



INNOVATION PLANNING

Part 3: Assembling the Campaign

IDEASCALE WORKBOOK

Innovation Planning: Assemble The Campaign A Tools And Templates For Assembling Your Campaign

- 2 Define Parameters: 7 structural pieces for your campaign
- 3 Campaign Prep Checklist
- 4 Templates
 - Examples Campaign Timeline
 - Campaign Template 1
 - Campaign Template 2: Business Challenge request form
 - Campaign Template 3: Client example (CDER)
- 11 Introduction to Funnels
 - Preparing for Implementation
 - Funnels
 - Refine
 - ReviewScale
 - Assessment
- 16 Related Reading

Define Parameters

A successful campaign takes planning and balance. Begin your campaign design by identifying these seven structural pieces.

Opportunity

Define the problem being solved or opportunity the campaigns taps into.

Tip: Frame this around impact on your organization, specific short-term or long-term goals.

Outcomes

Define success. Is it a certain number of ideas? Total number of participants? Quality of the submissions? Level of participation by key members? Number of implementable ideas? Value to leadership? Employee satisfaction?

Tip: Set goals and success metrics that can be measured using the tools within IdeaScale and other tools you have access to.

Criteria

What needs to be included in a submission for ideas to be evaluated and moved through your workflow? From contact or other identifying information to topic, teams, or inspiration, determine what a complete submission looks like.

Tip: The simplest submission criteria will yield the highest levels of participation.

Community

Who will you invite to participate? Who will assess ideas? Who will moderate ideas? Who will implement ideas?

Tip: If ideas will go through one or more assessment phases, include your evaluators in the design process.

Incentive

Strong messaging and consistent communication with your community goes a long way, but the most successful engagements also provide concrete value to participants.

Motivation: How does this opportunity benefit your community?

Rewards: Think about what would be most valuable to the individuals you most want to engage. Public recognition, participation in the development or implementation process, monetary rewards, access to resources and networking are all proven motivators.

Resources

Design within the confines of the resources available to you. A successful engagement is the most effective way to earn more resources for your next project.

How much employee time do you have for setup, outreach, moderation, idea submission, idea evaluation, and idea implementation? What rewards can you leverage? They don't need to be monetary.

Evaluation

Who will evaluate submissions? What will the process look like? Find your evaluation team and your implementation champions before you launch, their input is invaluable in creating a challenge that will yield manageable, valuable outputs.

Campaign Prep Check-List

- Problem Statement** - Does it serve a business need? Is it relevant to the crowd?
- Program Metrics** - Are the metrics aligned with the objectives of authorities & influencers?
- Assemble team** - Have campaign management responsibilities been assigned to the appropriate people?
- Define idea criteria** - Are criteria aligned with the expectations of eventual implementers?
- Define funnel** - Is it simple, scalable, efficient and does it include subject matter experts, stakeholders, and decision-makers at the appropriate stages? How are ideas moderated?
- Build campaign and funnel in IdeaScale** - "Test drive" idea submission and moderation to preview the process. Adjust configuration settings as necessary. Submit "seed" ideas.
- Communications Strategy** - How do you plan to conduct outreach, promote the campaign, and engage the crowd before during and after the campaign?
- Prepare communication materials** - Are messages drafted, messengers engaged, and channels activated to ensure the timely rollout of your communications plan?
- Conduct outreach to crowd** - Prepare the crowd to participate

Client Spotlight: FDA-CDER

INITIATION TEMPLATES OUTLINE **CRITICAL COMPONENTS REQUIRED FOR EACH CHALLENGE**



Sponsor

An executive-level individual or team that has the authority and desire to take action based on challenge results



Target Audience

Group(s) of employees expected to participate in challenge



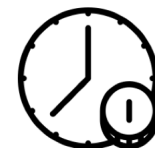
Moderator

Subject matter expert that can represent the sponsor in challenge-based discussions



Incentive

Pre-announced reward and/or recognition that encourages engagement in the challenge



Timing

Short challenges that do not fall during times when many people take leave

Example Campaign Timeline

Theme:
 Problem Statement:
 Resource:

---Pre-Launch---

2 weeks of campaign framing

Activities:

- Assemble Team
- Define goals and metrics
- Create Innovation Problem statement
- Create campaign funnel
- Create communication/engagement plan
- Generate communication materials

1 week of prelaunch outreach

Activities:

- outreach to crowd

---Launch the campaign---

2-4 weeks of ideation

continue outreach to crowd.

