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From idea to project

Worksheets for Students, PhD Students and Staff of Jagiellonian University

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About the worksheets

The **From Idea to Project** worksheets are a tool designed to help you organise your idea and guide you step by step through the key elements needed to develop it further. Their aim is to support you in moving from a general idea towards a more concrete and well-thought-out project concept.

Thanks to these worksheets, you can explore your idea from different perspectives, gain a better understanding of its underlying assumptions and prepare for the next stages of work, such as refining your business model or creating a project presentation.

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The worksheets also include additional materials that may prove useful at later stages of your work. These include practical tools, knowledge resources, contacts for organisations and institutions that support project development, as well as materials to help you better assess your skills, strengths and personal attributes. In this way, the worksheets can become a practical resource to support you in bringing your idea to life.

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Business Model

What is a business model?

Business model is the way in which your idea works in practice and generates revenue.
It shows how the various elements of the project fit together and answer the most important questions.



- Who are you creating this solution for?
- What problem are you solving?
- How do you deliver value to the customer?
- How do you make money from it?

You can think of a business model as a map of your project – it helps you organize your idea and see whether all its elements fit together.

Our worksheets are based on the Business Model Canvas

What's Business Model Canvas?

Business Model Canvas, it's a tool that allows you to present a business model in a simple and clear way – on single page.

Instead of a long description, you break your idea into 9 parts, which together, show:

- What do you offer?
- Who do you offer it to?
- How do you reach customers?
- How do you make money ?
- What do you need to make it work?

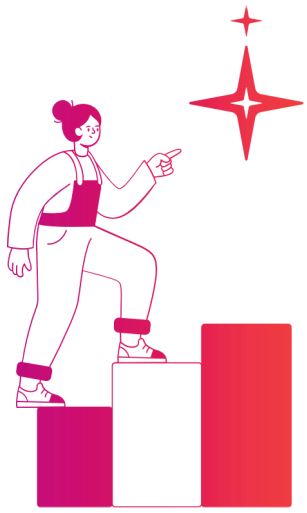
This makes it easier to understand the project, spot any gaps, inconsistencies and develop and refine your idea.

You don't have to know all the answers strait away. The business model evolves alongside the project and may change. It is a way of testing different approaches to running the project "on paper"

Value proposition

Value propositions are the answer to the questions:
Why should a customer choose your solution particular?

In this part think about:



- What value exactly do you want to offer to a customer?
- What problem are you solving?
- What makes your offer useful and attractive?

The value proposition should be understandable for a person, who hear about your project for the first time

What value do you want to offer your customers?

Think about:

- What will customer gain thanks to Your solution?
- Does it save time, money or effort?
- Does it improve comfort, safety or quality of life?

Your value proposition:

What problem are You solving?

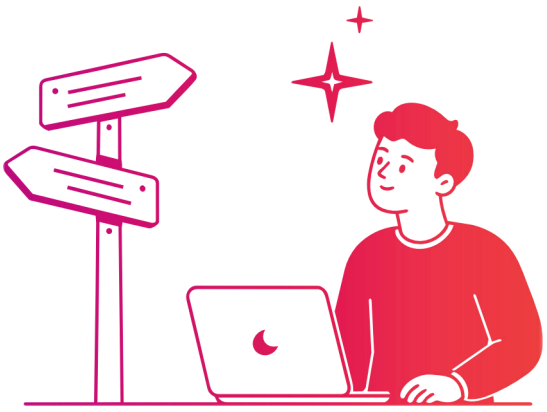
Think about:

- What is currently difficult and inconvenient for the customer?
- What takes them a lot of time or money?
- How is the customer dealing with this problem at the moment?

Customer's problem description:

Segmenty klientów

Customer segments define who you are creating your product or service for. In this section it is important to **identify specific target groups.**



Remember!
Different customers can have different needs – not everyone is equally important in the early stages of a project.

Who is your customer?

Think about:

- Who uses your solution?
- Are they private individuals, companies, organisations?
- What are their habits and interests?

Client's profile:

Relations with customers

Relations with customers determine how you built and maintain a relationship with them. It's not just about sales, but also:

- Way of communicating with clients,
- Level of customer's support
- Customer experience



Remember!
Even the best product won't sell
if customer doesn't know where to find it.

