



Team & Crowd Engagement

Innovation Planning Workbook



ABOUT THE COURSE

Team & Crowd Engagement

This workbook is part of 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 building blocks for success

Begin with recruiting an excellent team to manage the innovation project.

- Teamwork, collaboration, accountability, and engagement are key to the process.
- A participant outreach and engagement strategy is essential for driving the crowd to join the community to submit ideas and solutions.
- Implemented ideas (from incremental improvements to new products to transformative processes) are the valued outcome and currency reflecting your definition of success for this project.

In this Team & Crowd Engagement workbook, you will:

- Build an effective and responsible innovation team to launch and manage the project.
- Encourage a culture where everyone contributes to the initiative with enthusiasm.
- Outline a plan for engaging the crowd and interacting with the team and project goals.

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BEST PRACTICES FOR TEAM & CROWD ENGAGEMENT

Expert 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 who will participate in your crowdsourcing initiative.
- **Frequency.** Send out at least one item of communication every 3-5 days during the core ideation phase.
- **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 acquire the most value from your community.
- **Respond and Facilitate.** Budget time for your community moderators to respond to each idea and facilitate discussion about 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 the crowd to participate with their own strengths and interests for quality engagement. Some will be eager to submit ideas or solutions. Others will be more comfortable voting or commenting on ideas. Do not require that an idea submitter must also be responsible for implementation.
- **Celebrate.** Advertise and promote the 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
(Steel Industry Tycoon)

TEAM ROLES AND RESPONSIBILITIES

Innovation is a team sport. In this section, we define some team roles and responsibilities for you to consider. Programs have a team of 2-20+ people whose work and expertise shapes the crowdsourcing initiative.

Executive or Campaign Sponsor is the face of each campaign. These are the leadership figures with the authority, legitimacy, and credibility in the eyes of your team and target solver population to make a call to action and later ensure winning solutions are prototyped or implemented. It is often advantageous to make this person a spokesperson for the 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 influencers.

Main Contact or Community Owner is the liaison between your organization and IdeaScale.

Community and Campaign Administrators have admin rights in the IdeaScale system. Administrator rights include extensive community management capabilities. The time commitment is approximately 20 hours to set up your community and first campaign and 10 hours of configuration for each new campaign. This includes discussing content with other roles.

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 valuable discussions about ideas. Moderators can approve, merge, and edit ideas, approve comments, and move ideas between stages. For setting expectations, see page 7 for more on budgeting your time investment.

Subject Matter Experts can be organized into groups to control their participation at different stages or control their ability to see different campaigns. The group features are 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 7 for more on budgeting your time investment.

Idea Owners take responsibility for the project management and development of promising ideas. Idea owners, or implementors, might be partners, sponsors, or community members. The key is that implementors are the people who will bring ideas and solutions to life. Idea owners are assigned by a campaign's moderators to select ideas.

Legal Contact (if applicable) It is important to involve a legal department if the campaign has specific rules, terms of participation, or incentives, prizes, or contracts that will be awarded. For example, in governments, there is often a policy, act, or statute that allows an agency or office to engage in public crowdsourcing, and with that are operational and reporting requirements.

YOUR INNOVATION TEAM

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 person hopes to get out of the engagement. Some people may play several roles.



| 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

The top questions for planning an innovation crowdsourcing campaign on IdeaScale are:

1. How many people do I need to manage the idea flows for one or several campaign funnels?
2. Depending on the campaign's length, how much time will they each need to fulfill their role?

See below for a quick estimate. It is important to understand the factors that go into this estimate:

- Size of the full potential audience that will be invited (It could be in the tens of thousands, or 50-100 for curated, internal groups.)
- Percentage of this target audience that actually joins the solver community. An industry rule of thumb is 10% for public facing campaigns and higher for employee targeted campaigns.
- Of that 10%, the proportion of community members that enter ideas is generally one-third (1/3).
- Factor the complexity of your idea submission form and workflow. A large number of required submission questions can decrease the number of submissions but you may get richer detail. Proactive communicating the details of your campaign will boost participation.

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. Consider:

- 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 messages, messengers, channels, 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 and motivation?

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



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. Also, see the workbook “Messaging and Communications” for more details.