2 weeks of vetting and testing

publicize outcomes as they emerge

Implementation

publicize successes to sponsors,
 stakeholders, and crowd



“A leader is one who knows the way, goes the way,
 and shows the way.”
 — John C. Maxwell

Campaign and Funnel Planning Template

Vision for 2030

We are looking for your moonshot ideas to propel our business into the future!
What new value will phones provide to people in 2025?

Idea Submission Deadline: May 31st.

Check out the full brief for the timeline, inspirational material, and details on your opportunity to pitch your ideas to our CEO, George Nodder.

Submission

All employees submit and vote on ideas.

Evaluation

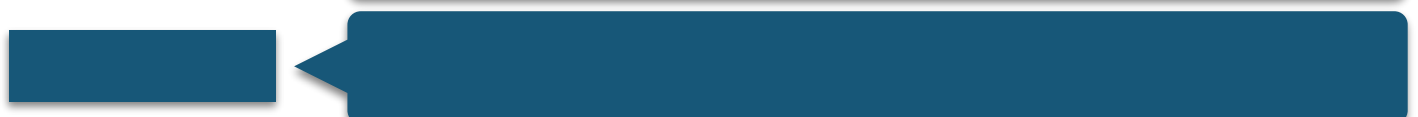
Expert panel reviews ideas on novelty and fit.

Pitch

Idea authors collaborate with coaches to refine their pitch.

Selected

Selected ideas, estimated benefits, and next steps to implementation.



Example Business Challenge [Campaign] Request Form

*To request a Business Challenge [Campaign], please complete this form.
Send completed request form to: [you@yourdomain.com]
Requests are reviewed [weekly, quarterly, daily, ongoing].*

Contact Information

Requesting [Department, Organization]:		Requesting Manager:	
Additional Team Members:			
Date Submitted:		Proposed Launch Date:	

Proposed Business Challenge [Campaign] Overview

	Description	Example	Submission
Topic	<i>What opportunity does this challenge represent?</i>	Cost savings	
	<i>How does this topic impact/benefit employees?</i>	Allows employees to have a direct impact on budgeting and success.	
	<i>Call to action.</i>	More money, less problems.	
Goals	<i>What specific institutional goals or pillars does this support?</i>	Cost savings	
	<i>Identify specific, measurable metrics.</i>	Total budget savings from first round ideas. Total employee hours saved with first round ideas.	
	<i>What is the potential impact of a successful challenge?</i>	Cost savings and workhour savings.	
Participants	<i>Which employees would this be open to?</i>	All employees.	
	<i>When will employees participate?</i>	Management will announce this opportunity, remind employees weekly to take 15 minutes out of their day to participate.	
Criteria	<i>What does an ideal submission look like?</i>	Concise, specific, doable.	
	<i>What identifying information needs to be collected with submissions?</i>	Department of employee submitting idea.	
	<i>List all fields to be included in submission.</i>	Idea Title, Idea Body, Department, "Are any departments already doing this?", "How would this impact your work on a daily basis?"	
Incentives and Rewards	<i>Incentives to participate</i>	Have an impact. Be heard. Participation will be included in quarterly reviews. Individual and departmental rewards throughout challenge.	
	<i>List potential rewards, triggers for awarding, and how many will receive them.</i>	Catered lunch for department with most ideas at the end of the month. Ideas selected on a bi-weekly basis to be researched.	

Resources

Roles and Staffing	Outreach:	
	Moderators:	
	Reviewers:	
Estimated Timeline and Challenge [Campaign] Workflow (please add additional lines for any additional phases)	Prelaunch prep period:	
	Idea collection phase:	
	Assessment phase:	
	Winner(s) announced:	

Materials

Challenge Title	
Challenge Brief	
Image	<i>Attach suggested challenge images.</i>

CDER CROWDSOURCING CHALLENGE INITIATION TEMPLATE

OBJECTIVES

What do you plan to get out of this challenge? How will the results be used?

This list should contain bullets of your overall goals for this challenge.

