# Idea Management for Implementation

## Innovation Planning Workbook

# ABOUT THE COURSE

## Introduction

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:

- Create a process to sort submissions
- Review and assess ideas, concepts, and solutions presented by the community
- Develop a plan for campaign management
- Establish the building blocks for success

The most exciting part of an innovation initiative is when you get to take action. In this workbook, you will learn about innovation funnels with a workflow and customized stages. Optimally designed funnels will help you decide which ideas have potential to be developed into solutions.

## Innovation Planning:
# Idea Management for Implementation

A Practical Approach to Building a Robust Crowdsourcing Program

## Table of Contents

IDEASCALE
Professional Services

# PREPARING FOR IMPLEMENTATION

Implementation plays a pivotal role in the success of crowdsourced innovation initiatives. It's a crucial phase where organizations have the opportunity to turn **collected ideas** into **tangible outcomes**. When you act on the ideas generated, you not only reap the benefits of the crowdsourcing endeavors, you also foster a stronger connection with an engaged and enthusiastic community.

Here are **three best practices** to focus on when planning for implementation:

**1** **Run low-risk, crowdsourced campaigns to identify new cost saving opportunities.**

One remedy for organizations that do not have the resources to implement ideas generated from campaigns is to run a cost-saving campaign. Commit to implementing top ideas for cost savings. The savings from the selected ideas can be invested back into the crowdsourced innovation program and invested in the selected ideas of the subsequent campaigns. This approach can help organizations that have "cold feet" by removing a layer of commitment before seeing the ideas.

**2** **Communicate a campaign's ground rules by envisioning ideas your organization would love to fund.**

Imagine an idea that would be completely supported and another that is utterly unacceptable to the organization. What makes these ideas different? Describe the criteria for an idea to be eligible for funding. Detail these criteria at the outset to set expectations and guide users toward proposing actionable ideas. In this way, you commit to implementing ideas that meet your standards, not those that fall short. Additionally, the idea submitters will understand early on why certain ideas are chosen to move forward.

**3** **Clarify how ideas will be managed prior to launching the campaign.**

To increase the probability that ideas will be implemented, try to sponsor a campaign that is already tied to a funded initiative to gather ideas on how that initiative will be executed. This focuses the organization on a known priority and reduces doubts about how selected ideas might be implemented.

Some organizations solicit ideas for solving a problem but are not in a position to implement them. For example, a non-profit might solicit ideas to solve a climate change problem; however, it might not be able to implement the ideas without a government policy or support from partners. In these cases, we recommend describing how top ideas might be used to shape future initiatives. Clarify how ideas can be developed once resources are available. Help your crowd understand how ideas will be considered even if they might be selected for development at a later date.

These best practices can inform how you design and manage your campaign's funnel.

**IDEASCALE**
Professional Services

# AN INNOVATION FUNNEL

A successful crowdsourcing campaign generates lots of ideas from the community. It also shows users a clear path from ideation to implementation through the use of an innovation funnel, which is a workflow that helps prioritize the most viable ideas.

- Promising ideas are advanced through a varying number of stages, with a few ideas selected to become solutions and ultimately implemented by the organization.
- An innovation funnel can include many stages depending on the goals of the campaign.
- Key stages can include Ideation, Prioritization, Team Building, Idea Refinement, Evaluation, Selection, and Project Implementation. These stages can be repeated with a timeline in mind.
- Include clear business criteria within each stage so your community understands why some ideas move forward while others don't. This provides predictability and transparency to your process and helps users submit better solutions.

