



INNOVATION PLANNING

Part 1: Frame the big picture

IDEASCALE WORKBOOK

Introduction

This workbook is the first in a series of workbooks on innovation planning. This series is designed to guide you through the steps for creating a crowdsourced innovation program at your organization. Our goal is to support your organization in using crowdsourcing to solve organizational challenges and to engage your stakeholders on an individual basis.

Just as innovation is an iterative process, so is innovation planning. So, as you work through these workbooks, you may have insights that cause you to return to earlier portions and revise your answers. Feel free to iterate on these exercises as your program takes shape.

Part 1: Frame the big picture.



In this workbook, you will engage leadership and key stakeholders in setting your **organizational objectives** and **metrics of success**. You will then formulate and refine your **problem statement** to arrive at a clear problem statement that resonates with the crowd and serves the organizational objectives.

Innovation Planning: Frame The Big Picture

A Practical Approach To Building A Robust Crowdsourcing Program

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Objectives

We begin formulating an Innovation Management Plan by taking stock of our objectives. Each person or entity has distinct objectives based on their individual perspectives and priorities. Help build consensus by consulting key leaders, sponsors, decision-makers, and partners.

We take a comprehensive look at objectives, by defining the objectives of different stakeholders at different levels:

- What are the objectives for your innovation or crowdsourcing program?
- What are the objectives of the crowd or target population?
- What are the organizational objectives?

For the strongest positioning of your program, link goals and metrics back to the organizational mission, vision, principles, and strategy.

A clear and comprehensive understanding of objectives will help you:

- Shape an impactful and engaging problem statement
- Driving crowd participation
- Garner buy-in from program sponsors
- Communicate outcomes to leadership
- Refine ideas strategically and efficiently
- Evaluate and Select ideas for implementation
- Win and allocate resources for idea implementation



It is also helpful to articulate what 'type' of innovation you are targeting. Are you aiming for core, adjacent, or transformational innovation?

Here are some additional attributes to consider when defining your innovation target:

Product	Incremental	Tactical	Local	Short Term	Small Investment
Process	Breakthrough	Strategic	Global	Long Term	Large Investment

Metrics

For each objective, there must be a metric, or at least a picture of success. In other words, how will you determine whether these objectives were fulfilled?

Consider both quantitative and qualitative metrics. Your sponsor will likely want to know: How much did we do? How well did we do it? Is anyone better off as a result?

Tracking Progress

When defining a metric, specify the current value or current state of affairs, and the target value or target state (i.e. what does success look like?) so that you can track progress.

If you do not yet know what an appropriate target value is, a pilot project or formal survey may help you discover baseline values and reasonable goals.



Helpful Tips

Sometimes it is helpful to work from an inventory of existing solutions, and their pros and cons, to then describe what would be different under the most successful scenario. In some cases it is helpful to literally draw a picture of success.

If this is your first time running an innovation program, it may be appropriate to consider your first proposal for metrics and targets as a 'first draft'. The key is to begin thinking about metrics of success early so that you can make thoughtful and strategic decisions going forward. You can always revise your metrics and targets as you learn more.

Example Objectives and Metrics

Stakeholder: Innovation Management and Comms teams Objective: <i>Participation in IS platform</i>		
Metric of Success	Current value or state of affairs	Target value or state of affairs
<i>frequency of idea submission</i>	<i>5 posts per week</i>	<i>10 posts per week</i>
Stakeholder: Innovation Management Team Objective: <i>Core innovation</i>		
Metric of Success	Current value or state of affairs	Target value or state of affairs
<i># implemented ideas</i>	<i>3 ideas implemented per quarter</i>	<i>6 idea implemented per quarter</i>
Stakeholder: Innovation Management Team Objective: <i>Transformational innovation</i>		
Metric of Success	Current value or state of affairs	Target value or state of affairs
<i># ideas tested</i>	<i>10 ideas implemented per quarter</i>	<i>100 idea implemented per quarter</i>
Stakeholder: Senior Executives Objective: <i>Fulfill mission or vision</i>		
Metric of Success	Current value or state of affairs	Target value or state of affairs
<i>You will likely have a metric for impact for each implemented idea</i>	<i>baseline is idea-specific</i>	<i>target is idea-specific</i>
Stakeholder: VP Sales Objective: <i>Increased conversion from prospect to client</i>		
Metric of Success	Current value or state of affairs	Target value or state of affairs
<i>Conversion rate</i>	<i>10%</i>	<i>20%</i>
Stakeholder: VP of Human Resources Objective: <i>Increased Employee Engagement</i>		
Metric of Success	Current value or state of affairs	Target value or state of affairs
<i>employee engagement score</i>	<i>30</i>	<i>40</i>
Stakeholder: CEO Objective: <i>Increased revenue</i>		
Metric of Success	Current value or state of affairs	Target value or state of affairs
<i>Revenue</i>	<i>\$5 billion</i>	<i>\$8 Billion</i>

Your turn!

Define objectives & metrics of success for each of the key entities, individual, and groups with a stake in your initiative:

i.e. leadership, sponsors, decision-makers, partners, expert evaluators, and target population.

Stakeholder:		Objective:	
Metric of Success	Current value or state of affairs	Target value or state of affairs	
Stakeholder:		Objective:	
Metric of Success	Current value or state of affairs	Target value or state of affairs	
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Metric of Success	Current value or state of affairs	Target value or state of affairs	
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Metric of Success	Current value or state of affairs	Target value or state of affairs	
Stakeholder:		Objective:	
Metric of Success	Current value or state of affairs	Target value or state of affairs	

“If you have a goal, write it down. If you do not write it down, you do not have a goal - you have a wish.”

-Steve Maraboli

Innovation Problem Statement

The problem statement is the question or challenge you will pose to the crowd.

Consider the invisible audience. The audience or crowd should have a stake in the resolution of this problem and should be in a position to propose solutions to this problem.



If you do not have a problem statement at this moment, try the following approach:

1. Review problems that have surfaced through feedback channels to develop a list of possible issues to address.
2. Prioritize the list based on how crucial the problems are to your organization.
3. Refine the prioritized list with input from the target population. Meet with the members of the target population that experience the pain point you are trying to address. Alternatively, you can run a “problem statements campaign” on IdeaScale to crowdsource input from stakeholders. Stakeholder input will help you pinpoint exactly what the concern is so you know precisely which problem to pose to your crowd for ideation around solutions.

Innovation Problem Statement

Consider the following components of a well-defined problem statement:

1. Who is the target population?

It is important to consider the target population, the people who are impacted by this problem, the people who would benefit from a solution to this problem. This is critical because different people will have different needs, motivations, and priorities. When we know for whom we solve the problem, we can put ourselves in their shoes. This helps us better understand the problem itself, and it helps us develop the most fruitful ideas.

2. What is the target population trying to accomplish?

To uncover target population's needs and motivations, we recommend interviewing some people experience the problem in question. It is also best practice to inventory existing solutions and outline what is working and what is missing. Based on these insights you can understand the full scope of the problem and envision a "picture of success". Finally, translate this vision into concrete measurable outcomes that will indicate success.

3. Are there any constraints that narrow our scope?

Enforce the power of constraints. While well-intentioned, the number one mistake we see in crowdsourced innovation campaigns are very broad open-ended questions. A problem statement that has no parameters creates a barrier for engagement. Users need some structure if they are going to respond or engage. Constraints provide a framework for how to think about or engage on a question or topic. Additionally, constraints serve as guidelines for your crowd for offering ideas or solutions that fulfill your picture of success.



“If I had an hour to solve a problem I'd spend 55 minutes thinking about the problem and 5 minutes thinking about solutions.”

-Albert Einstein

Innovation Problem Statement

Initial problem statement for crowdsourced innovation

How can we help [target population][action verb][constraint or qualifier]?

How can we help staff commute to the University on a daily basis?

(Make sure this problem is relevant to your crowd. The crowd should have a stake in the resolution of this problem and should be in a position to propose solutions to this problem.)

For whom are you solving this problem? Get specific with a name, age, occupation, and story.

Inventory the needs of this person. What are they trying to accomplish?

Inventory existing solutions

Pros

Cons

Inventory existing solutions	Pros	Cons
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What does success look like when this problem is solved? (use a drawing or narrative)

Define a metric of success? What outcome indicates that this problem is solved?

Rephrase the problem statement as needed based on your insights from the inventories of needs and existing solutions and your picture of success:

How can we help [target population][action verb][constraint or qualifier].

Example Innovation Problem Statements

Concept

"We are moving into partnering with two local area hospitals to do community health needs assessments, which we've completed. Now they're trying to pinpoint the specific catalytic projects [to implement]. One that they've identified is about diabetes testing and where screening could take place. We could use crowdsourcing to inform this, and give us the community's voice for that catalytic project around diabetes screening and prevention."

Problem Statement

- **How can we help people at risk for diabetes get screening conveniently and on a regular basis?**
 - **How can we help people at risk for diabetes reduce their risk factors?**
-

Concept

"We're most interested in figuring out how to engage Millennials. Asking more and more people sounds like a good way to get those ideas."

Problem Statement

- **How can we help more Millennials take on and excel in leadership roles here in [location]?** By leadership roles we mean: board membership, committee membership, and workplace campaign leadership.
 - **How can we make it easier for Millennials volunteer, advocate and donate to causes they care about?**
-

Concept

"I'm new to the [resource development function] at X. We're in a headquarters town for a lot of corporations, and one of my goals is to reach out to all the CSR leads at the companies and I'd love to know how can companies come together to work on a mutual issue within the community so it's a win-win for everybody – not just one company. How can we all work together to solve one particular issue?"

Problem Statement

How can corporations in [location] work together and with X on a shared CSR priority?

The many corporations in [location] are a rich resource of passion and commitment to the well-being of the community.

- **Help us identify alignment between the CSR missions of these many corporations and the mission of X and find opportunities where we can all collaborate to make our community a better place.**
- **Share your ideas on how this X can facilitate and support collaboration and partnership between these corporations.**
- **Help us find skills-based volunteer opportunities for employees to address the shared CSR priority.**

By working together, we can all have a bigger impact!

Related Reading

Blogs:

IdeaScale Blog	www.ideascale.com/blog
Innovation Management	www.innovationmanagement.se
Crowdsourcing Industry Site	www.crowdsourcing.org
The Daily Crowdsourc	www.thedailycrowdsourc.com

Books:

Creating Value with CO-STAR	by Laszlo Gyorffy and Lisa Friedman
The Wisdom of Crowds	by James Surowiecki
Crowdsourcing	by Jeff Howe

A Guide to Open Innovation and Crowdsourcing: Advice From Leading Experts edited by Paul Sloane
(First published in Great Britain and the United States by Kogan Page Limited 2011)