SPONSOR

What senior leader sees the need for and will act as the face of this challenge?

Insert your response here

MODERATOR(S)

Who will monitor submissions to make sure they are appropriate and respond to idea submissions?

Insert your response here

DATES

When do you want to hold the challenge?

Insert your response here

AUDIENCE

Which office(s) are you targeting?

Insert your response here

INCENTIVE

Is there an incentive for this challenge (based on participation, idea quality, or some other factor)?

Insert your response here



CDER CROWDSOURCING CHALLENGE INITIATION TEMPLATE

INTRO PARAGRAPH

What is this challenge about? Why is it important?

This paragraph will be posted on the home page of the crowdsourcing website and will be used to develop communications plan. Please keep your paragraph to 200 words or less.

DRAFT QUESTIONS

Ask open-ended questions that require non-'yes'/'no' answers

Limit yourself to 3-5 questions and provide **titles** for each question.

CDER CROWDSOURCING CHALLENGE INITIATION TEMPLATE

OPTIONAL FEATURES

Please highlight below the features you would like to utilize for your challenge.

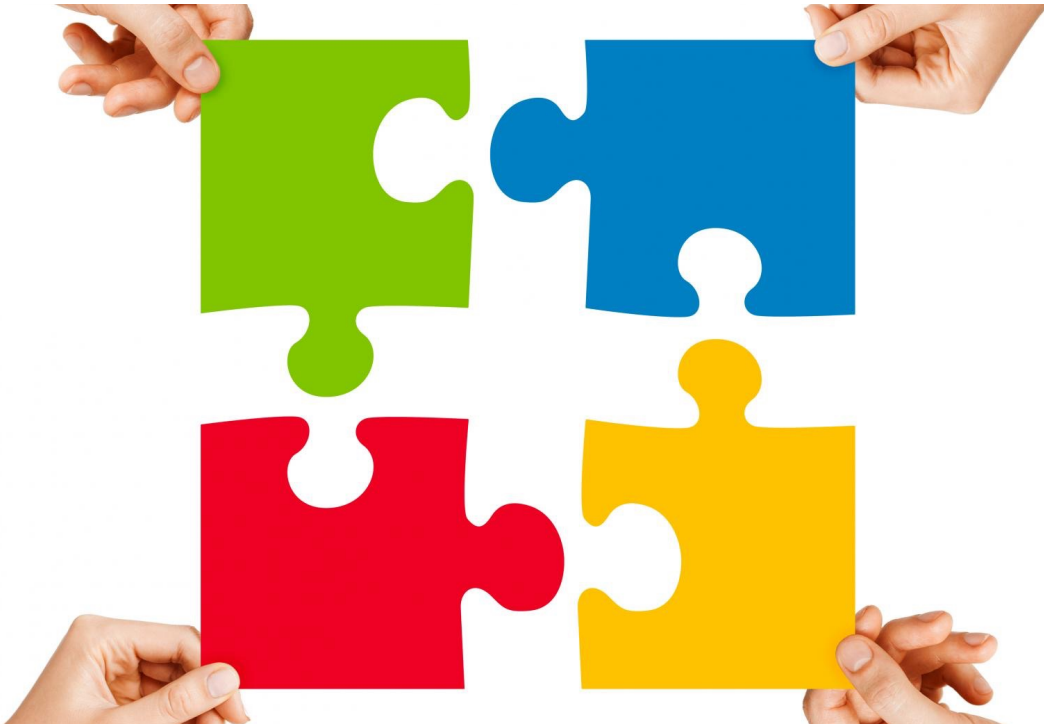
- Executive sponsor photo on crowdsourcing site and in communications
- Turn off voting
- Turn off down voting
- Close voting until the last week of challenge after ideas have been reviewed and selected
- Add profile questions to track demographics
- Incentive for challenge participation
- Send final challenge report to participants
- Using stages
- Posting flyers for challenge promotion

Introduction

This workbook is the third 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 people 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 3: The Path to Implementation



Taking ideas to action is the most exciting part of an open innovation or crowdsourcing initiative. In this workbook, you will define an **idea management plan** that paves the way to idea implementation and sets you up for success. You will set a plan for filtering, refining, and evaluating ideas and for assessing the value or cost of an idea. You will designate the **implementors** - sponsors, partners, or volunteers - who get to bring ideas to life.

