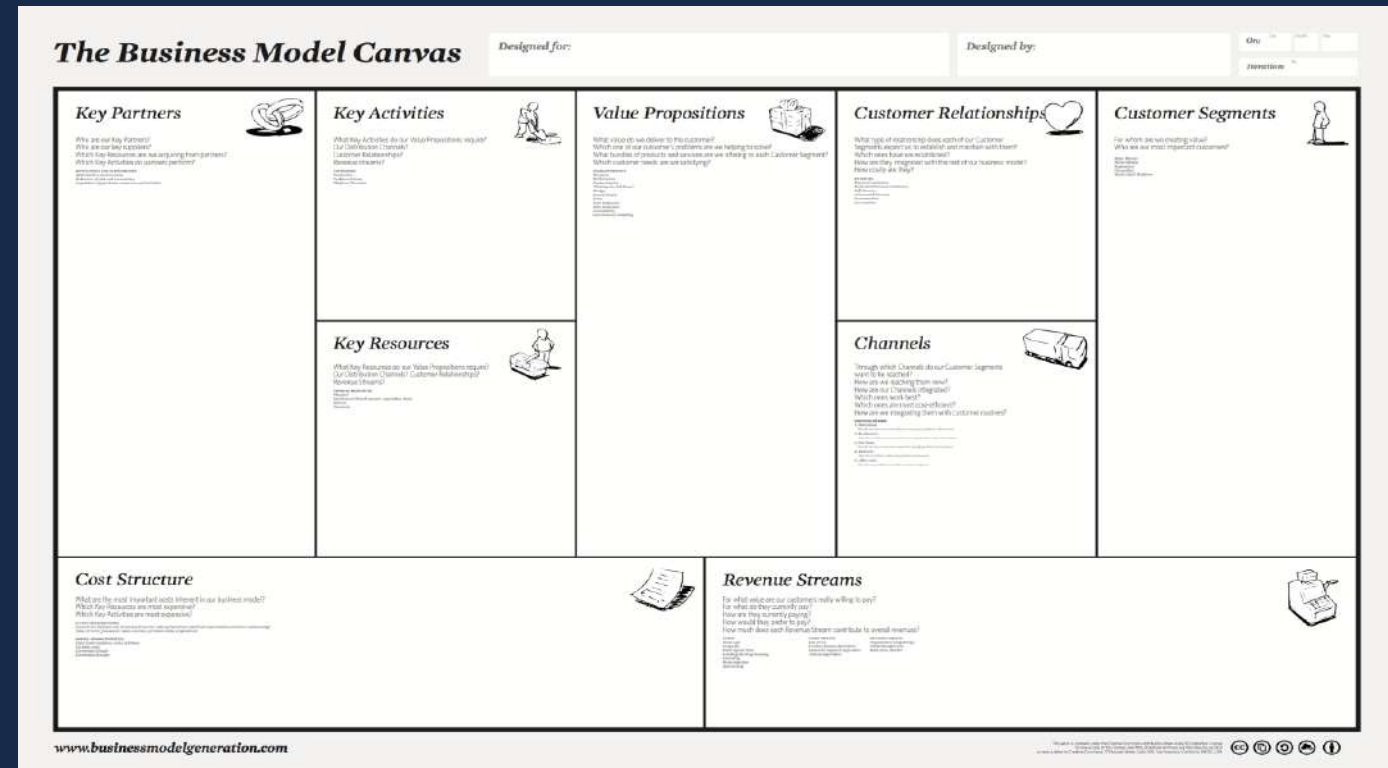


# 4. Market's analysis



# 4. Market's analysis

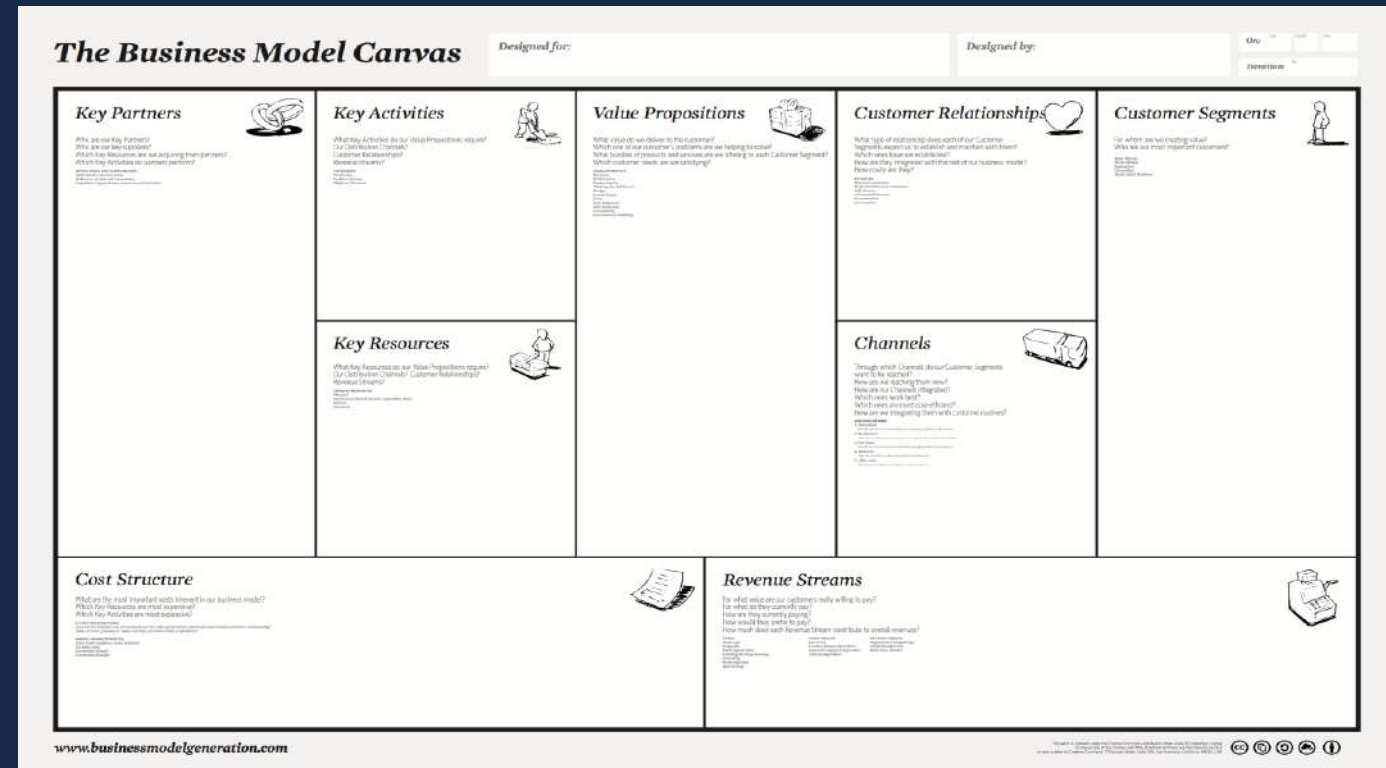
- ❖ **Business Model:** It describes the rationale of “how an organisation creates, delivers and captures value”. The key objective of a business model is to answer the question of how the project can make money with the business idea. The **Business Model Canvas** by (Osterwalder & Pigneur, 2010) is used to analyse and reflect about new and existing businesses using a template of 9 blocks.



# 4. Market's analysis

❖ The 9 blocks capture the following topics:

- Customer Segments
- Value Propositions
- Channels
- Customer Relationships
- Revenue Streams
- Key Resources
- Key Activities
- Key Partnerships
- Cost Structure



# 4. Market's analysis

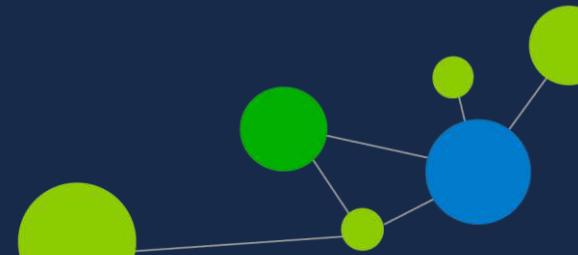
- ❖ **SWOT**: It is an acronym for **S**trengths, **W**eaknesses, **O**pportunities, and **T**hreats and is a structured planning method that evaluates those four elements of a project, an organization or business venture. A SWOT analysis is a simple, but powerful, framework for leveraging the project's strengths, improving weaknesses, minimizing threats, and taking the greatest possible advantage of opportunities.



# 5. Implementation follow-up



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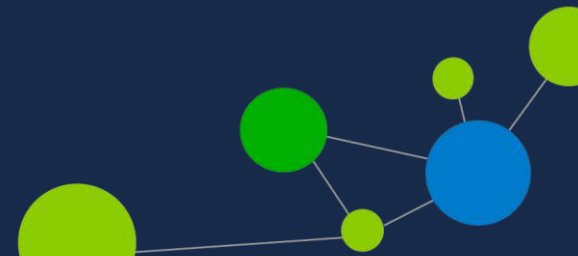
