**EXERCISE GUIDELINES**

The following three tools intend to share and verify a possible method for identifying the potential takers who will be able/interested in reusing the key Interreg results.

**BEFORE YOU START**

The expected starting point for setting up the exercise is to identify two (or more) significant projects developed by your ETC Programme that had delivered any core output worth being capitalised on to a broader spectrum of takers.

From this perspective:

1. focus on a cluster of two or three projects that address the same theme (maybe you already carried on a clusterisation exercise in your programme, grouping two or more funded projects that belong to the same thematic area);
2. start explaining the main aims and outputs of the selected projects and verifying what takers can reuse and scale up by emphasising complementarities and synergies among the results from different projects. For example, you can consider a project that delivered an app to identify a tourist destination and a project that provided a card game to explore innovatively local destinations for residents. You can think of merging the two outputs to deliver an interactive tool for experiential tourism that can be reused and scaled up with local universities to support PhD programmes or local cultural associations to engage their members in new activities.
3. When you have focused on this "combined output", start asking yourself, "who may care?"

You should get a long list of individuals potentially interested in reusing your output.

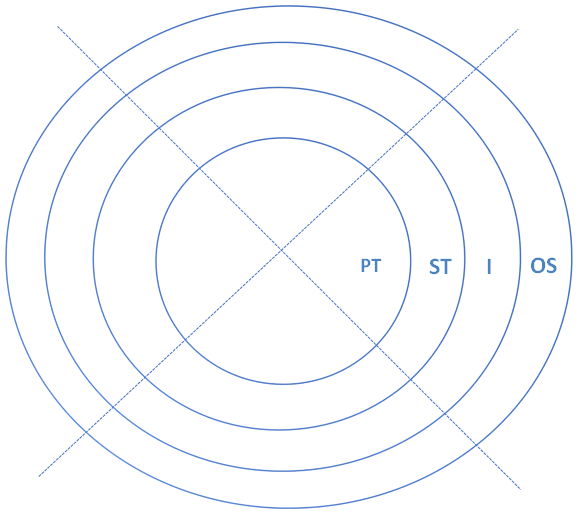
Avoiding general descriptors, like "tourism operators", is extremely important. Try to be as precise as possible and to "label" the potential re-users (e.g. B&B in rural and remote areas or the University of Bologna CAST Department, and so on).

**Tool #1 Radar**

You already know solutions to map and rank the stakeholders like the map of stakeholders. Tool #1 is something similar but has a twofold objective. First, it helps you clarify the difference between “mere stakeholders" and "takers". Second, it guides you in applying the "benefit segmentation method" to cluster the potential takers in groups with the same interests for the possible reuse of the outputs and thus address them with the same message.

Take the long list you have generated in the previous step and start with the benefit segmentation: put it together according to the type of interest they have or can have about the outputs. Focus on just four main groups/areas of interest and start combining the listed subjects in one (just in one) of the groups.

When you have the four groups, mark the quadrant in the radar with the respective label. Then go back to the four groups of listed re-users and start considering each according to promptness in reuse and the multiplier effect they can generate if they reuse your output. The higher these two dimensions, the nearer to the centre the listed re-users.



**Legend**

* **PT** = Primary takers (takers that are prompt and critical to start with if we want the capitalisation exercise to be successful)
* **ST** = Secondary takers (takers in a second tier that can be strategic but not necessary to involve for better capitalisation)
* **I** = Influencer (takers that can be interesting to lever on because they can influence TP and TS)
* **OS**= Other stakeholders (keep them informed)

