



INNOVATION PLANNING WORKBOOK



About The Course

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.



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.



Innovation Planning: Idea Management for Implementation

A Practical Approach To Building A Robust Crowdsourcing Program

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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 of 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.



Funnel

A successful crowdsourcing campaign generates lots of ideas from the crowd. It also shows users a clear path from idea1on 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.

ReviewScale: 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.



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, and 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 to 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 Ideas

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 Ideas

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 manor 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.

Review Value Factors

How strong is the impact of this idea in terms of new revenue? ✓

Add Review Note

NA L M H

How desirable is this idea with customers? ✓

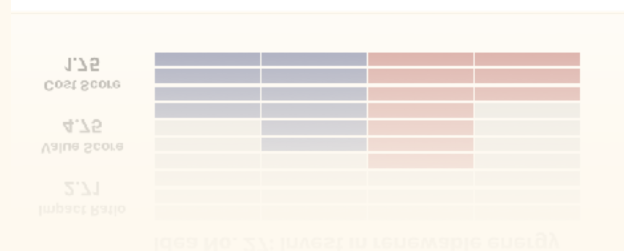
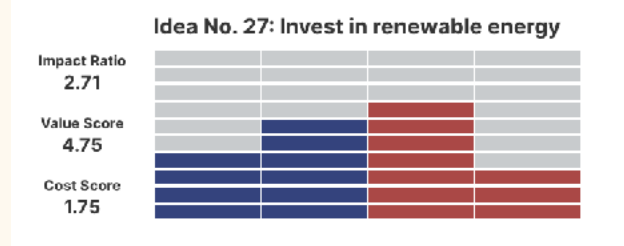
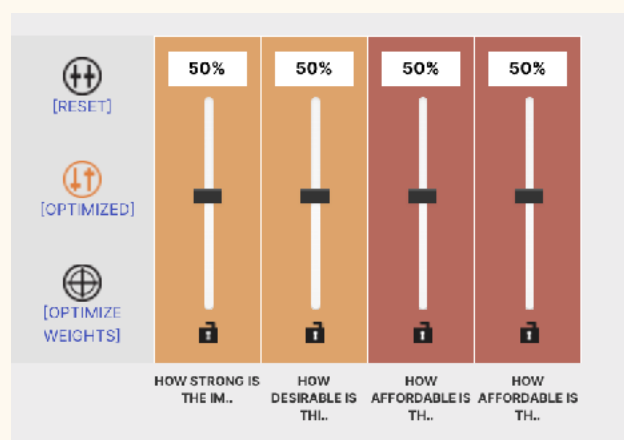
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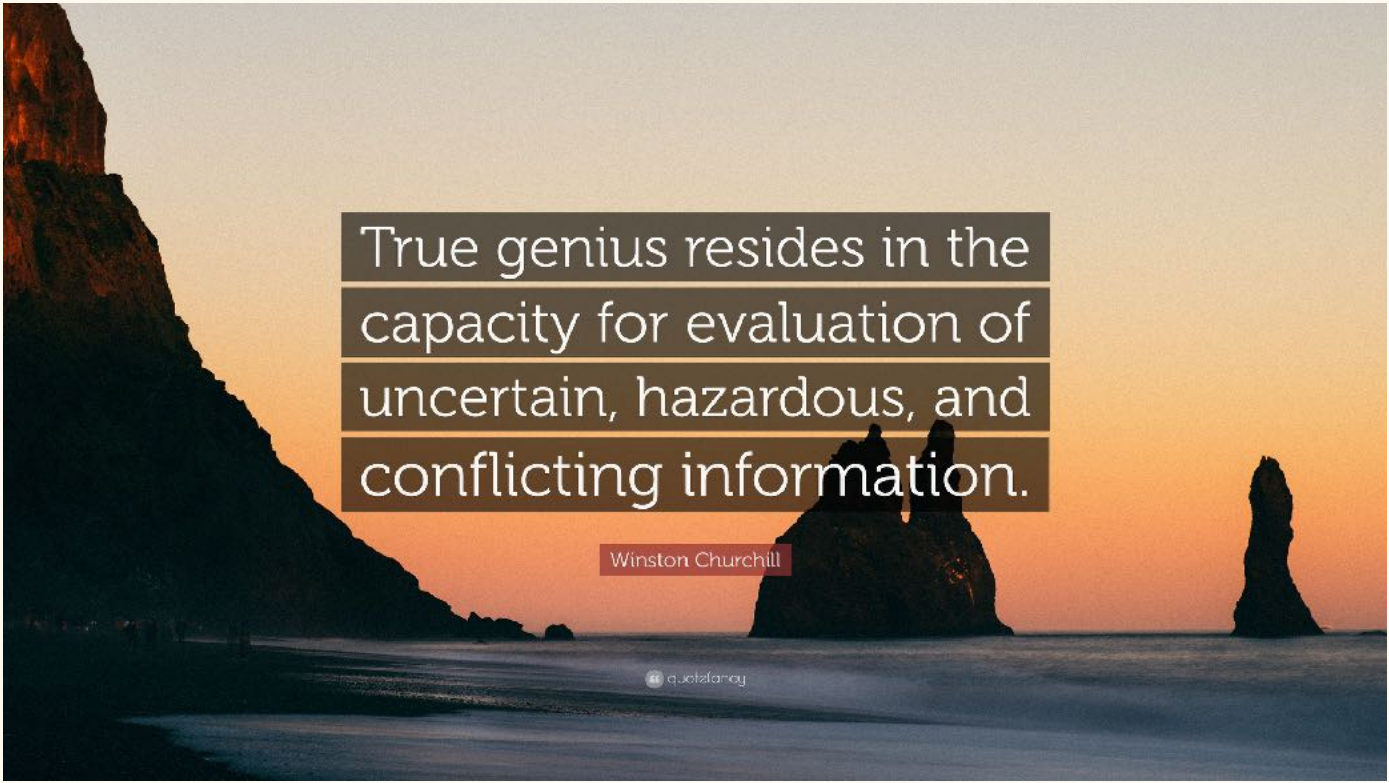
NA L M H