Of all of the customers, which groups are the most important?

Not every client is equally important at the outset.
Think about:

- Who needs your solution the most?
- Who will pay for it fast and with little thinking?
- With which group You should start?

1. _____
2. _____
3. _____

Is your client paying or is there someone else who pays for them?

Sometimes user = payer
Examples:

- A child uses it but it's parents who pay
- An employee uses it, but the company pays
- The user have free access, but the advertiser pays

Who is your user?

_____

Who pays for it?

_____

What kind of relations your Customers expect?

Think about:

- Does the customer prefer human contact or automation?
- Does customer needs advice or simple solution sufficient?
- Is it a one-off relationship or a long-term one?

Customer profile:

How do You build relationships with clients?

Think about:

- How will the client find You?
- How does the relationship start?
- What do You need to do to attract them?

Examples: social media, website, events, recommendations

How do You build relations with clients?

Distribiution channels

Distribution channels determine how you reach customers and deliver you value

This covers the entire process:

From the initial contact → through the purchase → to the delivery of the product/service

Remember!
Choose channels based on your customers' habits. Where do they look for information, where do they make purchases, and how do they want to receive the product or service? These stages may take place in different places – make sure the transition between them is seamless

Where our customers tend to go?

Think about:

- Where do your clients spend their time?
- Where do they get informations from?
- Which platforms do They use?

Examples: Instagram, TikTok, LinkedIn, events, universities, fairs, online shops, forums, theme groups.

Where are Your clients?

What habits does your user have?

Think about:

- How do customers buy similar products?
- Do they prefer online or offline?
- Do they compare offers or do they buy quickly?

Customer behaviour:



Which channels do we use to establish contact with specifically defines customer segments (groups)?

Here match the channels to the specific customer groups listed on page 11

Segment 1:

Channels:

Segment 2:

Channels:

Segment 3:

Channels:

How do You deliver to customers?

Think about:

- How does a customer receive your product or service?
- Is it a physical delivery, an online platform, an app?

Method of delivery:

Which of our activities lead to closer ties with our customers?

It's all about building relationships and commitment
Examples: newsletter, social media, community, loyalty program

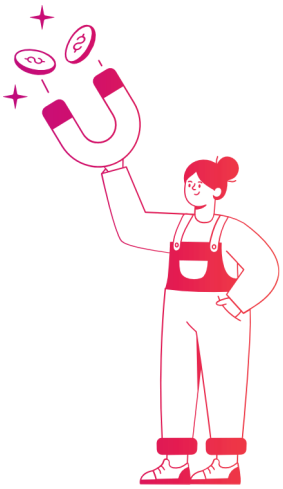
Integration activities:

Revenue streams

Revenue streams determine how your project makes money

These are the answers to the questions:

- Who pays?
- What are they paying for?
- How much do they pay?



Remember!
You can have more than one source of income.

What customers are willing to pay for?

List all the ways of earning money.

Think about:

- Where does a customer see real value?
- What is important enough to them that they are willing to pay for it
- Are they paying for a product, a service, access or convenience?

What do the customers pay for?

How much is a customer willing to pay?

Think about:

- How much do similar solutions cost?
- Is your product/service cheaper, more expensive or premium?
- Will customer pay once or is the payment subsribtion based?

Price/price range

Which parts of our product/service are free, and which are paid for?

Think about:

- Do you have the free version?
- What's free and what you have to pay for?
- Do you offer a free trial?

Paid:

Free:

How do the customers make payments?

Think about:

- How does the purchasing process look like?
- What forms of payment do you offer?

Examples: Examples: bank transfer, card, subscription, online payment

Price/price range

What are the various sources of revenue?

Think about:

- Do you have more than one source of income?
- Can you expand it in the future?

