HOW-TO-GUIDE TO INNOVATION: IDEATION FOR IMPACT

By Gerard Harkin, Director of 3inno

'Ideation' is the creative process of generating and developing new ideas. Typically, it is considered a fun event with a feel good factor, but unfortunately these sessions frequently do not deliver against expectations. Done properly, ideation offers much more to participants than just some time away from the desk sitting on beanbags. It should play a role in getting people to think in new ways, creating ideas that will have a positive impact on the company's performance and building stakeholder engagement. Unfortunately, more often than not, issues with the planning, delivery or follow-up to ideation can lead to less than optimal results.

How can you improve the success rate of ideation?

Clients often ask us for advice on how to get the most out of these sessions. Our response is this: preparation, preparation, preparation!

In this 'How to Guide', we address this crucial stage of innovation, which in our opinion is often overlooked or skimmed over. We have arranged our advice in the form of a checklist of questions, something you can quickly work through to ensure that you are well prepared for upcoming workshops and better organised to achieve successful results. By no means is this intended to be a definitive guide to ideation preparation - you may simply not have time to tick all the boxes and, of course, no two sessions are the same. However, dipping in to the practical tips that follow should save you time and improve the quality of your sessions so that you get the most out of them.

Ideation Preparation

1. Be clear on the aims and deliverables

In the first place, **ask yourself why you need an ideation and whether you do actually need one at all.** By way of illustration, a client recently came to us looking for a way to generate fresh product ideas; her competitors had launched a new product, and naturally she wanted to respond with some winners of her own. However, after speaking with members of

her organisation, we discovered that they had no shortage of good ideas - their real issue was a lack of commercial focus. In their case, an ideation would have caused more harm than good.

It is important to **frame the problem correctly and clearly articulate it.** This sounds obvious, but you would be surprised how frequently the wrong challenge forms the input to an ideation. For example, imagine you need ideas for new ways to earn additional income so that you can enjoy a nice long holiday and de-stress from your demanding job. At first, the issue seems to be income related, but by zooming out and looking at the various levels of challenges, it becomes apparent that earning extra income may not be the real issue at all, and it would be wiser to identify ideas for stress management techniques or opportunities for a different job / career path.

It is important to **clarify the end deliverables.** Think about the volume and types of ideas you are looking for, from incremental steps to breakthrough thinking.

Look at the ideas that already exist within the organisation - within the team, in other divisions, from customers, suppliers, forgotten Rembrandts in the research and development attic, etc. You may be surprised by what you find internally, and it will save you reinventing the wheel.

Think about the best way to get new ideas. For example, face-to-face workshops, using an online ideas submission tool, or through crowd-sourcing techniques. The choice you make will depend on a range of factors, such as available finances, how quickly you need the ideas, the participants' availability, the volume of ideas required, the type of problem to be solved, your corporate culture and geographic scope.

Know where to focus ideation in order to get best bang for your buck. For example, should you focus on the customer experience, business model, new service features, products, new customer segments, channel opportunities, value chain plays, new partners, brand enhancement or company capabilities? This point is overlooked in many ideations where too much time is

spent wandering in random directions rather than focussing on the areas where the best commercial ideas are likely to be discovered.

Always **have a planning conversation** with the owners of the challenge to understand their expectations. Identify what success looks like from both a rational and emotional perspective, uncover any hidden agendas, and brief them about the ground rules, tools, process and their role in the workshop.

Map out the post-workshop stages to ensure that prioritised ideas can be converted into valuable opportunities. It is always a mistake for a company to run a series of ideations without any follow up to further develop the ideas generated for commercial success. Not only will the ideas end up gathering dust in a bottom drawer, but future ideations are then likely to be met with resistance, e.g. "why waste our time - nothing happened after the last workshop".

2. Get the right people in the room
Handpick the right candidates based on the problem you are trying to solve and partially on stakeholder engagement requirements. You will need creative folk as well as people who can help build ideas, so opt for a diverse mix. In terms of the number of people, aim for a maximum of about eight participants per facilitator – the more people involved, the slower the pace and the lower the productivity. Ensure that you provide sufficient notice of the ideation so that participants can schedule the event in their diaries.

As to the question of whether you should involve **external** participants - such as subject matter experts or customers - we often do and it can be a real value-add. Make sure you brief them properly to avoid unexpected surprises, and consider the impact their presence will have on the workshop atmosphere.

Having a **visual artist** to sketch emerging ideas can add a real spark to the session – perhaps someone in the company is a budding artist?

Involving a key sponsor at the start and end of the workshop can be worthwhile and helps gain buy-in to the next stages of idea development.

3. Plan the process
As a rule of thumb, allocate one third of the time to generating ideas and the remaining two thirds to idea clustering, prioritisation and write up. Make sure you also plan for a sufficient number of breaks during the session.

Think about the most **appropriate parameters for clustering ideas and the criteria for prioritising** them, then preselect a core team to cluster and rank ideas. Many ideations overlook the importance of this stage, resulting in errors in the clustering and prioritisation, so take your time and do not rush it.

Prepare idea write-up guidelines to capture the essence of the prioritised ideas. Do not overwhelm the participants with detailed questions on business models and revenue projections – all that comes later – the first step is to define the idea. Some teams like to work together as a whole to build the ideas, others prefer to work in smaller groups or pairs.