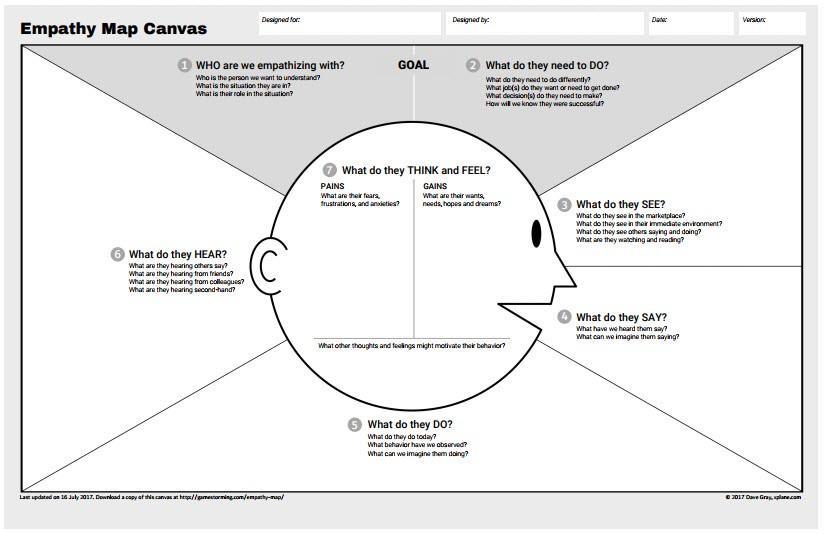
Tool # 1 - Radar

**Tool #2 Empathy Map**

**The aim of Tool # 2 is** to profile the single taker with the support of the empathy map. It is a general reference used to inspire the aspects you need to consider if you want to put yourself in the shoes of the takers and address them with the right message to engage them in the capitalisation process actively.

To test the tool, pick two of the primary and two of the secondary takers you have on the radar. To have a better result, consider all four quadrants in the radar. Then start with the identikit of each taker: What do takers need to satisfy? What do takers usually do? Which is the role of the takers? What do takers analyse? In which activities taker is involved? What do takers say (on the website, in an interview, in the survey, etc.) about their strategies and activities?

In this first stage, the empathy map drives your focus. Do not be too analytical: be aware that you need to explore different components of the profile of takers to create empathy with them, and you need complete empathy if you want them to perceive capitalisation as a win-win game.



Tool # 2 – Empathy Map

Once you complete the picture, you have the ground and all the preliminary information to fill in the table. Please, include in the table the full name of each taker you will consider and remember to be specific (i.e., University of Torino= right; University=wrong). This exercise should help you start with particular (you moved from analytical details for each taker) and end with some hints of common traits among the different takers, which will be helpful to generate scope and scale economies in your capitalisation strategy.

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
|  | Which interest do they have? | Which output(s) could interest them? | What ability do they have to capitalise? | What could they be interested in capitalising on results? |
| PT |  |  |  |  |
|  |  |  |  |  |
|  |  |  |  |  |
| ST |  |  |  |  |
|  |  |  |  |  |
|  |  |  |  |  |

**Tool #3 The engagement mix**

**The engagement mix has the main aim of highlighting that there is no *one-size-fits-all***approach that makes sense if we want to engage the takers. We need to explore which is the best suitable solution and which is the right timing and the proper mix for the capitalisation activities.

The main questions of the Tool #3 are: How do we involve the takers? Which tools are helpful for a better involvement of takers? How long is the time to include takers looking at the several tools available? The starting point is to identify which programme instruments best fit the takers identified: capitalisation call, conference, survey, partnership, takers involved as an expert, etc. For each tool selected, please add the timing for implementing it correctly and identify potential use the taker could make of the instrument. This exercise can also help us as a community to create a shared calendar or identify joint events and solutions to address takers at the national level.

|  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- |
| **Tools** | **Taker 1 (name)** | | **Taker 2 (name)** | | **Taker 3 (name)** | | |
| When? | How can we use this tool? | When? | How can we use this tool? | When? | How can we use this tool? |
| Capitalisation Calls |  |  |  |  |  |  |
| Conferences, peer review, workshop, etc. |  |  |  |  |  |  |
| Dedicated Surveys |  |  |  |  |  |  |
| Takers involved as partners |  |  |  |  |  |  |
| Output library |  |  |  |  |  |  |
| Takers involved as experts or mentor |  |  |  |  |  |  |
| Other |  |  |  |  |  |  |