



Framing the Big Picture

Innovation Planning Workbook



ABOUT THE COURSE

Introduction

This workbook is the first in a series designed to guide you through creating a crowdsourced innovation program. Its framework will support your organization's goals to:

- Engage stakeholders
- Solve challenges
- Establish the building blocks for success

Innovation is an iterative process and so is innovation planning. You may have insights by the end that impact earlier portions. Adjust your answers and strategy as your program takes shape.

A Practical Approach to Building a Robust Crowdsourcing Program

- Collaborate with leadership and key stakeholders to set organizational objectives.
- Define success metrics.
- Formulate and refine your problem statement to arrive at a clear problem to solve.
- Identify your participant and solver community.
- Develop a strategy to present the problem effectively.

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OBJECTIVES

Formulating an innovation campaign starts with integrating organizational objectives.

The goal is to build consensus between key leaders, sponsors, decision-makers, and partners. Recognize and include their unique perspectives and priorities.

First, define the different objectives for stakeholders at each level.

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

Establish the strongest positioning of your program by linking goals and metrics back to the organizational mission, vision, principles, and strategy.

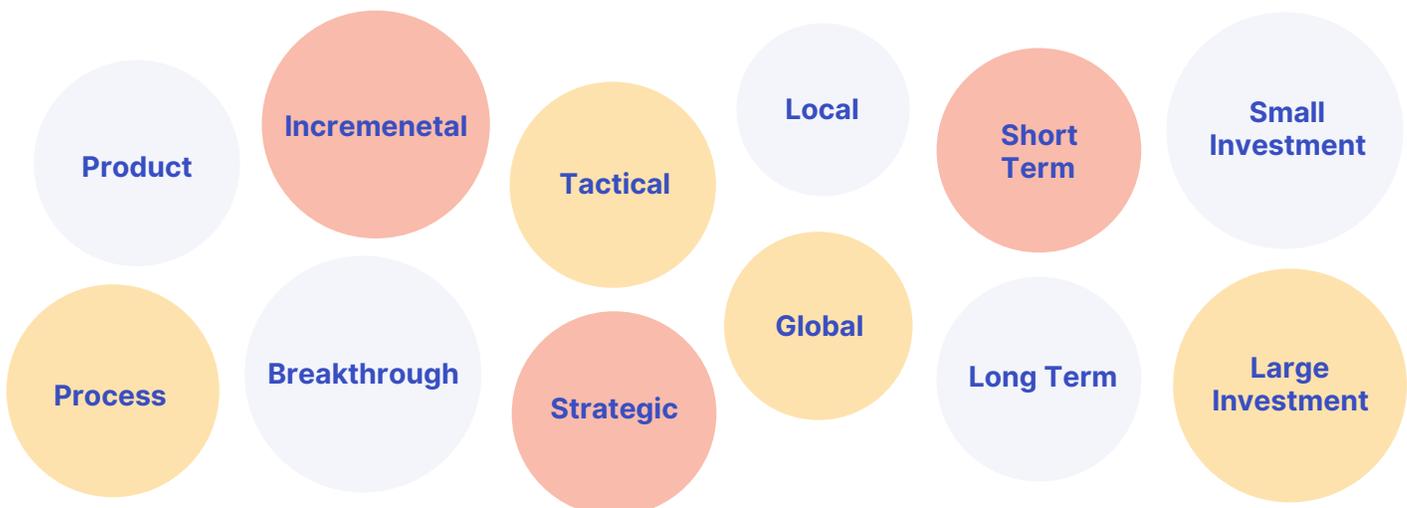
A clear and comprehensive understanding of objectives will help you:

- Shape an impactful and engaging problem statement
- Drive 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

Articulate what type of innovation you are targeting.

Are you aiming to collect ideas, improve or optimize a business or system, or invest in transformational breakthroughs? Each has a different strategy and workflow.

Additional attributes to consider when defining your innovation target:



METRICS

For each objective, there must be a metric, or at least a picture of success.

