



Messaging and Communications

Innovation Planning Workbook



Innovation Planning: Messaging and Communications

Developing an effective communications plan is critical to every crowdsourcing and innovation initiative. Core components of your program's communication plan include:

- Program goals
- How to participate
- Rules, review criteria, benefits, and incentives
- Plans for selected/winning ideas and solutions

A successful innovation leadership team includes communication experts with writing, marketing, graphics, video production, data analytics, and social engagement strategy skills. These colleagues will help frame the innovation challenge in a way that invites the broadest, most diverse audience possible to participate. Your communication experts works with the program and campaign team at key times, including:

- During pre-launch to planning to design visuals and write copy for the program, create a marketing and outreach plan, and invite participants.
- Throughout the active crowdsourcing program to engage the community.
- Post-campaign to collaborate on gathering data, metrics, and stories that help convey the lessons and successes.

This framework gives you elements to customize to your organization's voice and brand.

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This image shows a single sheet of white paper with horizontal blue ruling lines. The lines are evenly spaced and run across the width of the page. There are no margins, text, or other markings on the paper.

- Greta Thunberg
(Environmental Activist)

KNOW YOUR AUDIENCE: YOUR COMMUNITY

Begin building your communications plan by getting in the mindset of your solver audience.

The innovation program will determine WHAT you are doing and WHY you are doing it, which leads to creating a strategy to identify WHO will participate.

Make a list of all the potential skill sets, interests, areas of expertise, and people who are impacted by the problem you are seeking to solve, or crowd you want to engage. Ideally, you will go beyond the usual and obvious to expand to the potential and adjacent people, departments, organizations, and other demographic criteria that broadens your community.

Create multiple profiles (persona, avatar, etc.) for ideal participants:

- Roles within the organization or outside of it.
- Ability to access the community through computer, mobile, single sign-on or social logins.
- Life and work factors that could impact the ability to complete tasks within the timeline.
- Region of the country or world (translation available, time zones for deadlines).
- Potential contribution: Early adopter, idea creation, individual contributor or team member, evaluator, judge, etc.
- Driving factor or incentive: Explore the why -- what emotional, intellectual, societal, or financial aspects will encourage them to participate and share their best ideas and solutions.
- How to reach them: Personal invitation, email, social media, newsletters, webinars, group events, etc.

Group:

Role in organization/unique perspective:

Group size:

Available time, resources:

Location, Access:

Unique skills, insights:

Desired action:

Best method of communication

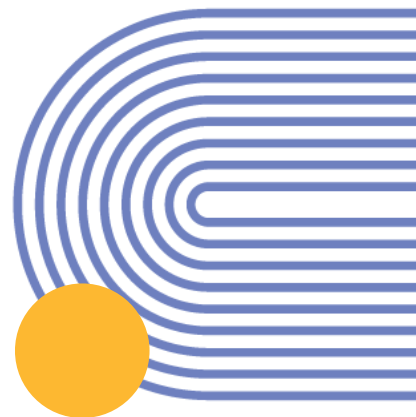
Value to participation:

Participant/Solver Community:

The individuals and teams of people who contribute knowledge & skills to the collective intelligence of a crowdsourcing innovation project.

Communities are:

- Internal: A closed organization
- Curated: Internal + Invited
- Open: Anyone, anywhere



KNOW YOUR AUDIENCE: LEADERSHIP, STAKEHOLDERS

Leadership and other stakeholders such as budgeting committees, board members, R&D, human resources, etc., will have a different set of goals and perceive program value differently than your community of idea and solution submitters. Build your program in alignment with leadership perspectives to gain full value, buy-in, and program longevity.

Stakeholders and their role in program development:

Their priorities and goals:

Current method for receiving and identifying new ideas:

What kind of ideas/concepts are they looking for:

Idea requirements to prove value:

Budget and allotted resources available:

Value proposition:

Best method for updates:

“I learned to always take on things I’d never done before. Growth and comfort do not coexist.”

-Ginni Rometty
(Executive Chairman, IBM)

KNOW YOUR AUDIENCE:

REVIEWERS, MODERATORS

Reviewers and evaluators, including moderators, will identify and manage ideas and solutions through your designed workflow. They will be dedicating valuable time and talents to make your program successful, so it's important to keep them engaged and invested.

Identify this team early. Diversify beyond the stakeholders, experts, or people in power and include people who view and think about things differently. An innovation program needs **people who can both deeply understand the problems and imagine possibilities for solutions beyond what has always been done.**

Team (for each stage of evaluation):

Role:

Time commitment:

Value to participation:

Team (for each stage of evaluation):

Role:

Time commitment:

Value to participation:

This team contributes to setting the evaluation criteria for ideas to move into each advanced stage. Identifying the requirements early and communicating it effectively will help your participant community propose ideas aligned with your program goals.

Contextually relevant submissions make evaluation smoother and more effective.

“Learning and innovation go hand in hand. The arrogance of success is to think that what you did yesterday will be sufficient for tomorrow.”

-William Pollard
(Nuclear Physicist & Priest)

VALUE PROPOSITION

Let's workshop your concept into a problem statement and call to action. This will allow you to convey the value of your campaign to your crowd. Craft a few separate problem or call to action statements for each campaign to keep the content you share dynamic and interesting.

A strong call to action or problem statement will convey the key emotional and practical points :

- How and why the program is relevant to the solver audience.
- A solution's value to individuals, an organization, a community, etc.
- Incentives for participating, eg. impact, recognition, like-minded and like-skilled community building, financial or other value rewards, etc.
- How to participate, including clearly defined and communicated rules, timelines and dates, and evaluation criteria.

