



INNOVATION PLANNING WORKBOOK



2 Team & Crowd Engagement



About the Course

Introduction

This workbook is the second 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 organization 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.



Teamwork, collaboration, and engagement are key to the innovation process. A communication strategy is essential for driving the crowd to join the community and submit ideas. Implemented ideas are the fruits of your labor and the currency by which the value of your initiative is defined. An implemented idea can be as simple as an incremental improvement to an existing process or product, or as ambitious as a brand new product or service.

In this workbook, you will build an effective innovation team, and you will get everyone to contribute to your initiative with enthusiasm. You will outline a plan for engaging the crowd and

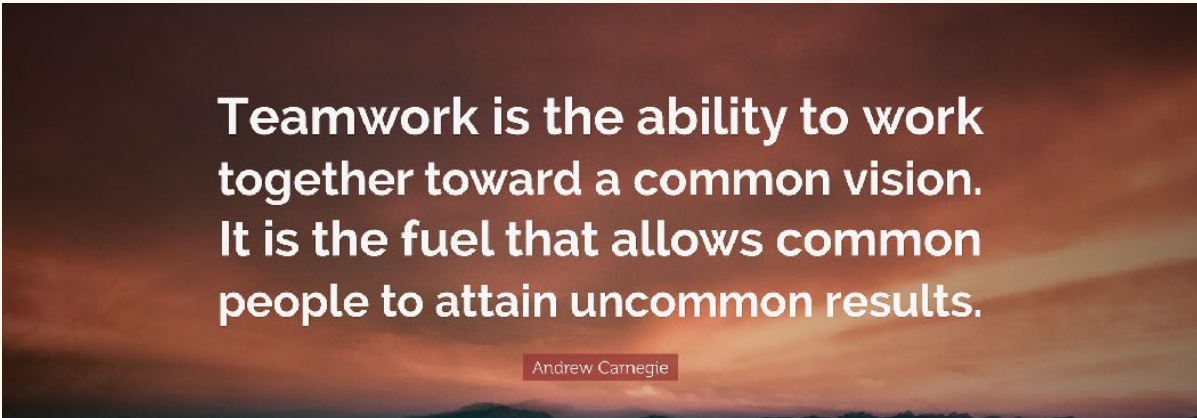
2. Introduction
4. Best practices
5. Team Roles and Responsibilities
6. Your Innovation Team
7. Budgeting Your Time Investment
8. Driving engagement with communication
9. Everything Communicates
10. Know your audience. Drive engagement.
11. Related Reading



Best Practices for Team & Crowd Engagement

Here are some tips for maximizing engagement from all team members and the crowd:

- Trust and Buy-In. Invite early input from stakeholders to build trust and gain buy-in.
- Expectations. Set clear expectations for team member contributions and responsibilities.
- Alignment. Align roles and incentives with the individual priorities of team members.
- Value. Take care to highlight the intrinsic value gained (personally, professionally, or materially) by donors and target populations from participating in your crowdsourcing initiative.
- Frequency. Send out at least one communication each 3-5 days.
- Transparency. Publicize the idea management, selection, and implementation process. This helps your audience submit relevant ideas and helps you evaluate those ideas. This helps you realize the most value from your community.
- Respond and Facilitate. Budget time for your community moderators to respond to each idea and facilitate discussion on top ideas.
- Diversity. Diversify your messages in order to engage a diverse audience. Drawing from a variety of perspectives increases your chances of gathering ideas with high impact, novelty, and relevance.
- Flexibility. Encourage members of the crowd to participate according to their own strengths and interests for quality engagement. Some will be eager to submit ideas. Others will be more comfortable voting or commenting on ideas.
- Celebrate. Advertise the sincerity of your commitment to the initiative by publicly celebrating success when ideas advance. This helps build trust in the system.
- Know your audience. Honoring their needs, interests, and priorities in all your engagement activities is how you reach and activate your audience.



Teamwork is the ability to work together toward a common vision. It is the fuel that allows common people to attain uncommon results.