This processes will help you chart a course for idea implementation, positioning your organization to realize the full benefits of crowdsourced innovation.

Preparing for implementation

Implementation is the number one place where organizations fall short in crowdsourced innovation. When an organization collects ideas but neglects to act on the ideas, the organization misses the opportunity to enjoy the fruits of their crowdsourcing initiative. Moreover, the crowd's enthusiasm for and trust in the innovation initiative may falter. This does not have to be the case for you!

The key to success is planning for implementation early and addressing barriers to implementation head on. We use a "Yes, And" mentality, rather than "Yes, But".

Here are three challenges related to implementation and some remedies to overcome them:

1. An organization does not have the resources to implement ideas.

Remedy: Run a cost savings campaign. Implement top ideas for cost savings. Invest the funds saved toward the implementation new innovative ideas.

Remedy: Run a campaign tied to an initiative that is already funded to gather input on how that initiative will be executed.

2. An organization has "cold feet" about committing to ideas before seeing the ideas.

Remedy: Set the ground rules early. Imagine an idea that your organization would be thrilled to fund. Imagine an idea that would be completely unacceptable to the organization. What makes these ideas different? Set criteria for an idea eligible for funding. Advertise these criteria at the outset to set expectations and guide the end-users toward proposing actionable ideas. In this way, you make no commitment to implementing ideas below your standards. Additionally, the idea author's understand from the outset why only some ideas qualify for funding, while others do not.

3. An organization is not in a position to implement these ideas.

Remedy: Expand your definition of implementation. Some organizations solicit ideas for solving a problem, but are not in a position to implement those ideas. For example, a non-profit might solicit ideas for solving climate change problems, but might not be able to implement all the technological and policy-related ideas proposed. We recommend leveraging partnerships and expanding your definition of implementation to include tangible progress toward full realization.

Examples of this type of contribution toward implementation include:

- Opportunity for authors of top ideas to pitch to venture capitalists, policy-makers, foundations, or senior leadership within the organization itself.
- Access to accelerator services, expert feedback, mentorship, or coaching.
- Opportunity for authors to network with subject matter experts within the organization's network

Funnels

A successful crowd sourcing campaign generates lots of ideas from the crowd. It also shows users a clear path from ideation to idea implementation that makes end-users understand that their contribution is valued and worth-while.

In order to provide a clear path to tangible outcomes, you will need to create an idea funnel. Having clear stages and criteria helps your crowd understand why some ideas move forward while others don't. This provides predictability and transparency to your process. It also helps users create submissions that are closer to the solutions you seek.

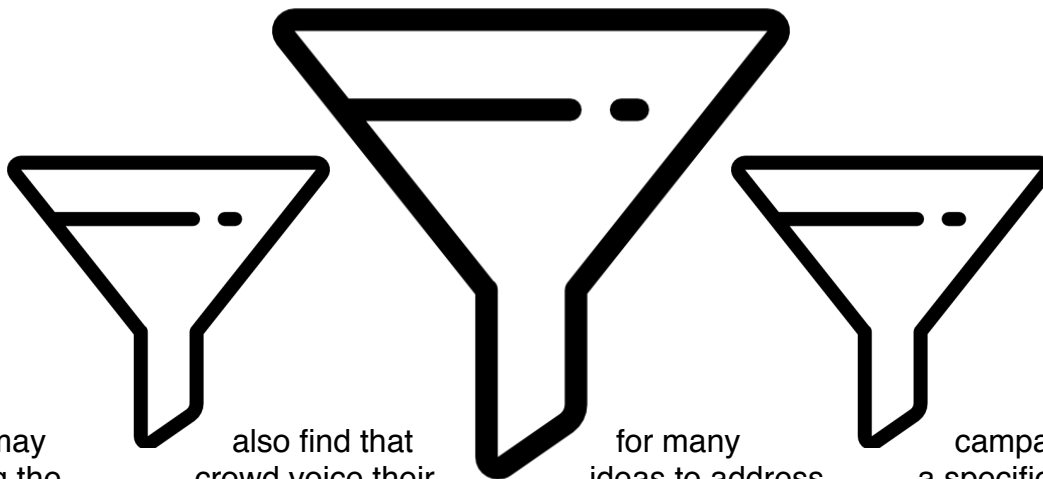
IdeaScale empowers you to build a custom funnel for each crowdsourcing campaign. Here are some of the stages available to you:

Ideate: gather ideas from your crowd and let users vote and comment on submissions.