# 5. Implementation follow-up

- ❖ A **project management methodology** is a set of principles and practices that guide the coordinator in organising the project to ensure its optimum performance.
- ❖ To choose the right methodology you should consider the following factors:
  - **Cost and budget**
  - **Team size**
  - **Flexibility**
  - **Timeline**
  - **Client/stakeholder collaboration**



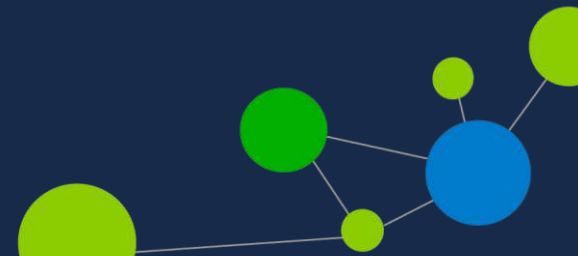
# 5. Implementation follow-up

- ❖ Examples of **project management methodologies**:
  - **Waterfall methodology** (traditional linear approach)
  - **Agile methodology** (iterative & flexibel approach)
  - **Critical path method** (for large-scale & complex projects)
- ❖ There are many **project management tools and softwares** that could help you with the coordination and implementation of the project.



# 5. Implementation follow-up

- ❖ Some key elements for the successful implementation of a **collaborative project**:
  - **Regular & continuous communication** (online meetings, physical meetings)
  - **Clearly defined roles** for all partners
  - **Trust & transparency**
  - **Engagement & dedication**, all partners are in the same boat
  - **Sharing** is important! good **project repository/sharepoint** (e.g. Teams, dropbox, nextcloud, etc.)







ROSE WOOD  
4.0 Sustainable Wood  
for Europe

 [www.rosewood-network.eu](http://www.rosewood-network.eu)



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