

Optionality Design Canvas

A practical worksheet for turning an assumed backup path into a usable operating option.

Reader-facing utility | [Open download](#)

Use this canvas on one meaningful customer-operations workstream. The goal is not to maximize the number of providers. It is to decide what must remain movable, make primary and alternate paths visible, identify shared dependencies and activation blockers, and choose the next evidence-producing action.

How to use it

Complete the canvas with the people who own the work, the interfaces, and the activation decision. Use evidence where possible: a tested login, a small pilot, a capacity commitment, a commercial clause, a documented routing rule, or a recent activation drill. “We think we could” is a hypothesis, not proof.

1. Define what must remain movable

Workstream / customer moment

Enter response

Customer promise that must continue

Enter response

Current primary operating path

Enter response

What must remain changeable?

Enter response

Non-negotiable service / control requirements

Enter response

Why preserve an option here?

- ☐ Continuity / disruption
- ☐ Volume variability / surge
- ☐ Geography / language
- ☐ Specialist capability
- ☐ Technology change
- ☐ Economics / commercial leverage
- ☐ Regulatory / control requirement
- ☐ Other

2. Map primary, alternate, and shared dependencies

List credible paths, not theoretical ones. Then name the dependencies that both paths still share. Shared dependencies can be efficient and appropriate; the purpose is to make them visible so you do not mistake two visible providers for two independent operating paths.

#	Primary path	Alternate path	Shared dependency	Portability blocker
1	Enter response	Enter response	Enter response	Enter response
2	Enter response	Enter response	Enter response	Enter response
3	Enter response	Enter response	Enter response	Enter response

The concentration question

What single dependency could disable every path above?

Enter response

3. Test activation readiness

For each layer, capture the owner, the evidence that proves readiness, and the current state. Use “Not ready” when the path exists conceptually but the operating mechanism has not been tested.

Readiness layer	Owner	Evidence / latest test	Status
Data & access	Enter response	Enter response	Enter response
Knowledge & training	Enter response	Enter response	Enter response
Integration & tooling	Enter response	Enter response	Enter response
Staffing & capacity	Enter response	Enter response	Enter response
Commercial terms	Enter response	Enter response	Enter response
Governance & decision rights	Enter response	Enter response	Enter response

Activation trigger and authority

What signal should trigger consideration of the alternate path?

Enter response

Who can authorize the move?

Enter response

What moves first?

Enter response

What customer safeguard must be checked before transfer?

Enter response

4. Make the option economically explicit

Estimated recurring cost to preserve this option

Enter response

Largest one-time activation cost / friction

Enter response

Maximum acceptable activation time

Enter response

Next date the option should be retested or refreshed

Enter response

Keep, strengthen, test, or retire?

- ☐ Keep as-is
- ☐ Strengthen
- ☐ Test in a live/pilot scenario
- ☐ Retire / stop paying to preserve it

5. 90-day action plan

#	Action that will reduce uncertainty	Owner	Due / test date
1	Enter response	Enter response	Enter response
2	Enter response	Enter response	Enter response
3	Enter response	Enter response	Enter response

Decision at the end of 90 days

What evidence changed? Which option became more usable, less usable, or unnecessary? Update the network design based on what was learned — not on the original assumption.