Key

- H High
- M Medium
- L Low
- NA Not applicable

- NA Not applicable
- L Low
- M Medium
- H High





True genius resides in the
capacity for evaluation of
uncertain, hazardous, and
conflicting information.

Winston Churchill

quotefancy

ReviewScale: Assess Value and Cost of Ideas

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 projected or actual quantitative value or return on investment for specific ideas after implementation. [Try using the Estimate Stage or Refine Stage]
- Report on the projected or 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



Campaign and Funnel Planning Template

Here is an example of an IdeaScale funnel comprised of IdeaScale stages:

<p>[Campaign Title]</p> <p>[Challenge Statement]</p> <p>[Campaign Brief Details]</p> <ul style="list-style-type: none"> • Timeline • Evaluation criteria • Intrinsic value for the crowd, incentives, or rewards • Implementation Commitment on the part of campaign sponsor

Example Campaign and Funnel Planning

Here is an example of an IdeaScale funnel comprised of IdeaScale stages:

[Stage title and function]	[Description of activities and permissions in this stage.]
Ideate	In this stage, users submit, vote and comment on ideas.
Build Team	In this stage, users are invited to join teams to develop their ideas.
Refine	In this stage, users or teams refine ideas into stronger value propositions.
Assessment	In this stage, subject matter experts review the ideas for selection.
Fund	In this stage, decision makers invest in funds they want to invest in.
Selected Ideas	In this stage, ideas have been selected for further development
Implemented Ideas	In this stage, ideas are labeled as fully developed and celebrated for their value.
Reserve	In this stage, ideas are stored that are currently not active in the innovation workflow.



Campaign and Funnel Planning Template

Now it is your turn. Use the table below to create your own funnel using IdeaScale stages. You can review the [All About Stages](#) article for specific stage setting details.

[Stage title and function]	[Description of activities and permissions in this stage.]

Campaign and Funnel Planning Template

In this section, please brainstorm notes and milestones for your campaign.

Theme:

Challenge Statement:

Resource:

---Pre-Launch---

2 weeks of campaign framing

Activities:

Assemble Team

Define goals and metrics

Create Innovation Challenge Statement

Create campaign funnel

Create communication/engagement plan

Generate communication materials

Train moderators and experts on their roles throughout the campaign

1 week of prelaunch outreach

Outreach to crowd

---Launch the campaign---

2-4 weeks of ideation

Continue outreach to crowd

2 weeks of voting 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*



Check-List

- **Problem/challenge statement** - for whom do we solve the problem? What is their key pain-point?
- **Organizational objectives and metrics** - how does the challenge statement advance the organizational goals?
- **Assemble team** - assign team roles and responsibilities and set expectations for time commitments across the campaign's workflow.
- **Define criteria** - what constitutes an actionable idea?
- **Define funnel** - define the pathway to implementation, including a plan for idea refinement and assessment. Inventory resources for implementing ideas.
- **Build campaign and funnel in IdeaScale** - describe what types of information is needed to advance ideas to the next stage.
- **Communications Strategy** - How do you plan to conduct outreach to users, promote the campaign, and engage the crowd.
- **Prepare communication materials** - This may include emails and [Saved Replies](#) templates for moderators.



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)

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