- Plan and define how you will determine whether these objectives were fulfilled.
- Consider both quantitative and qualitative metrics.
- Storytelling with data is key to conveying the outcomes and impact.

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, identify the current baseline and specify any quantitative or qualitative values. Then articulate the target value for success.
- A pilot project or formal survey may help you discover baseline values and set reasonable goals.
- Track progress from the pre-launch phase to closing, then 6 months and up to 5 years after.



Strategic Tips

- Work from an inventory of existing solutions.
- Note the pros and cons, which lead to defining the goals for the problem you want to solve or solutions you are seeking.
- Share this with participants in the campaign brief or other supporting documents. Then you won't get repeats of what has already been done, resulting in new and novel responses.
- Describe, define, or illustrate what would be different in the most successful scenario.

If this is your first time running an innovation program, consider your first metrics proposal as a working draft. The key is to begin thinking about success metrics early. You can always revise your metrics and targets as you learn more and adjust the program strategy.

EXAMPLE OBJECTIVES AND METRICS



	Success Metrics	Current Value	Target Value
Stakeholder: Innovation Management and Comms teams Objective: Participation in IS platform	Frequency of idea submission	5 posts per week	10 posts per week
Stakeholder: Innovation Management Team Objective: Core innovation	# Implemented ideas	3 ideas implemented per quarter	6 ideas implemented per quarter
Stakeholder: Innovation Management Team Objective: Transformational innovation	# Ideas tested	10 ideas implemented per quarter	100 idea implemented per quarter
Stakeholder: Senior Executives Objective: Fulfill Mission or Vision	You will likely have a metric for impact for each implemented idea	Baseline is idea-specific	Target is idea-specific
Stakeholder: VP Sales Cliente Objective: Increased Conversion From Prospect To	Conversion rate	10%	20%
Stakeholder: VP of Human Resources Objective: Increased Employee Engagement	Employee engagement score	30	40
Stakeholder: CEO Objective: Increased Revenue	Revenue	\$5 million	\$8 million



DEFINE YOUR OBJECTIVES AND SUCCESS METRICS

It's your turn to fill in the worksheet.
Identify key stakeholder, objectives, and target metrics.

	Success Metrics	Current Value	Target Value
Stakeholder: Objective:			



DEFINING THE PROBLEMS TO SOLVE

When you have a clearly defined problem, the crowd can submit a multitude of diverse solutions that can drive innovation around developing new products, processes, or services.

Innovation Problem Statement:

The problem statement is the question or challenge you will pose to the crowd. Sometimes the problem statement is called the **Challenge Statement** or a **Call to Action**.

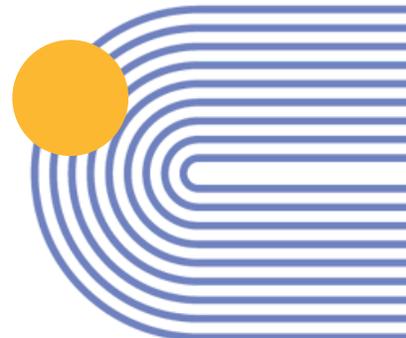
- If you have a goal, write it down. If you do not write it down, you do not have a goal - you have a wish.



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

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

- Review problems that have surfaced through feedback channels to develop a list of possible issues to address.
- Prioritize the list based on how crucial the problems are to your organization.
- Refine the prioritized list with input from the target population. It is critical to include members of the organization or group that experience the pain point you are trying to address.
- Alternatively, you can run a “discovery campaign” on IdeaScale to crowdsource input from stakeholders. Stakeholder input will help you pinpoint exactly what the concern is so you determine precisely how to frame the problem and desired outcomes.



INNOVATION PROBLEM STATEMENT

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

1 Define the target audience of participants and solvers.

The target population includes anyone who is impacted by this problem and the people who benefit from a solution.

It is critical to take into account each group's needs, motivations, and priorities; all which help better define the problem and encourage the most relevant and impactful ideas.