Examples: Examples: bank transfer, card, subscription, online payment

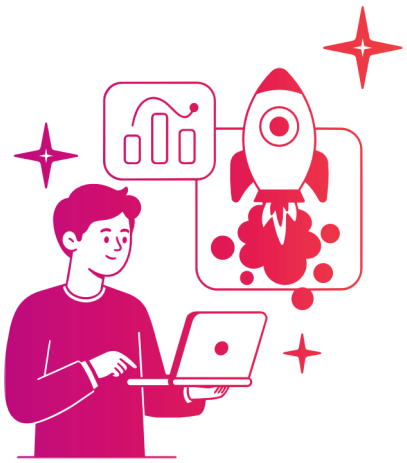
Source of income:

Key actions

These are the most important activities in your project

Key actions are everything you need to do in order to:

- Create a product/ service
- Deliver value to the customer
- Make money



Remember!
Don't write everything down.
Focus on what's really important.

What steps do we need to take to prepare the product/service?

Think about:

- What do you need to do to put together an offer?
- What does the process of creating a product or service involve?
- Do you need to carry out research, design or production?

Activities relating to the preparation of a product or service:



To build a relationship with your customers, consider what actions your distribution channels and customer outreach channels require?

Think about:

- What do you need to do to reach customers?
- What marketing activities are required?
- What do you need to do to maintain relationships?

Marketing and sales activities:

What are the key actions and activities that let us generate revenue from the value we deliver to the customer?

Think about:

- What leads directly to sales?
- What generates revenue?
- What actions are key to making money?

Revenue-generating activities:

Key resources

Key resources are everything you need to own or have access to in order to:

- Create a product or service
- Reach customers
- Keep the project running

These could be resources like:

- Physical (equipment, materials),
- Human (skills, team),
- Financial (budget),
- Intellectual (know-how, brand, technology)

Remember!
Focus on what the project cannot function without.

What resources do we need to prepare our service/product?

Think about:

- What does it take to create a product?
- Do you need technology, equipment or knowledge?
- Are certain skills required?

Resources required to create a product or service:



What resources do our customer outreach channels require to establish and maintain relationships with customers?

Think about:

- Do you need marketing tools?
- Do you need customer service?
- Do you use any platforms, systems or media?

Resources for communication and customer relations:

What resources will we utilise to provide our products and services to customers?

Think about:

- How does the delivery of the product/service work?
- Is logistics, a platform or infrastructure required?

Resources required to deliver the product/service:

What resources do we need to maintain our financial liquidity?

Think about:

- What capital is required to start you project?
- Do you need external funding?
- How long can you operate without generating revenue?

Financial resources:

Key partners

Key partners are the organisations that support your business's operations

These may include:

- Suppliers
- Technology partners
- Institutions
- Colleagues
- Companies that carry out some of your tasks on your behalf



Remember!
You don't have to do everything on your own – partnerships usually accelerated development

Who is our key business partner and a supplier essential to the running of the company?

The partners specifically named in connection with their activities.

Think about:

- Who provides the key resources?
- Who helps with production or service delivery?
- Who enables us to reach customers?

Key partners:

What key resources and activities do our partners provide for us?

Think about:

- What does your partner do for you?
- What value do they bring to the project?
- How much do you rely on them?

The role of partners:

Are we relying on them too much? Can we change them if necessary?

Think about:

- Do you have any alternatives?
- What will happen if your partner suddenly stops cooperating?
- Can you find a replacement quickly?

The risk of dependence on partners:

Cost structure

The cost structure shows how much it costs to run your project. It answers the question:

What expenses do you need to cover to set up and run your business?



Remember!
Costs aren't just about production – they also include marketing, staff, tools and operations.

What are your expenses?

List them all, along with their estimated amounts.

Think about:

- What are your fixed costs (e.g. rent, subscriptions)?
- What are your variable costs (e.g. production, materials)?
- How much are they per month/per occurrence?

Your expenses:

Cost item	Estimate

What are the main costs associated with the product or service?

These are costs without which the project will not be able to be started.

Think about:

- What is absolutely necesary to get started?
- What is the project absolutely unable to function without?

Key begining costs:

What financial outlays do the following generate: key resources, key activities, and relationships with customers and partners?

Try to combine the previous elements of the model:

- **Resources** – what does it cost?
- **Activities** – how much does it cost to carry them out?
- **Relations** – marketing, customer service
- **Partners** – commissions, outsourcing

Costs associated with:

resources:

activities:

Customer relation:

Partnerships:

Business Model summary

Complete this section once you have gone through all the elements of the business model. This is your summary of the project – very useful, for example, for a pitch deck.