Concept:



Problem statement or call to action:

Using the profiles you developed previously, turn that call to action into a unique value proposition for each group.

Idea Submitters:

Leadership:

Role Player Group:

Role Player Group:

“Every great dream begins with a dreamer. Always remember, you have within you the strength, the patience, and the passion to reach for the stars to change the world.”

-Harriet Tubman

IDENTIFY COMMUNICATION CHANNELS

Brainstorm and plan all methods and channels for communicating to the known and potential participants in your innovation program. Plan to personally invite a group of people to get the ideas and solutions started. Make it easy for participants to invite others and share their contributions.

Email: Newsletter, Digest, Mailing List, Signature Lines

- List and email curated by:
- Email format:
- Deadline:

Offline: Posters, Signage, Monitors

- Location(s) to display:
- Permissions, requirements, restrictions:
- Distribution:

Social, Network, Chat

- Dedicated intranet, social media channels:
- Leadership social media handles:
- Collaboration tools (Teams/Slack, Google Suite, Intranet):

Meetings + In-Person

- Upcoming opportunities:
- Who will present:
- Who will they present to:

Dedicated Events

- Event type (in-person or online), location:
- Date(s), Audience:
- Presenter(s), special guests, presentation, additional materials:

Blogs, News Sources, Advertisement, Website

- Owned channels (your blog, website, Teams/Slack):
- Release schedule:
- Others who will share your content:

Other Ideas

MEASURE AND TRACK SUCCESS

Optimize your efforts over time by measuring the effectiveness of your crowd communications. You have limited time and resources to dedicate to communications, so make them count.

Work with your marketing or communications team to identify what tracking and measurement tools you can access:

- Time spent creating content and sharable materials
- Measure potential audience and any relevant demographics (location, job role, diversity factors)
- Webinar or meeting participation, digital engagement, outreach click rates and open rates, social shares.

Use IdeaScale's on-site tools:

- Connect your Google Analytics account to your public IdeaScale Community
- Create member groups for segmentation
- Monitor activity with the Reporting & Analysis Dashboard and Leaderboard for number of submissions, votes, comments, and frequency of logins at key times.

Tips:

- A/B test using different calls to action, images, incentives.
- Look at the ratios: # to receive the message >> # to view the message >> # to click through to the community >> # to sign in >> # to participate >> # to add value.
- Measure volume of participation and look for concentrations of activity in segments (location, job description, etc.). Pivot to engage a more diverse pool of solvers.

Build check-ins into your timeline to monitor your statistics and determine which activities result in the most value for your campaign. Keep what worked and change what didn't. This might mean dedicating more time to communications, or dedicating more resources to one highly effective activity.



CONTINUOUS ENGAGEMENT

Your communications and engagement strategy begins before launch and does not end when submissions close. These are important milestones for your program, and it is also important to update your community as ideas move through the stages and lifecycle.

The more invested your community becomes—in the stages they participate in and those that they don't contribute to directly—the more ownership they'll feel over the process and the output.

Next, you'll work on the communications and outreach schedule. Included in this workbook are sheets for each milestone:

- Pre- or early-development engagement and buy-in
- Early or soft launch audience research and messaging
- Launch announcements across channels
- Progress updates, measured and recurring
- Deadline reminders
- Celebrating wins and long-term impact tracking

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

— Jim Rohn
(Entrepreneur)

COMMUNICATIONS SCHEDULE

Pre- or Early Development Engagement & Buy-in

- Create a plan to engage and consistently communicate with stakeholders.
- Identify key people who are impacted by the problem and possibly already attempting solutions.
- Plan and organize relevant materials and messages before you share.
- Make a checklist of what needs to be accomplished and who signs approvals before you share.

Date:

Channel(s):

Message:

Date:

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COMMUNICATIONS SCHEDULE

Early Announcement or Soft Launch

- Identify communications channels.
- Schedule messaging to key groups, early adopters, program supporters, influencers.
- Create baseline metrics and goals, then tracking program.

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COMMUNICATIONS SCHEDULE

Launch Announcement

- Cover your plan: Who, what, where, when, why, and how.
- Double check all links before you go live with social, emails, newsletters, and internal postings.
- Do a post-launch site/campaign review with IdeaScale staff within 24 hours.
- Be prepared to work with program managers to address questions and unforeseen issues.

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COMMUNICATIONS SCHEDULE

Progress Updates

- Check the idea submission, comments and idea time in stage metrics.
- Assess emerging trends and make plans for anything that needs to pivot.
- Communicate with internal stakeholders on metrics and any decisions.
- Communicate with participants/solvers and share relevant information.
- Encourage participation with voting, comments, etc.

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COMMUNICATIONS SCHEDULE

Deadline Reminders

- Be clear and precise with times (including time zones), dates, any links, and answers to questions so that participants can be successful.
- Repeat on all media and communications channels where you announced the launch.
- Highlight any incentives or motivations to encourage more participation.

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COMMUNICATIONS SCHEDULE

Celebrate Wins (+long-term impact tracking)

- Look for all the opportunities to make note of what worked and how people positively contributed. Thank them, include them in recaps, announcements, and any follow-up plans.
- Award the finalists, selected ideas, winning solutions, effective teams, and those concepts that made it through the process. Use the IdeaScale Leaderboard to support your recognition.
- Track your top performers, ideas, or solutions in 3, 6 and 12 months, and up to 2-5 years to see how the ideas or solutions have evolved and impacted the organization or person or team who participated.

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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



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