



Programme de formation

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“Business Design Strategy”

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Sommaire

| | |
|--|----------|
| “BUSINESS DESIGN STRATEGY” | 3 |
| Training outline | 6 |
| Day 1 — Design, Business Models, and Innovation | 6 |
| Day 2 — Financial Language and Economic Modeling | 7 |
| Coordonnées & Renseignements | 9 |



“BUSINESS DESIGN STRATEGY”

Gain credibility with financial decision-makers (CFOs, CEOs) by adopting the financial vocabulary and tools needed to demonstrate the strategic value of design within your product or service.

Overview:

It has become essential for designers to understand the economic logic behind projects just as much as companies need designers who are comfortable engaging with the entire product value chain – from internal organization to business model.

Despite appearances, financial spreadsheets can become creative and strategic tools when combined with a basic understanding of macro- and micro-economics. This intensive masterclass will enable participants to use the appropriate vocabulary and activate financial levers in order to be heard, gain influence, and build strategic credibility. The good news: none of this is complicated or reserved for MBA graduates.

Lisa Baird, multidisciplinary strategist and former Principal Business Designer at IDEO, will illustrate these concepts through case studies and hands-on exercises based on real scenarios. By the end of the training, acronyms such as SWOT, BMI, VRIO, TAM/SAM/SOM and P&L will no longer hold any secrets.

Duration: 2 days (16 hours)

Schedule: 9:00 am – 1:00 pm / 2:00 pm – 6:00 pm

Maximum participants: 16

Format: In-person, Paris

Learning objectives:

At the end of the training, participants will be able to:

- **Describe** the fundamental principles of business design and its role in the performance of a product or service.
- **Analyze** the key components of a venture (brand, product, organization, business model) in order to identify strategic design levers.
- **Interpret** key financial and economic indicators used in business environments (ROI, cashflow, equity, TAM/SAM/SOM, etc.).
- **Differentiate** between types of costs which form the overall cost structure (fixed/variable, direct/indirect, capex/opex) and **evaluate** their impact on design constraints.
- **Read and interpret** an income statement, balance sheet, and cash flow statement.
- **Build** a simplified financial forecast (pro forma) based on a practical case study.





- **Model** a market using TAM, SAM, and SOM market-sizing frameworks.
- **Argue** for design decisions by integrating economic and strategic considerations.

Assessment methods:

Learning outcomes will be assessed through:

- Practical exercises and case studies conducted throughout the training
- Group work on a simplified financial forecast (pro forma) connected to underlying economic data
- Scenario-based exercises requiring analysis and argumentation of design decisions using financial elements
- A final multiple-choice assessment

At the end of the training, participants receive a certificate of completion

Target audience:

- Product designers, UX strategists, innovation leads, product owners, product managers, and anyone required to collaborate with strategic or financial functions within an organization. The course is particularly targeted to individuals who are ready to gain a minimum fluency with the main creative and technical tool of business (spreadsheet software).

Prerequisites & required equipment

- General familiarity with digital tools and environments (no preexisting knowledge of spreadsheet software is required; only the willingness to engage with it)
- Ability to collaborate and work in groups
- A laptop (Mac or PC) with a recent browser
- Free, cross-platform software required for the training (e.g. Google Sheets)

Instructor

Lisa Baird : Lisa is a multidisciplinary strategist based in Paris. Practically, she is a service, experience, venture, and systems designer; advanced financial modeler, information architect, interactive data visualizer; qualitative design researcher, writer, developmental editor, copyeditor; and a strong oral communicator with facilitation skills, performance sensibilities, and an ability to speak on stage.

During undergraduate studies, Lisa earned a bachelor's degree in finance and a bachelor's degree in print journalism, both from the University of Texas at Austin. Ten years later, she earned a master of business administration from the University of California–Berkeley, which included a semester in luxury brand management at ESSEC Business School outside Paris. Five years later, she earned a master of design from California College of the Arts in San Francisco where she focused on design research, UX, and interaction design.