Review: evaluate ideas against established criteria.

Refine: designated end-users collaborate to refine or validate an idea. This stage can also be used for end-users to report back on prototypes and pilots.

Estimate: designated end-users collaborate to estimate the cost and value for each idea



You may also find that for many campaigns, simply letting the crowd voice their ideas to address a specific challenge and notifying them of what you've done with their ideas may be enough. The key is to make sure your funnel supports the campaign's key objectives and minimizes barriers to innovation for a great user experience.

IdeaScale is packed with features that can help you create an engaging funnel for driving innovation. In the following pages, we

Refine ideas

It's difficult to judge the value of an idea from a title and a brief description. You can include stages in your funnel that ask end-users to refine their idea so you better understand the idea's potential impact and illuminate any hidden assumptions. This refinement stage is particularly important when upfront investment is required to bring ideas to fruition.

Here are some questions you might consider asking idea authors, owners, or the crowd:

Target Audience + Problem or Needs.

Whose needs are directly met by the implementation of this idea? Specify the age group, gender, grade level, personal and professional circumstances. Clearly defining the end-user will help you articulate the need and prove the value of the idea.

The Team.

Who is essential to making this idea a reality? Clearly define the roles and contributions of each team member in terms of expertise and capabilities. Having this clearly explained in the proposal will help your idea win approval for staff and funding or win access to key networks and partners.



Action.

What will the team do to implement this idea and make it a reality? What actions must be taken to test or validate this idea or make it a reality? A series of to-do lists with estimated costs, responsibilities, and target dates is a good approach to getting started!

Solve.

How does this idea solve the problem or directly serve the needs of the people described above? Describe how this solution provides value for your organization and the target audience.

Benefits.

How do you anticipate this idea benefiting key stakeholders in quantitative or qualitative ways? What competitive advantage does this idea deliver to the stakeholders. What is the anticipated return on investment for this idea? If this idea is implemented, what does a successful implementation look like?

(example quantitative benefits: reduction in materials, supply costs, service costs, labor productivity improvements)

(example qualitative benefits: increase in customer or employee satisfaction, quality improvement etc.)

Outstanding Needs.

What resources or information do we need to make this idea a success?

What are the primary open questions, gaps, and needs associated with the implementation of this idea. Does it require funding? If so, how much and is there a possible funding source?

Refine

What information must your decision-makers know in order to make a sound decision? Here are some suggested questions to consider:

Target Audience + Problem or Needs

Whose needs are directly met by the implementation of this idea?

Team

Who is essential to making this idea a reality?

Solve

How does this idea solve the problem or directly serve the needs of the people described above?

Action

What does this idea look like in action? Estimate cost, responsibility, and a date for each action.

Benefits

How do key stakeholders benefit in tangible or intangible ways?