Andrew Carnegie



Team Roles and Responsibilities

Innovation is a team sport.

In this section, we define some team roles and responsibilities for you to consider as you engage others in shaping your crowdsourcing initiative.

Executive Sponsor or Champion is the face of each campaign. These are the leadership figures with the authority, legitimacy, and credibility in the eye of your donors or target population to make a call to action. It is often advantageous to utilize this person as a spokesperson for your initiative.

Ambassadors or Cheerleaders have unique access to segments of your crowd and can be powerful partners in driving engagement. Your champion can promote the program from pre-launch and throughout to gain buy-in and recruit cheerleaders.

Main Contact is the liaison between your organization and IdeaScale.

Community Administrators have admin rights in the IdeaScale system. Administrator rights include extensive community management capabilities. The time commitment is approximately 8 hours to set up your community and first campaign and 2 hours for each new campaign.

Content Creator is someone who understands your organization's marketing, branding, and/or PR messages. Content creators will create the copy and select the imagery for your campaign. They will generate materials to promote the program and engage the crowd.

Moderators monitor and facilitate lively discussions within the community. Moderators can approve, merge, and edit ideas; approve comments; and move ideas between stages. For setting expectations, see page 6, *Budgeting your time investment*.

Subject Matter Experts and Groups: users can be organized into groups in order to control their participation at different stages or control their ability to see different campaigns. The group feature is often used to designate a jury, committee, or expert evaluation team with decision-making powers for advancing ideas through the idea funnel. For setting expectations, see page 6, *Budgeting your time investment*.

Implementors (idea owners): Taking ideas to action is the most exciting part of an open innovation or crowdsourcing initiative. Implementors might be partners, sponsors, or community members. The key is that implementers are the people who get to bring ideas to life.

Legal Contact (if applicable): The involvement of a legal contact is only necessary if your project requires special Terms of Use agreement between your organization and the end-users.



Your Innovation Team

Use this worksheet to identify your teammates and log their contact info (email, phone, and timezone). Also, take time to recognize what each person brings to the team and to understand what each team member hopes to get out of the engagement. Some people may play several roles on your team.

Roles and Responsibilities	Name and contact info	Key Strengths	Personal priorities
Executive Sponsor or Champion			
Ambassador / Cheerleader			
Main Contact			
Community Administrator			
Content Creator			
Moderator			
Group: Subject Matter Experts or Jury			
Other Groups			
Implementors (idea owners)			
Legal Contact (if applicable)			

Budgeting your Time Investment

As you plan your innovation initiative, one pressing question will be:

How many people do I need for managing the idea flow in the community? Below is a table for a quick estimate.

It is important to understand the factors that go into this estimate:

- The size of the audience invited (aim for at least 2000. 50-100 is okay for tight-knit groups)
- The proportion of this audience that joins the community (rule of thumb 10%)
- The proportion of the community members that enter ideas (rule of thumb 1/3)
- The complexity of your idea funnel or workflow

Managing your workload and time investment is a balancing act. For example, if you find that your original process is too ambitious for your staffing, then you might simplify your evaluation process, or you might utilize crowd votes to filter ideas.

The engagement rate (10% or otherwise) will depend on several factors:

- Is the problem statement compelling, inspiring, or relevant to their own interests?
- Is the platform easy to access? Are accommodations made for those without access to a computer or smartphone?
- Is your outreach campaign effective in message, messenger, channel, and frequency?
- Does the intrinsic value of the campaign align with the audience's interests?
- Do the incentives for participation align with the audience's interests?

If your engagement rate is lower than your target, then you may need to adjust your approach to one of the five points above. For example, you may need to rephrase your challenge statement to highlight the relevance of the question to the crowd. Or you may need to enlist a high-profile leader to serve as a spokesperson.

In the table that follows, please estimate the amount of time it may take your team to conduct the various actions needed to cultivate a vibrant innovation campaign.