Value proposition

We help (who?)

solve a problem (what problem?)

by (your solution)

Customer segments

Our main customer is

who needs

Customer relations

We build relations by

offering

Distribiution channels

We reach customers through

we sell through

we deliver through

Revenue streams

We earn through

where the customer pays for

Top 3 key activities

1.

2.

3.

Top 3 key resources

1.

2.

3.

Key partners

We work with

who helps us

Most important costs

1.

2.

3.

If someone can read just the summary and understand your project, then you've got a well-structured business model

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Pitch deck

What is an investor presentation?

A pitch deck is a short, well-structured presentation that sets out the key information about an idea, a project or a start-up. Its aim is to capture the audience's interest and convince them that the project is worth their attention, time, support or money.

A pitch deck is usually prepared with the following in mind:

- investors
- partners
- mentors
- competition's Jury
- potential clients or business partners.

A pitch deck is not a full business plan. It is not intended to describe everything in great detail. Rather, it is designed to answer a few key questions in a simple and clear way:



- What problem have you identified?
- partners
- mentors
- competition's Jury
- potential clients or business partners.

A good investor presentation should be:

- **brief** – containing only the most important information,
- **easy to understand** – even for people outside the industry,
- **concrete** – based on facts, not just general slogans,
- **persuasive** – demonstrating why the project is worthwhile,
- **coherent** – all slides should tell a single story

A pitch deck helps to organise your idea. Even if the project is at a very early stage, preparing such a presentation allows you to see more clearly:

- what is already known,
- what is still missing,
- what the project's strengths are,
- and where risks or questions arise.

To put it simply, a pitch deck is a project's calling card in the form of a presentation. It is designed to demonstrate that the idea is underpinned by a specific need, a well-thought-out solution, and a person or team who know what they want to achieve.

Why do people create pitch decks?

A pitch deck helps you:

- organise your idea,
- identify the problem and the solution,
- demonstrate the value of your project,
- prepare for a meeting with an investor, partner or panel,
- practise speaking clearly and convincingly about your project.

What does a pitch deck usually contain?

The following elements most commonly feature in an investor presentation:

- organise your idea,
- identify the problem and the solution,
- demonstrate the value of your project,
- prepare for a meeting with an investor, partner or panel,
- practise speaking clearly and convincingly about your project.
- demonstrate the value of your project,
- prepare for a meeting with an investor, partner or panel,
- practise speaking clearly and convincingly about your project.

A pitch deck is a way of presenting a project so that the audience quickly understands what you're doing, for whom, why, and why they should trust you.

The exercises in this section will help you, step by step, to gather the most important information about your project and turn it into the basis for a good presentation. Thanks to them, you'll find it easier to define the problem, refine the solution and choose what's really worth including in your pitch deck. This stage allows you to organise your idea and prepare to present it in a clear, concrete and persuasive manner.



A few words about the project

Try to describe your project in a single sentence, so that someone hearing about it for the first time would understand:

- what you do,
- for whom,
- what problem you solve?

Example: ; we help (who?) to solve a problem (what?) by means of (a solution).

Your sentence:

Problem/ Market need

Describe the specific problem you want to solve.
Guiding questions:

- What problem is the user facing?
- Who is affected?
- How often does it occur?
- Why is it important?

Hint: Try using figures or data (e.g. statistics).

The problem in 3 points:

1.

2.

3.

Why is that important?

Solution

Describe exactly what you're doing, as simply as possible.

Remember: if someone doesn't understand a solution after just one sentence, you need to simplify it.

Name of the solution:

How it works (max 3 points):

1.

2.

3.

Product / service

Think about:

- key features
- competitive advantages
- technology / how it works
- benefits for the user

Key features:

1.

2.

3.

Why would a user choose this particular solution?

Market

Show how big the market is for your idea.

Useful Terms:

- **TAM** – the total addressable market
- **SAM** – the part of the market you can reach
- **SOM** – the realistic share of the market you can capture.

Your market:

TAM

SAM

SOM

Competition

Guiding questions:

- Who offers similar solutions?
- What are their strengths?
- How does your project stand out?