Lisa started her career in investment banking in New York before moving into strategic finance and corporate strategy on the client side for seven years. After a stint as a grant-maker at the Bill & Melinda Gates Foundation in Seattle, she returned to the San Francisco Bay Area as a principal business designer for the design and innovation consultancy IDEO where she specialized in business design, venture design, systems design, and interactive data visualization, primarily in the education and media-technology studios. Between 2015 and 2022, she built a healthy design + strategy consulting practice with clients like IDEO, frog, COLLINS, and others. In 2022, she moved her business from California to France to launch [Fraîche Design Thinking](#), where she serves as president and creative director.

Registration deadline: 1 business day before the start of the training



Training outline

Day 1 – Design, Business Models, and Innovation

Business Design: posture, role, and dialogue with finance stakeholders

- Understanding what business design is and its role within organizations
- Identifying the links between design, strategy, and economic performance
- Becoming familiar with the point of view of financial stakeholders (CFOs, finance teams, product leadership)
- Developing a posture that enables effective dialogue with these stakeholders

Venture Design: understanding the structure of a project

- Gaining a holistic view of the components of a project or organization
- Understanding where design sits within the value chain
- Connecting design decisions, strategy, and business model
- Practical exploration:
 - The four pillars of a venture (brand, product, organization, business model)
 - Desirability / feasibility / viability Venn diagram
 - Competitive analysis (SWOT, VRIO)
 - Strategic positioning and organizational culture
 - Market-sizing concepts: TAM / SAM / SOM

Cost structure and accounting logic

- Understanding how cost structures influence design decisions
- Identifying different categories of costs within a company
- Visualizing the economic impact that a product or service has on the organization
- Practical exploration:
 - Fixed vs variable costs, direct vs indirect costs
 - Business Model Canvas
 - Cost accounting vs financial accounting
 - Capex vs opex
 - Operating leverage

Invisible innovation and strategy

- Understanding innovation beyond the product or the brand
- Identifying the role of the business model in innovation
- Connecting research, design, and margin expansion (through either revenue generation or cost mitigation)



- Practical exploration:
 - Invention vs innovation: mapping innovation models
 - Technical vs complex challenges
 - The four orders of design
 - Business model innovation (BMI)
 - From research to revenue
 - Analysis of briefs and growth strategies

Day 2 – Financial Language and Economic Modeling

Credible financial and economic vocabulary

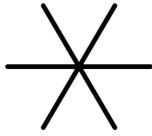
- Understanding core macro- and microeconomic concepts
- Identifying how economic decisions impact design projects
- Mastering financial vocabulary used in business environments
- Practical exploration:
 - Macroeconomics: interest rates and monetary policy, debt vs equity, financing and fundraising, ROI, NPV, IRR
 - Microeconomics and the firm: income statement, top line vs bottom line, budgets and P&L, balance sheet and cashflow, budget variance, goodwill, cash vs accrual accounting
 - Reading and annotating financial documents
 - Comparative analysis

Reading and building financial statements

- Understanding financial statements used within organizations
- Visualizing the impact of design decisions on economic performance
- Collaborating effectively with finance and leadership stakeholders
- Intensive spreadsheet workshop:
 - Building the three financial statements:
 - Income statement (top line / bottom line)
 - Balance sheet
 - Cash flow statement
 - Interconnection between financial statements
 - Economic scenario simulation
 - Budgets and P&L
 - Cash vs accrual accounting
 - TAM / SAM / SOM calculation
 - Building a financial forecast (pro forma)

Open discussion and closing

- Exchange session and open discussion
- Q&A and feedback on key learnings



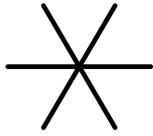
DES LIEUX INSPIRANTS DÉDIÉS À LA COLLABORATION

L'Atelier Beaubourg (75004) est situé derrière le centre Pompidou. 120m² modulables et conviviaux, entièrement dédiés à la formation.



L'Atelier Joliette (13002) est situé entre la gare, le Panier et le Vieux-Port à Marseille, dans le quartier de la Joliette.





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