2 Clearly identify what the participants are trying to accomplish.

- It is best practice to take stock of your existing ideas and solutions when defining a problem.
- An example is to conduct research and interviews with those who experience the problem in order to gain insight.
- You can then translate these discoveries into measurable outcomes with an envisioned “picture of success.” Finally, develop metrics for this vision that have concrete, measurable outcomes that will indicate degrees of success.

3 Constraints or a narrow scope are advantageous.

A common mistake in crowdsourced innovation is creating problem statement or question that is too broad or open-ended. Structure and constraints provide clear parameters for engagement from the crowd, a sense of timeliness or urgency, and excitement that the hosts are actively moving toward prototyping or implementation.

- Constraints provide a framework for how to think about or engage with a question or topic.
- Constraints are guidelines for your crowd so their contributions map to your definition of success.





INNOVATION PROBLEM STATEMENT

Initial problem statement for crowdsourced innovation

- Provide solutions for [target population][action verb][constraint or qualifier].
- Example: Provide solutions for **staff** to **commute to the university** with **only renewable energy or self-powered transportation 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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- Imagine what success looks like when this problem is solved. Use a drawing or narrative.
- Define success metrics. Create a list of outcomes that indicate a problem is solved or has potential solutions.
- Rephrase the problem statement as needed based on your insights from the inventory of needs, existing solutions, and your vision for success. A guideline:



Share/provide/submit solutions, ideas, concepts or proposals for [target population][action verb][constraint or qualifier].

PROBLEM STATEMENT EXAMPLES

“If we are going to be part of the solution, we have to engage the problems.”

~ Majora Carter, Sustainability Advocate

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 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

- Identify or propose ideas or solutions to provide free, convenient, and regular diabetes screening for at risk residents who do not have easy access to a physician or medical facility.

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

- Share your insights on barriers or other factors that affect millennials in achieving leadership positions and roles in [location] or [situation].
- By leadership roles we mean board membership, committee membership, and workplace campaign leadership.

Concept

"I'm new to the [resource development function] at [company]. We're in a headquarters town for a lot of corporations, and one of my goals is to reach out to all the corporate social responsibility (CSR) leads at the companies and I'd love to know how companies can 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

Offer ideas or solutions to bring corporations in [location] to work together and with [company] on a shared community-wide CSR priority.

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

- Help us identify alignment between the CSR missions of these many corporations and the mission of [company] and find opportunities where we can all collaborate to make our community a better place.
- Help us identify skills-based volunteer opportunities for employees to address the shared corporate social responsibility priority.

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

Innovation Resources

Recommended Websites, Podcasts, & Books



Websites

IdeaScale Blog ideascale.com/blog

Innovation Management: innovationmanagement.se

Innov8trs innov8rs.co

Global Innovation Management Institute: giminstitute.org



Podcasts

How I Built This wonderly.com/shows/how-i-built-this

Innovation Meets Leadership innovationmeetsleadership.com/podcasts

The Innovation Show theinnovationshow.io/episodes

The Killer Innovations Show killerinnovations.com

WIN/WIN: Women in Innovation Podcast womenininnovation.co/podcast



Books

The Wisdom of Crowds, by James Surowiecki

Revolutionizing Innovation: Users, Communities, and Open Innovation, by Dietmar Harhoff (Editor), Karim R. Lakhani (Editor)

Pirates in the Navy: How Innovators Lead Transformation, by Tendayi Viki, Holger Nils Pohl

Creating Value with CO-STAR, by Laszlo Gyorffy and Lisa Friedman

Innovation Accounting: A Practical Guide for Measuring Your Innovation Ecosystem's Performance, by Dan Toma and Esther Gons

Crowdsourcing, by Jeff Howe

A Guide to Open Innovation and Crowdsourcing: Advice From Leading Experts, edited by Paul Sloane



IdeaScale Professional Services: ps@ideascale.com



ideascale.com