3 main competitors:

1.

2.

3.

Our advantage:

Business model

Answer this one key question:
How will the project make money?

Think about:

- who pays,
- what do they pay for,
- how do you reach your customers?

Your business model:

Client:

What he pays for:

Sales channels:

Team

Investors invest in people

Describe:

- **who is on the team**
- **what skills they have**
- **what skills are missing?**

Your team:

Where are you at the moment?

Show us the progress of the project.

This could include:

- **a prototype**
- **research**
- **initial drafts**
- **first clients**

Project status:

What do you need?

The final slide of the pitch deck answers the question:

What do you need from an investor or partner?

This could be:

- funding
- business partners
- market access
- technological support

We need:

What are the funds are allocated for:

Contact

Remember to include the following information at the end:

- first names and surnames of all team members
- a contact email address (ideally set up specifically for the project)
- the contact person's telephone number
- the project's website (this could also be a social media profile)

A quick test for a good pitch deck

- Is the problem clear?
- Can the solution be explained in a single sentence?
- Is the market clearly outlined?
- Is it clear how the project generates revenue?
- Does the team have the necessary expertise?
- Are you clearly stating what you need?

**If you can answer YES to all the questions,
your pitch deck is ready!**

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Additional resources

Useful tools

In this section, we'll show you some useful tools (both paid and free) that can help with your project work.

- **Notion** – A tool for organising your work. You can use it to create databases, schedules, checklists, notes, project roadmaps and shared team spaces.
- **Miro** – an interactive online whiteboard for brainstorming, mind mapping, process planning, design thinking and live teamwork.
- **Trello** – A simple tool for managing the Kanban board method.
- **Asana** – A tool for advanced project management
- **Loop** – A modern space for collaborating on projects, documents, plans and notes in real time.
- **Canva** – Easily design presentations, posters, social media graphics, reports and promotional materials.
- **Forest** – An app that helps you limit your phone use and improve your concentration.

Useful tests

In this section, we'll show you tests covering competencies, strengths and personality. These will help you identify areas where it might be useful to develop your skills.

- **Enneagram** – The 9 Personality Types Model. It helps to understand motivations and patterns of behaviour.
- **Career Explorer** – It assesses professional suitability, working style and potential career paths.
- **Fris** – A tool for assessing styles of thinking and behaviour. Highly regarded in business and education.
- **16 Personalities** – The test reveals your personality type, working style, communication style and decision-making style.
- **123 test** – Test on potential career paths.

Useful contacts

In this section, we will introduce a selection of organisations and institutions that can support you in bringing your business ideas to fruition.

- **Polish Agency for Development and Entrepreneurship (PARP)** – training (webinars, e-learning), articles useful for (prospective) entrepreneurs, information on funding opportunities.
- **Kraków Miastem Startupów Foundation** – support in the form of training courses, incubation programmes and neo-work events.
- **The City of Kraków's Business Support Centre (POP UMK)** – individual consultations with a tax adviser, a solicitor, the Social Insurance Institution (ZUS) and a patent attorney, as well as information on setting up a business.
- **Ombudsman for Small and Medium-sized Enterprises** – educational resources for entrepreneurs, intervention support, and assistance in dealing with public authorities.

Useful websites

In this section, we'll show you websites such as grant search engines, accelerator programmes and information portals on running a project or a start-up.

- **Business Idea Center** – knowledge base, guides, training courses
- **ngo.pl** – grant search engine, knowledge base, guides
- **granty.pl** – grant search engine
- **European funds** – grants, guide, advice
- **grantowo.pl** – grant search engine, knowledge base
- **PARP** – knowledge base, guides, training courses
- **Startup Poland** – knowledge base, reports
- **My Company Poland** – knowledge base
- **National Centre for Science** – knowledge base, guides

Conclusion

Now put your idea to the test.

You now have a description of the key elements of your business. Some of the answers are based on knowledge, whilst others are still merely assumptions. Choose one assumption on which the success of your idea most depends, and plan how you will test it.

What should I check first?

How do I check this, and how will I know if my assumption is correct?

My first step and deadline:



Rough drafts:

