



Advisory Model

GENERAL SCENARIO



Title: Advisory Model General Scenario

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Advisory Model General Scenario

This document is a result of the Cirtainno Project, it includes a general model for providing advisory services in Circular Economy as well as 3 specific scenario models to develop advisory within the topics of Energy, Branding (Marketing) and Business models.

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General Model for Advisory Services in CE

1. Inspiration and pre-knowledge about CE

Introduction to Circular Economy

Inspire and open up
for potential development areas

2. Initial advisory services - Understanding the SME

Mapping the flows

Benchmark in relation to CE

Focus and engagement

3. Deepening advisory Services

Hackathon

Matchmaking

Focused (Expert)
Advising

Group Advising
Experience
sharing

4. Follow up and support

5. Documentation

LEAD PARTNER

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Advisory Service Model on Circular Economy

1. Preparation and pre-knowledge in Circular Economy (CE)

Ensure that the company has some understanding about circular economy. This can be done through introducing the concepts and principles of circular economy as well as providing examples in different application areas (such as energy, business model, waste management etc)

1.1. Introduction to Circular Economy

There are many materials available to provide an introduction to circular economy and potential areas of application, for example the materials developed in the Cirtoinno project <http://cirtoinno.eu/know-how/learning-materials/>.

Help the company to find a mind set of long term planning, as it can be overwhelming to think about the many possible areas of intervention at once. We usually say “map big, start smart.” As a way to keep the complexity and providing a sense of possibility by starting with what is possible at a given time.

We recommend making a distinction and speak up to the difference between SD and CE, especially for companies or regions in which sustainable development (SD) has a strong focus.

1.2. Inspire and open up for potential development areas

Examples are one of the most effective ways to show the principles of CE in practice, as well as to inspire and open up companies for the potential improvements. Share them!

The closest the example is to your target group the better. If you are talking to hotels, use examples from hotels or accommodation business.

As you go through the different areas for improvement This is the first chance you have to engage them and have a dialog about where their interest. It is also an opportunity to start mapping their activities and flows, by asking them

“how do they deal with their waste, or how do they manage their electricity consumption”.

2. Initial advisory services - Understanding the SME

2.1. Initial contact

Prepare well before the initial contact for the advisory services by obtaining preliminary knowledge about the company from its website, promotional materials, or from the information received at the training.

Keep in mind that companies often have difficulties choosing future initiatives and developing innovative solutions due to the any areas covered in CE, or because a lack of experience in the topic. So the more prepare with examples and best practices the better

2.2. How do they work?

This step is about understanding current flows of material and energy. Understanding how the company works is key to provide suggestions. This step can done more or less formally depending on how the conversation develops, and slowly deepened as the work gets more advanced.

The BMI Module of the Cirtoinno project provide templates for mapping different relations and material (social) flows <http://cirtoinno.eu/know-how/learning-materials/>.

2.3. Benchmark in relation to CE

This step is to understand how many CE or sustainability related initiatives has the company undertaken so far. It may be possible to build upon their current initiatives, for example by framing such initiatives within a CE plan as well as informing branding and marketing efforts. An assessment tool was develop under the Cirtoinno project, it could work as an initial benchmarking [\(see link\)](#).

Under this step (or latest at the beginning of deep advisory services) we strongly recommend a personal visit to the company, because it is easier to have an idea and evaluate how the current evaluation is through direct experience.

2.4. Focus and Engagement

After this initial approach companies may be at different levels of clarity in relation to the path forward. Moreover, they will have a certain level of engagement and interest which we recommend to evaluate.

These two aspects clarity of focus and level of engagement can inform how to deepen the advisory and how much energy to put in a given time.

Asking about the resources available, both financial and social capital (for example time available or number of staff dedicated to work in the CE development) may provide a clue for the level of engagement.

In certain regions, companies tend to be more proactive than others. Moreover, it may be an expectation that advisor, will provide a number of support, from vouchers to seed money, especially when associated to a development agency. Make sure to be clear and negotiate such expectations.

Finally, encourage the companies to start the advisory as soon as possible after the training or preparation phase. It helps to keep the momentum going. And by the way, if possible avoid doing such engagement under the business high season.

3. Deepening advisory

This section explains a few different ways in which the advisory services can be deepened, namely they are: Hackathons, matchmaking, focused (expert) advisory or group advising.

It is important to notice that this may not be a one time engagement, but a stepping stone to developing clarity regarding the focus of solution to be developed by a company. Thus it is an iterative (cyclical) process between deepening the advisory and follow up and providing follow up and support.

3.1. Hackathons

A Hackathon is a format developed from IT systems. It basically means that a team of experts (consultants, students etc) come together to evaluate a business (sector) within a short period of time. The main tasks are to map the material flows and processes as well as suggest potential vision and/or actions for moving toward a more circular business.

This approach may be used to map and benchmark as a support to point 2.2 above, as well as to deepen the initial benchmark and expand the possibilities of improvement when a focus area is not clear.

3.2. Matchmaking

Matchmaking relates to referring the client company to an expert. It is also possible to create a collective matchmaking through conferences and fairs in which consultants and solution owners offer their services to companies.

3.3. Focused (Expert) Advising

An individual consultant or company can offer their expertise and support a deeper exploration of CE opportunities in a specific area

For an initial advisory model within the topics of energy, branding / marketing and business model please see the annex 3-5.

3.4. Group Advising or Experience Sharing

This format is valuable to further develop companies understanding circular economy, as well as, to spread general solutions. Moreover this approach helps to get companies engaged by showing it is possible and have them inspired (and challenged) by other business in the field.

4. Follow up and support

The companies may have not the time, staff or resources (or the engagement at the beginning) to keep up with the learning curve nor follow up with the

contacts, and networking required after an advising. So, it helps if the advisor can facilitate and find the right information, examples, or experts in a given area.

For example, it may be that after a focused advisory a life matchmaking is required, or that after a hackathon a bit of focused expert advisory is needed. Alternatively, it may be simply required that a company is supported in synthesizing their learning and create a small plan. It varies from case to case.

In any case, however, such follow up and support is essential to provide a dynamic and organic deepening of the advisory services towards the implementation of innovative solutions.

5. Documentation

Documentation is a good to register progress and be able get back to speed in relation to a client profile after a long period of time. We suggest that documentation could have the following topics:

- What was the original interest and how it has evolved
- General summary of advisors feedback
- A road Map including next steps (when applicable and possible)
- What to consider about the solution/possibility in focus
 - Benefits
 - Challenges
 - Costs and return (in general)
 - Contacts with other experts and service providers
 - General opinion about their desired solution (inquiry)

Annex 1. General Advices for conducting advisory services

- **Take the time that is needed and plan well**

Advisory and implementation takes time, it is about doing, as well as it is about doing it well planned.

- **Give attention to each company as unique context**

General advices can be good, however the fitting advice depends on attention to one client at a time. So even in group advisory, when a participants has a question aim to understand the particular context.

- **Show the Benefit**

The benefit of such solutions must be clear. Work to Identify and express the benefits of the area and solution, whether they are financial (ROI), soft (branding), or simply being aligned with an ideal.

- **Do iterations**

It is an iterative process, not a one-off meeting. Think about it, and offer a common exploratory process, it is a dialog to tailor the best solution. Not a medical diagnosis.

- **No one knows it all.**

Even though we are experts, we are not experts in everything. Be clear on what can you advise yourself, and where it is better to look for partners.

Annex 2. General Advising Cycle - Contact and work points

The below is a general structured focused on an general or focused (expert) advising.

- **1st Step: Advisory Focus**

After stablishing an understanding of CE and related solutions, this step aims to further explore the focus of advisory service. It may be carried in person or virtually.

This step includes one or more of the following items.

- Exploring the desired solution and/or current problem
- What is their interest for doing such development work
- What do they expect to gain out of it.
- Define expected outcomes and targets
- Time frame for the development and implementation
- Check available resources (financial or not)
- Check on ideas for promote it among stakeholders /audience /customers /clients

- Talk about “What kind of advice SME is looking for” (i.e what would help to implement or further develop in the desired area.
 - Any particular question or doubts in relation to the solution/area
- In between meeting – Exploring which information is needed to move forward. Finding contact and best practices, formulating the advisory focus in a clear document.
- 2nd Step: Sight Visit
The main aim is to Understand their current situation by exploring current practices/facilities regarding the desired solution/area of exploration. To conduct this step it might be required that a field expert other than the advisor is invited to the visit.
- In between meeting – Summarizing the information, making analysis of the data and formulating opinion and road map for possible areas of improvement and solutions. – Step 3 might be conducted in conjunction with step 4 and 5. In this case the preparation of an overall road map (next steps) and the report should be done in this interim.
- 3rd Step: Advice for possible solutions, contacts and next steps
In this step: Show examples and share advices - An relevant aspect here is to talk about financing possibilities and potential pay off time (when applicable, and in approximate fashion). If needed bring to the meeting or connect SME to an expert. Discuss the next steps and the road map for further development.
- In between meeting – This may be an iterative part and SME may need support and nudging to get and keep the momentum.
- 5th Step Final rapport
Meeting to discuss the overall feedback and results so far.

Annex 3. Advisory model scenario for Energy

Annex 4. Advisory model scenario for Business Model

Annex 5. Advisory model scenario for Branding and Marketing