IdeaScale empowers you to build a custom funnel for each crowdsourcing campaign. Here are some of the stages available to you:

**Ideate:** Collect ideas or solutions. The community can vote and comment on submissions.
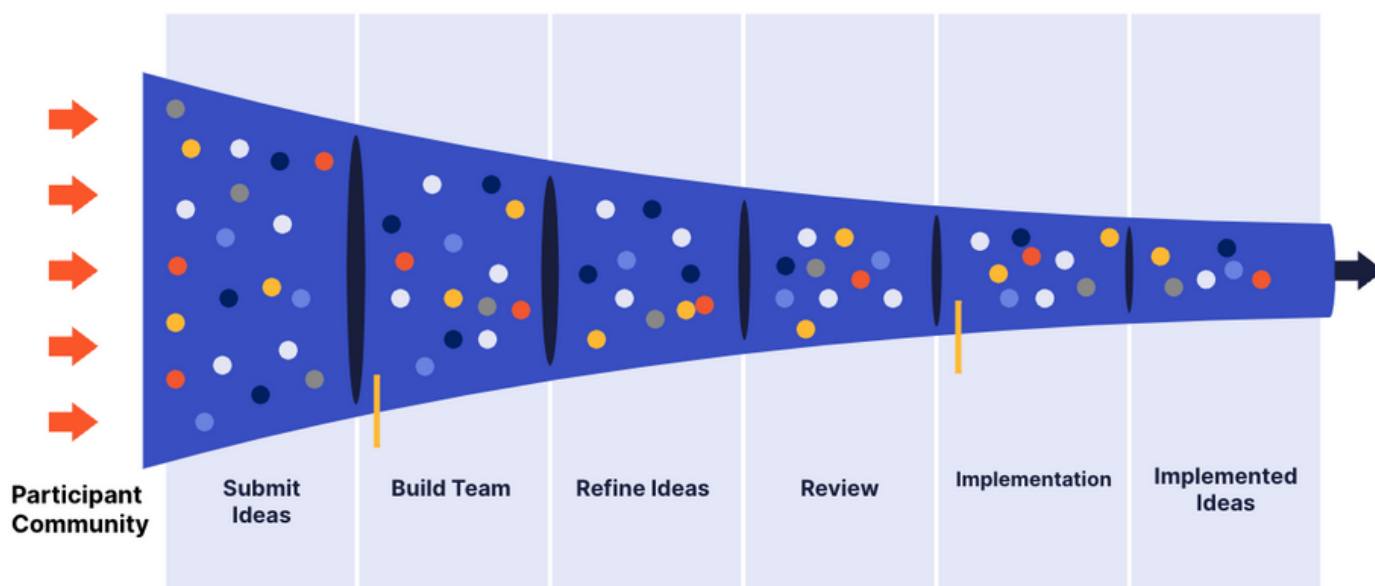**Build Team:** Participants can support an idea by creating or joining a team.
**Refine:** Designated users collaborate to refine an idea or to report back on prototypes and pilots.
**ReviewScale:** Leaders or moderators evaluate ideas with established criteria.
**Estimate:** Designated people or groups can estimate the cost and value of each idea.

Ideas can also be labeled as selected, implemented, or assigned a custom label to inform the community about ideas' status. The key is to create a funnel that communicates how ideas are being evaluated while balancing the campaign's timeline and off-platform activities.
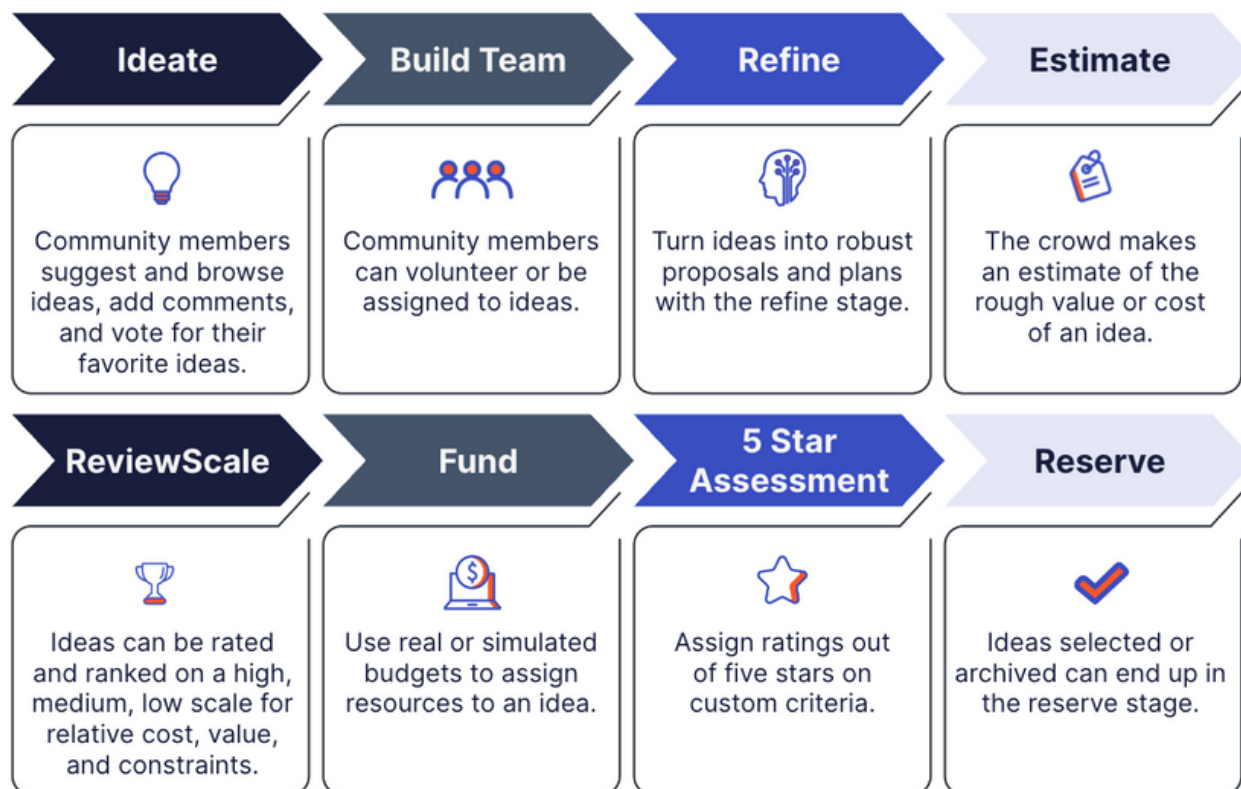
## INNOVATION FUNNEL AND STAGES



Participant Community | Submit Ideas | Build Team | Refine Ideas | Review | Implementation | Implemented Ideas

IDEASCALE
Professional Services

# IDEATE AND BUILD TEAM STAGES

When creating your innovation funnel, you will choose from several modular IdeaScale stages that can accommodate any level of public or private settings that invite broad participation and/or small-group collaboration.

### All About Stages

| Ideate | Build Team | Refine | Estimate |
|---|---|---|---|
| Community members suggest and browse ideas, add comments, and vote for their favorite ideas. | Community members can volunteer or be assigned to ideas. | Turn ideas into robust proposals and plans with the refine stage. | The crowd makes an estimate of the rough value or cost of an idea. |

| ReviewScale | Fund | 5 Star Assessment | Reserve |
|---|---|---|---|
| Ideas can be rated and ranked on a high, medium, low scale for relative cost, value, and constraints. | Use real or simulated budgets to assign resources to an idea. | Assign ratings out of five stars on custom criteria. | Ideas selected or archived can end up in the reserve stage. |

### Ideate Stage

The Ideate stage allows select users to vote and/or comment on ideas within the stage. This stage is often used at the beginning of a funnel for the crowd to prioritize ideas through voting and commenting, thus narrowing the list of ideas for smaller evaluation teams. This stage can also be used repeatedly. For example, "Ideate 1" can be for only commenting on ideas followed by "Ideate 2" used for voting on ideas. This stage can also be used as a placeholder stage and renamed to "Project Management," to store ideas while they are being worked on.

### Build Team Stage

The Build Team stage invites users to review ideas and decide whether to support an idea by joining a team tasked with developing it further. Ideas can also be submitted directly to this stage.

IDEASCALE
Professional Services

# REFINE IDEAS STAGE

It's difficult to judge the value of an idea just from a title and brief description. The Refine stage allows an idea submitter, idea owner, or a group to add supporting details to an idea.

You can include one or multiple refine stages in your funnel to further research and clarify an idea's impact and/or to identify any hidden assumptions. It is particularly useful when upfront investment is required to bring ideas to fruition. Some concepts for this stage:

1. **Target Audience, Problem, or Needs:** Whose needs are directly met by the implementation of this idea? Clearly describing the end-user will help you to articulate the need and prove the value of the idea.
2. **The Team:** Who is needed to make 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.
3. **Project Plan:** 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 (this can be linked or attached as well)!
4. **Solution:** 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.
5. **Benefits:** How do you anticipate this idea benefiting key stakeholders in quantitative or qualitative ways? If this idea is implemented, what does a successful implementation look like? Examples of quantitative benefits include reduction in materials, supply costs, service costs, labor productivity improvements, or impacts on operating income. Examples of qualitative benefits include an increase in customer or employee satisfaction and quality improvements.
6. **Outstanding Needs:** What resources or information do we need to make this idea successful? 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?

**To configure this stage, choose from 5 templates (SWOT, COSTAR, Lean Business Canvas, Business Model Canvas, or Jobs to be Done) and/or create your own unique set of refinement questions.**

**IDEASCALE**
Professional Services

# REFINE IDEAS STAGE, *continued*

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?

_____

_____

**Solution**
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 information do we need to make this idea a success?

_____

_____

IDEASCALE
Professional Services

# NOTES:

_____

_____

_____

_____

_____

_____

_____

_____

_____

_____

_____

_____

_____

IDEASCALE
Professional Services

# REVIEWSCALE (EVALUATION) STAGE

The realities of budget and staff restrictions will force you to narrow your focus and prioritize the ideas that are most feasible and have the greatest return on investment. The ReviewScale stage makes scoring ideas consistently against weighted factors easy.

- **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 (members, partners, students, faculty, 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 might be great to do everything, your budget probably doesn't allow that. So, you can 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.

---

- **The impact ratio is calculated by the sum of value factors/sum of cost factors.**
- **Administrators can adjust the weight of the questions in the ReviewScale Dashboard.**
- **Remember to define the key by explaining what each button (NA/Low/Medium/High) means in your campaign's context.**

---

**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? ✓

80% of customers welcome this feature. ✏️

NA   L   M   H

**Key**

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

**IDEASCALE**
Professional Services

# NOTES:

---

---

---

---

---

---

---

---

---

---

> **"True genius resides in the capacity for evaluation of uncertain, hazardous, and conflicting information."**
>
> Winston Churchill
>
> Former Prime Minister, UK

**IDEASCALE**
Professional Services

# ASSESSMENT (EVALUATION) STAGE

The Assessment stage also makes it easy to score ideas consistently against your established criteria. When setting up your assessment criteria, it is helpful to incorporate the answers captured in a prior Refine stage with current organizational priorities. Some assessment criteria to consider include:

- Feasibility
- Viability
- Desirability
- Impact
- Novelty
- Urgency
- Fit with mission
- Fit with vision
- Fit with purpose
- Fit with principles

**How effective will it be?**

☆ ☆ ☆ ☆ ☆     ☐ NA

Add Assessment Note

**How we calculate our ratings**

| ★★★★★ | Strongly Agree |
| ★★★★☆ | Agree |
| ★★★☆☆ | Neither Agree nor Disagree |
| ★★☆☆☆ | Disagree |
| ★☆☆☆☆ | Strongly Disagree |
| NA | Not applicable |

Take time to ensure that your assessment questions and the meaning of each star/key are congruent to the rating system and understandable to the Assessment team.