A useful way of thinking about developing new revenue streams — Illustrative for a Gym
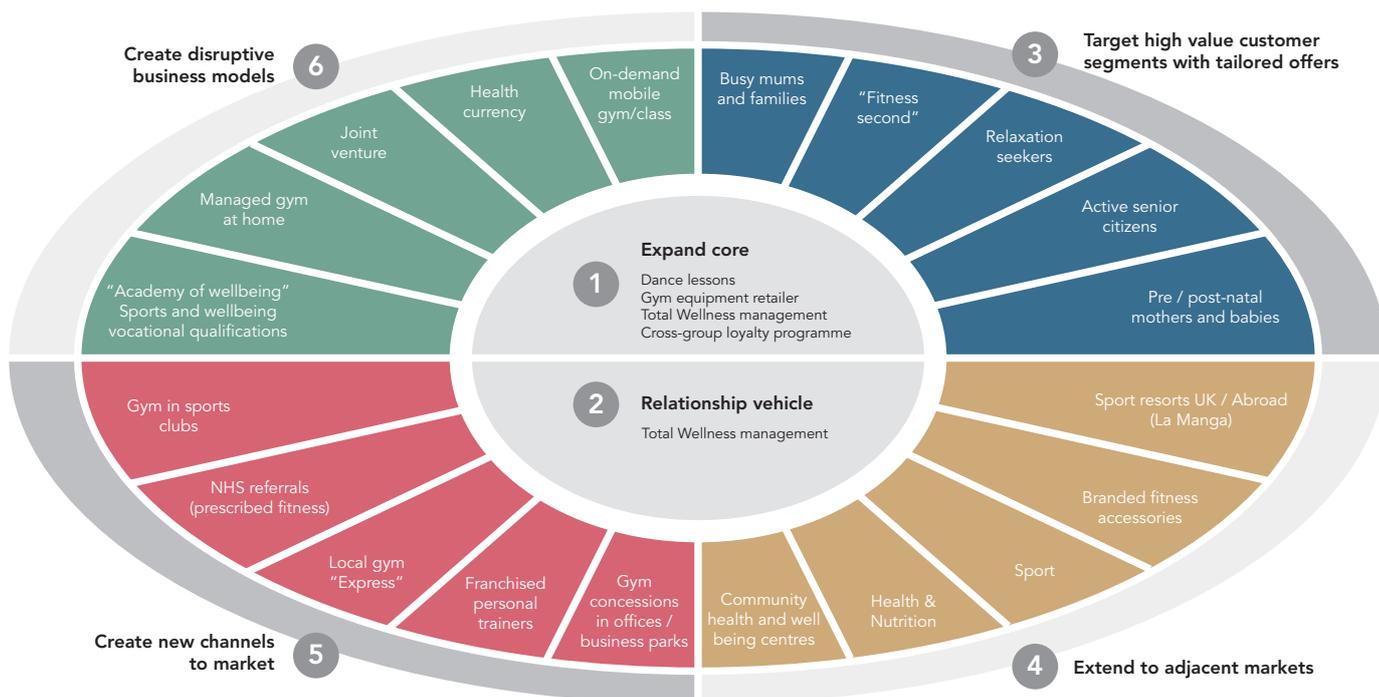
4. Select the right tools and stimulus

Prepare a handful of **key creative tools** and have a few others up your sleeve - you can never accurately predict the course of an ideation session, and you might have to pull extra tools from your hat!

Which tools to use depends on the type of challenge and the factors discussed above. For example, a session on new ice cream flavours with FMCG marketing staff will command different tools to a session on new technologies for food sensors with scientific staff. At 3inno, we often use our own suite of tools for revenue growth sessions. Fast paced creative spark type tools can work in all situations, but we often use them in specific consumer focussed ideations. Some aspects of Triz tools (a problem-solving, analysis and forecasting method derived from the study of patterns of invention in the global patent literature) are useful for technical challenges; and business models is a tool we apply to business model sessions. Put simply, scarcity of tools should not be an issue here as there are hundreds of tools to choose from; the trick is to select the right tools to maximise the likelihood of you getting the results you are looking for.

Prepare **inspiring stimuli,** such as colourful posters with images and content that can trigger ideas, video, music, etc.

Occasionally, the corporate culture, the participants' functional backgrounds and their position in the company influence the choice of tools and stimuli. For example, we recently held a workshop with senior scientific staff in a long established technical corporation and this required us to tweak our facilitation style and choice of tools somewhat to accommodate their rank and experience.

Make the environment conducive to creative thinking. Sometimes this is outside your control; for example, sometimes you cannot move the furniture around. In this circumstance, good stimulus material and props play an even more important role in shaping the atmosphere. It is often a good idea to think of a suitable exercise for the participants to complete prior to the session – this gets the ideas flowing before the workshop begins.

Identify the key beliefs and 'sacred cows' that could block idea flow. All organisations have these implicit assumptions about their business, the market or their customers; these findings can become valuable triggers in the workshop.

Compile an inventory list of all the materials you need to make the day a success. Attention to detail and getting the simple things right are important. If a facilitator forgets to bring post-it notes or gives dried-up markers to the participants, the session can take on the farcical, frustrating air of an episode of Mr Bean.

5. Have the right mindset

Last but not least, let's talk about the **attitude of the facilitator.** Some facilitators consider ideation a chore (and it shows in their whole approach!). They believe their job is 'to do creative stuff' to people. Successful ideations require a different mindset - you have to enjoy working with people, enabling their creative flow and being comfortable with ambiguity. Gut feeling has an important role to play, and should also guide the preparation, choice of tools and facilitation style.

By considering these ideation preparation steps when planning your session, we hope you will be able to maximise the impact of your ideations. In Part 2 and Part 3, we will tackle both the practical aspects of running ideation workshops and the key steps to complete immediately after the workshop in order to ensure the session generates the biggest impact.