	Example	Your own estimates
How many people will be invited to join the community?	<i>6000 people are invited to participate</i>	
If 10% join your community, the number of community members will be:	<i>600 people join the community</i>	
If 1/3 of participants submit an idea, the number of ideas for your review will be:	<i>200 ideas are submitted</i>	
Respond: 5 minutes to respond to each idea	<i>16 hours are needed for responding to 200 submissions</i>	
Facilitate: 10 minutes for facilitating continued discussion on half the ideas	<i>16 hours are needed to facilitate discussion on 100 ideas</i>	
Evaluate: 15 minutes to evaluate the top 10% of ideas	<i>2 hours are needed for each expert evaluator to evaluate 10 ideas</i>	



Driving Engagement with Communication

There are several best practices to follow for creating engaging content. As with all good content creation, these practices should be continuously tested and reexamined within each campaign.

Know your audience. It's especially important for the different corporate partners to know their employees and craft content that best speaks to them. In our experience, personalized and custom content always works better than boilerplate content.

Get to the point quickly. In our experience, this can be the most difficult component to balance, especially when telling a story or trying to convey emotion. However, it's important to be concise as you're battling attention not only online but with other work priorities.

Be open and honest. Transparency is especially important when speaking to younger employees who are saturated in digital media, and creates a sense of trust within the group.

Be emotive. We've found that emotionally driven content tends to drive more engagement. Facts, statistics, and explanations of strategy can get "heads nodding" and activate the analytical brain but are not powerful ways to activate a user's emotions. These should be used sparingly, or users will tune out. Authentic, emotive voices that get "hearts pumping" are what drive people to act.

Tell a story. The best messages are delivered in the form of a story. Stories help the reader better understand the problem in question and build empathy with the target population we aim to help.

Include topical references. When possible, it helps to include current events in the conversation to help people relate and keep the conversation top of mind.



Everything Communicates

Inside the IdeaScale community

Images + Colors + Branding (see [images](#) article)
 Welcome Message
 Campaign Title + Description
 Stage Titles
 Idea submission instructions
 Idea and Refinement Questions
 Criteria and metrics of success
 Jury composition
 Incentives, Rewards, Recognition
 Moderation activity and frequency
 Implementation Plan and Resources

Outside the community

Leadership's call to action
 Leadership's mode of communication
 Leadership's frequency of communication
 Leadership's celebration of success
 Leadership's follow-through to implement

Channels (choose at least 4)

In-person meetings
 Group meetings
 Company Town Hall meetings
 Social Media
 Blogs
 Press Release
 Posters, postcards, print
 Newsletters
 Promotional videos
 Email - *broadcast and notifications in IdeaScale

Tactics for viral growth

Idea authors share their own idea
 Existing members invite new members
 Partners with large audiences retweet for you
 Partners with large audiences share your posts
 Leaders blog in your crowd's primary news outlet
 Posts include compelling images



Know your audience. Drive engagement.

Know your audience.

Who is your audience? Who is in your crowd?

What is important to your audience?

Describe what the crowd gains from participating. What is the intrinsic value gained?

Drive engagement.

Is your problem statement relevant or urgent for your audience?

What incentives (monetary or non-monetary) or rewards can be put in place to drive participation?
(example non-monetary incentives: opportunity to present the idea to prominent figure, LinkedIn reference from senior executive, celebrity voicemail message, profiling the author and their idea in the organizational blog, expert feedback, mentorship)



Know your audience. Drive engagement.

Draft at least four different messages you might convey through the above channels. (See additional resources for example messages.)

Who will facilitate discussion and ongoing participation within the community?

How much time can they dedicate?

At what frequency can they engage with the community? (see page 5)

How might you publicly celebrate success and recognize participation and contributions?

What is the planned outcome for key ideas?



Related Reading

Blogs:

IdeaScale Blog www.ideascale.com/blog

Innovation Management www.innovatonmanagement.se

Books:

- Creating Value with CO-STAR by Laszlo Gyorffy and Lisa Friedman
- Innovation Accounting: A Practical Guide for Measuring Your Innovation Ecosystem's Performance Book by Dan Toma and Esther Gons
- 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)

IdeaScale Professional Services:

ps@ideascale.com