> "If you are not willing to risk the unusual, you will have to settle for the ordinary."
> — Jim Rohn
> Entrepreneur and Author

**IDEASCALE**
Professional Services

# REPORT ON OUTCOMES

Your organization's leadership and campaign sponsors will need to know the return on investments (ROI) for the crowdsourced innovation program and its campaigns. Furthermore, the crowd will be eager to witness the outcomes of their creative and intellectual contributions to the program.

Plan ahead to capture important quantitative and qualitative data at appropriate points within your funnel. This can be done using the IdeaScale Idea Submission From, Refine, or Estimate stages as follows:

- Report on lessons learned while testing, validating, or implementing an idea. [Use the Idea Submission Form or 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]

**Examples of business value questions include:**

- Estimate any positive impact on operating income.
- Provide real data or estimate any reduction in operating expenses.
- Beyond the initial investment, estimate the calculate the cash flow over the next year.
- Describe the social or environmental impacts this solution will have on daily operations.

By asking idea submitters and teams to estimate or project business value, you will be able to export the data and curate reports that summarize the total value of your crowdsourced innovation program's campaigns and ideas.

> **"You cannot manage what you cannot measure."**
> **~ Unknown**
>
> **"Not everything that can be counted counts, and not everything that counts can be counted." ~ Albert Einstein**

IDEASCALE
Professional Services

# CAMPAIGN AND FUNNEL PLANNING

Three workflow stage templates come with your software. Below is an example of a "moderate" workflow, designed for seeking solutions to low-to intermediate-risk innovation efforts.

| Stage Title and Function | Description of Actvities and Permissions in This Stage. |
|---|---|
| **Ideate** | Participants submit, vote and comment on ideas. |
| **Build Team** | Participants are invited to join teams to develop their ideas. |
| **Refine** | Participants or teams refine ideas into stronger value propositions. |
| **Assessment** | Subject matter experts or other leaders evaluate the ideas for selection. |
| **Fund** | The community or decision makers can pledge or invest funds, or time to ideas they support or can commit to. |
| **Reserve** | Solutions or ideas are moved to an archive or for future consideration. |
| **Selected Ideas** | Solutions or ideas have been selected for further development. |
| **Implemented Ideas** | Solutions are developed, live in practice, and celebrated for their value. |

# CAMPAIGN PLANNING TEMPLATE

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

**[Campaign Title]**

[Challenge Statement]

[Campaign Brief Details]

- Timeline
- Evaluation criteria
- Intrinsic value for the crowd, incentives, or rewards
- Implementation commitment on the part of campaign sponsor

**IDEASCALE**
Professional Services

# CAMPAIGN FUNNEL PLANNING TEMPLATE

Now it is your turn. Use the table below to create your own funnel using IdeaScale stages. You can review the <u>All About Stages article</u> for specific stage setting details. The goal is to understand when ideas should *persevere, discontinue or progress to the next stage*.

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

**IDEASCALE**
Professional Services

# CAMPAIGN AND FUNNEL PLANNING TEMPLATE

In this section, create a timeline with key actions 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 month to 1 week of prelaunch outreach**

Communicate and engage the crowd of potential participants

## Launch the Campaign

**2-4 Weeks for Idea Collection or Problem Solving Ideation**
Continue outreach to crowd

**2 Weeks for Voting and Comments**

**1 week for SME Evaluation or Judging and Idea Selection**

**1-6 months Project Management, Prototyping, 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
> Leadership Speaker and Author

IDEASCALE
Professional Services

# CHECKLIST

- **Problem/challenge statement  -** Identify who will benefit or be impacted by the problem and solutions. 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, support judges and engage the crowd.

- **Prepare communication materials -** This may include emails and Saved Replies templates for moderators.



> **"What is now proved was once only imagined."**
>
> **— William Blake**
> Poet and Artist

IDEASCALE
Professional Services

# 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** wondery.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
### Professional Services

**IdeaScale.com**