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

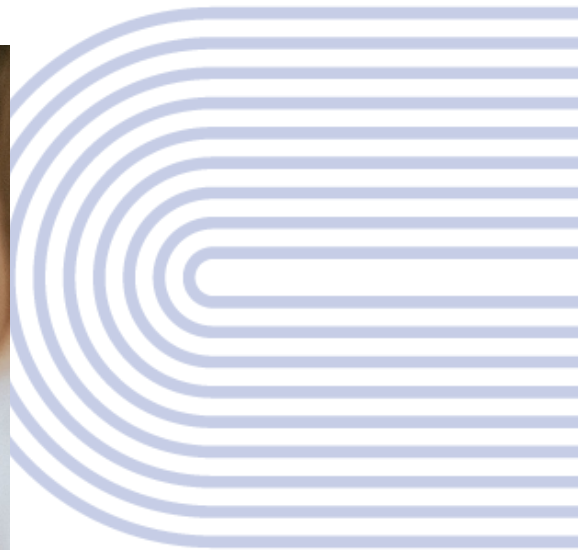
Get to the point quickly. This can be the most difficult component to balance, especially when telling a story or trying to convey emotion. However, it’s important to be concise and clear when you are battling for attention not only online, but with other work priorities.

Be open and honest. Transparency is especially important and creates a sense of trust within the group. Explain what you will do with ideas and solutions and set expectations with goals.

Be emotive. Emotionally driven, compelling content tends to drive more engagement. Back it up with facts, statistics, and explanations. Build a strategy that can get “heads nodding” and activate both the analytical brain in partnership with powerful ways that connect with why people care. Too much data, or self-serving reasons (for example, the company must save money or you’ll be out of jobs) should be used sparingly or users will tune out. Authentic, emotive voices that connect the “why” and the “what” of your project are what will drive people to act.

Tell a story. The best messages are delivered in the form of a story -- written, visual, or auditory. Stories help a potential participant better understand the problem to solve and builds empathy with the target population you aim to help. Use varied types of media for a diverse audience.

Include topical references. When possible, it helps to include context and 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
- Moderator replies and frequency idea stage changes
- Plan and Resources

Out of software community, your leadership:

- Call to action, invitation for ideas and solutions
- Mode of communication
- Frequency of communication
- Celebrating successes
- Follow-through to manage, test, and implement

Channels (choose at least 4)

- In-person meetings
- Group meetings
- Company Town Hall meetings
- Social Media (including blogs, LinkedIn, etc.)
- Podcasts
- Press Release
- Posters, postcards, print
- Newsletters
- Promotional videos
- MS Teams, Slack or other internal channel
- Email: Internal system or broadcast and notifications in IdeaScale

Tactics for viral growth

- Idea authors share their ideas
- 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, video, or audio



KNOW YOUR AUDIENCE DRIVE ENGAGEMENT

Know your audience.

Make an effort to understand who is in your crowd. Create a persona/avatar for potential participants from every sector that is directly involved with the problem, to those who are adjacent with skills that are transferable to solving the problem or contributing ideas. Who on the outside of the circle is a creative thinker and problem solver that could join.

Research and articulate what is important to your audience, what motivates them, and what interests them. Get a general understanding of their schedules and availability.

Describe what the crowd gains from participating. Consider intrinsic value in the form of bragging rights, incentives, awards, being part of an interest-based or skilled community.

Drive engagement.

Is the problem statement relevant to this audience?

Does your crowdsourcing campaign have a sense of urgency for your participants?

What incentives, monetary and non-monetary, or rewards can be put in place to drive participation? Examples of non-monetary incentives: opportunity to present the selected ideas or winners to leaders or at a conference, a LinkedIn reference from a 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?

Brainstorm a variety of options to publicly celebrate success, recognize participation, and individual and team contributions. Commit to doing them at waypoints throughout the program.

Communicate the planned outcome for selected ideas and solutions.



Innovation Resources

Recommended Websites, Podcasts, & Books



Websites

IdeaScale Blog www.ideascale.com/blog

Innovation Management www.innovationmanagement.se

Innov8trs <https://innov8trs.co/>

Global Innovation Management Institute: <https://www.gim institute.org/>



Podcasts

How I Built This <https://wonderly.com/shows/how-i-built-this/>

Innovation Meets Leadership <https://innovationmeetsleadership.com/podcasts>

The Innovation Show <https://theinnovationshow.io/episodes/>

The Killer Innovations Show <https://killerinnovations.com/>

WIN/WIN: Women in Innovation Podcast <https://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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