

Make the Capability Rentable

Companion Toolkit

Book 4 of Rentable Expertise by Alex Tran

Define a useful offer while protecting the retained core, testing the separate business case, and making delivery obligations explicit.

For business leaders considering whether an internal capability should become an offer other organizations can use.

How to use this toolkit

Choose one real decision and one relevant worksheet. Print the PDF or type into the Word version. Keep your working copy private and use fictional or redacted information when asking others for feedback. No book purchase or paid membership is required.

These exercises adapt the book into working records. They are not a reproduction of every chapter or a test with a total score. Chapter references identify the basis; the worked example is fictional. Use Sources and Notes to review the chapter map and further reading.

Choose a worksheet

- 01 Find the valuable capability
- 02 Separate the offer from the core
- 03 Make the internal investment case
- 04 Make the second investment case
- 05 Price the complete delivery
- 06 Bound authority and consequence
- 07 Describe the commercial object
- 08 Design an intelligible ending
- 09 Set learning permissions
- 10 Review the offer over time

Write unknown when evidence is missing. Finish with a decision, a named owner, and a review point. A completed worksheet does not itself grant permission to act.

Find the valuable capability

Identify an outcome your company can produce and the evidence that makes it valuable.

Hidden capability is not necessarily valuable capability. Start with the outcome and its evidence, not a package you want to sell.

1. What valuable outcome does the company repeatedly produce?

2. Who benefits and what do they otherwise do to obtain that outcome?

3. Which people, routines, context, data, and systems produce it?

4. What evidence shows an advantage beyond an impressive demonstration?

5. What could a capable competitor or general tool reproduce easily?

6. What remains distinctive, and what must be investigated before offering it?

Decision owner _____ Review date or trigger _____

Separate the offer from the core

Distinguish what travels to a buyer from the foundation that stays with the supplier.

A portable package can depend on a larger operating system. Keep insight or output access distinct from access to the underlying database or method.

- 1. Buyer outcome and the exact item, access, or service offered**

- 2. What is delivered, licensed, or accessible without being transferred?**

- 3. What must remain with the supplier and why?**

- 4. Dependencies that do not travel: data, infrastructure, people, rights, or maintenance**

- 5. What must the buyer supply for the capability to work in its environment?**

- 6. Boundary that protects the core while still giving the buyer usable value**

Decision owner _____ Review date or trigger _____

Economic consequence comes before spreadsheet precision. Use scenarios, ranges, and explicit uncertainty appropriate to the commitment.

- Decision owner _____ Review date or trigger _____

Make the second investment case

Decide whether selling access deserves fresh capital and attention on its own merits.

The internal investment does not justify the external business. Include the opportunity cost and the burden on the company that created the capability.

- 1. Who is the reachable buyer, and what evidence supports demand?**

- 2. Fresh cash and operating attention before meaningful customer receipts**

- 3. Sales cycle, procurement friction, onboarding, and customer-specific work**

- 4. Support and delivery costs; margin after serving the customer**

- 5. What happens if sales take twice as long or support costs double?**

- 6. Would we invest if the internal capability arrived free today? State the decision**

Decision owner _____ Review date or trigger _____

Price the complete delivery

Expose the work hidden behind a clean demonstration and a simple price.

The customer relies on a working capability over time. Include change, maintenance, and failure response in the economics.

- 1. Usable customer outcome and the proposed priced unit**

- 2. Onboarding, integration, preparation, and review work per customer**

- 3. Ongoing model, data, infrastructure, specialist, and support costs**

- 4. Exceptions, rework, changes, and obligations over time**

- 5. Usage assumptions, uncertain costs, and capacity constraints**

- 6. Observed evidence needed to test margin and the ability to serve another customer**

Decision owner _____ Review date or trigger _____

Bound authority and consequence

Specify the permission and evidence required before another organization relies on the capability.

Capability does not create authority. A sale also creates reliance, so the boundary must remain workable after the initial demonstration.

1. Permitted job, environment, inputs, and output

2. Actions allowed automatically and actions requiring human approval

3. Worst plausible error, affected people, and reversibility

4. Qualification cases, review criteria, and evidence of fit

5. Human escalation, stop right, fallback, and incident response owner

6. Version or dependency changes that require notice and requalification

Decision owner _____ Review date or trigger _____

Describe the commercial object

Give buyer and supplier a shared description of what the transaction includes.

This is a business scoping worksheet, not contract language. Qualified commercial and legal reviewers must settle the actual rights and obligations.

1. What exactly does the buyer receive or access?

2. Included scope, excluded work, usage limits, and term

3. Buyer inputs, permissions, environment, and responsibilities

4. Supplier support, maintenance, availability, and change obligations

5. Rights or dependencies that could prevent the promised delivery

6. Unresolved commercial questions and who must resolve them before a commitment

Decision owner _____ Review date or trigger _____

Design an intelligible ending

Make the relationship end safely while preserving the agreed boundaries on both sides.

Buyer survivability and supplier retained core both matter. A repeatable deal should reduce avoidable reinvention without concealing consequential exceptions.

1. Buyer records, outputs, configurations, and learning needed after exit

2. Supplier retained core and rights that do not transfer

3. Export format, meaning, dependencies, transition help, and practical test

4. Retention, deletion, continuing use, and support questions to resolve

5. Standard position versus an exception that needs a named approver

6. Evidence that the exit is workable and that the next deal can be served sustainably

Decision owner _____ Review date or trigger _____

Set learning permissions

Record what may be learned, kept, and reused instead of treating every improvement as automatically available.

Learning can change prompts, tests, workflows, software, or people without changing model weights. An artifact is not itself a right to reuse it.

1. Data, outputs, corrections, logs, and other learning artifacts involved

2. Whose information or rights are represented in each artifact?

3. Permitted improvement for this customer only

4. Any permitted reuse across customers, with its scope and conditions

5. What must stay isolated, be deleted, or require separate permission?

6. Approver, record of permission, review trigger, and correction process

Decision owner _____ Review date or trigger _____

Review the offer over time

Decide whether the capability still deserves investment and external supply.

A capability can become easier to build or substitute. Portfolio visibility should expose allocation and concentration without taking operating ownership away from the people closest to the work.

1. Current differentiation, customer value, and evidence

2. Buyer and supplier learning rates and changed alternatives

3. Retained core, dependence, and concentration across the portfolio

4. Delivery margin and governance or support capacity

5. Choose continue, invest, narrow, partner, transfer, or retire; explain the tradeoff

6. Operating owner, next evidence requirement, and review date or trigger

Decision owner _____ Review date or trigger _____

Worked example

A scheduling method offered as a service

Fictional example: Cedar Maintenance uses a method to sequence routine service visits. A neighboring operator asks to use it.

Offer and core

Offer a proposed weekly route from agreed inputs. Retain the scheduling method and internal operating history. Do not share other customers' records.

Separate investment

Validate buyer demand and the cost of onboarding, data cleanup, review, and support. Treat the external service as a new investment even though the internal method already works.

Authority

The buyer reviews the route. The service does not contact customers, change bookings, or make staff commitments.

Learning rights

Keep customer records and case-specific corrections isolated. Any broader reuse needs a documented basis and approval; the absence of model training does not settle the question.

Next decision

Prepare a narrowly scoped pilot using fictional inputs. Resolve delivery, rights, support, and exit questions before making a commercial commitment.

Use the example to understand the method. Choose evidence, limits, and review points that fit your own situation.

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