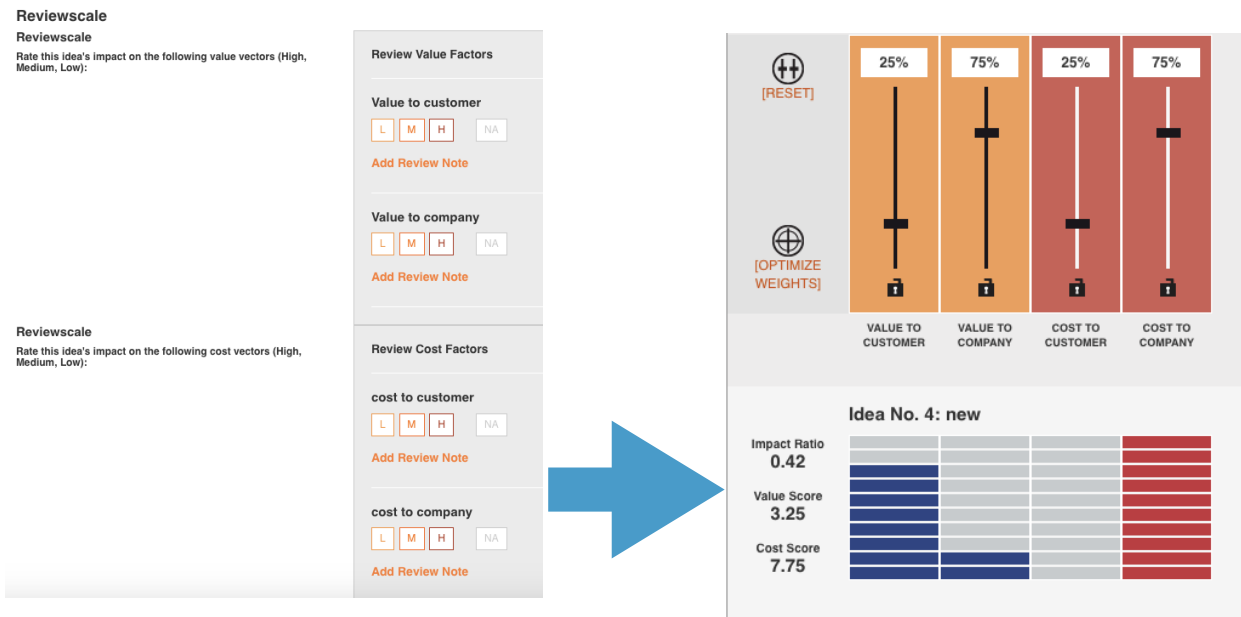
Outstanding Needs

What resources or answers do we need to make this idea a success?

ReviewScale: Assess value and cost of

The realities of budget and staff restrictions will force you to narrow your focus and prioritize only the ideas that are most feasible and have the greatest return on investment. The IdeaScale ReviewScale stage makes it easy to score ideas in a consistent manner against weighted factors.

- Value Factors.** It is critical to understand the value factors that matter most in your organization. Then, determine which of your new ideas bring the most value for both your organizations and your end-users (students, faculty, alumni, etc.) based on those criteria. You can use a point system to assign value, and rank the ideas based on resulting scores.
- Cost Factors.** While it would be great to do absolutely everything, your budget probably doesn't allow that. So, you'll need to rank your top ideas against cost. In addition to requisite monetary investments, don't forget to consider investments of time, facilities, competencies and opportunity cost.
- Constraint Factors.** Finally, you may have other constraints that affect your ability to implement ideas. Some constraints include team member availability, physical location factors, and the need to pilot the idea on a smaller scale before a large rollout. Define all of the constraint factors you face and then rank the ideas accordingly.



“True genius resides in the capacity for evaluation of uncertain, hazardous, and conflicting information.”
 — Winston Churchill

Assessment: evaluate ideas against criteria

Receiving tons of innovative ideas from your crowd is a great problem to have! The IdeaScale Assessment stage makes it easy to score ideas in a consistent manor against your established criteria. Some factors to consider include:

- Feasibility
- Viability
- Desirability
- Impact
- Novelty
- Urgency
- Fit with mission
- Fit with vision
- Fit with purpose
- Fit with principles



Report on outcomes - Take a victory lap!

The senior sponsors of your crowdsourced innovation program will surely ask about the return on the investments in the program. Moreover, the crowd always wants to see what comes of their creative and intellectual contributions to the program.

Thus, we recommend finishing your workflow with a capstone stage in which you gather data on the quantitative and qualitative outcomes of the ideas that advanced toward implementation. This can be done using IdeaScale Refine or Estimate Stages as follows:

- Report on lessons learned while testing, validating, or implementing an idea.
[Use the Refine Stage]
- Report on the actual quantitative return on investment for specific ideas after implementation.
[Try using the Estimate Stage or Refine Stage]
- Report on the actual intangible benefits gained from the implementation of specific ideas.
[Try using the Refine Stage check boxes, one check box for each qualitative goal that was served. This lets you export the data and run stats on the intangible benefits reaped.]

“If you are not willing to risk the unusual, you will have to settle for the ordinary.”

— Jim Rohn

Related Reading

Blogs:

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

Webinars:

[How to Pick the Right Problem to Solve](#)

[How to Design and Innovation Process](#)

[How to Evaluate Ideas](#)

[How to Implement Ideas](#)