



# Deliberate Innovation

Innovation Training Guidebook

Takeda

August 2023

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# The Purpose and Guidelines for this Document

**Dear Takeda Innovators:**

You have made it to the first stop along your innovation journey. The journey has been filled with tools, techniques and behaviors. And it can be challenging to remember precisely which technique to use and when to use it. With any journey, to arrive at your destination it will require practice and commitment.

To that end, we have organized an Innovation Guidebook to guide you. Think of this Guidebook as a reference guide that you can use to facilitate working sessions with your teams and/or lead creative problem solving/innovation sessions with your internal clients. The Guidebook explains the basic steps for each of the Innovation Behaviors and Tools. Plus, it includes facilitation tips and templates that you can use!

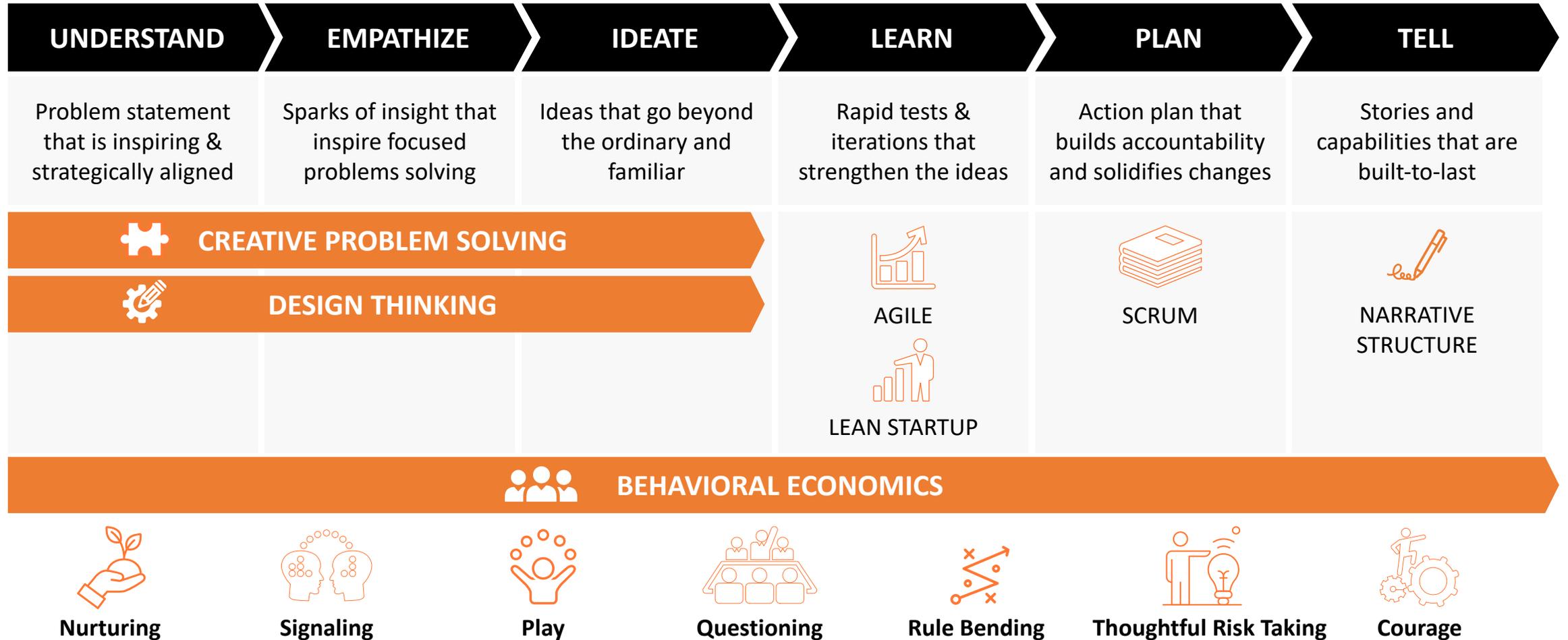
We encourage you to use this reference during your journey, and we hope you share with your colleagues along the way.

**The Deliberate Innovation Team**



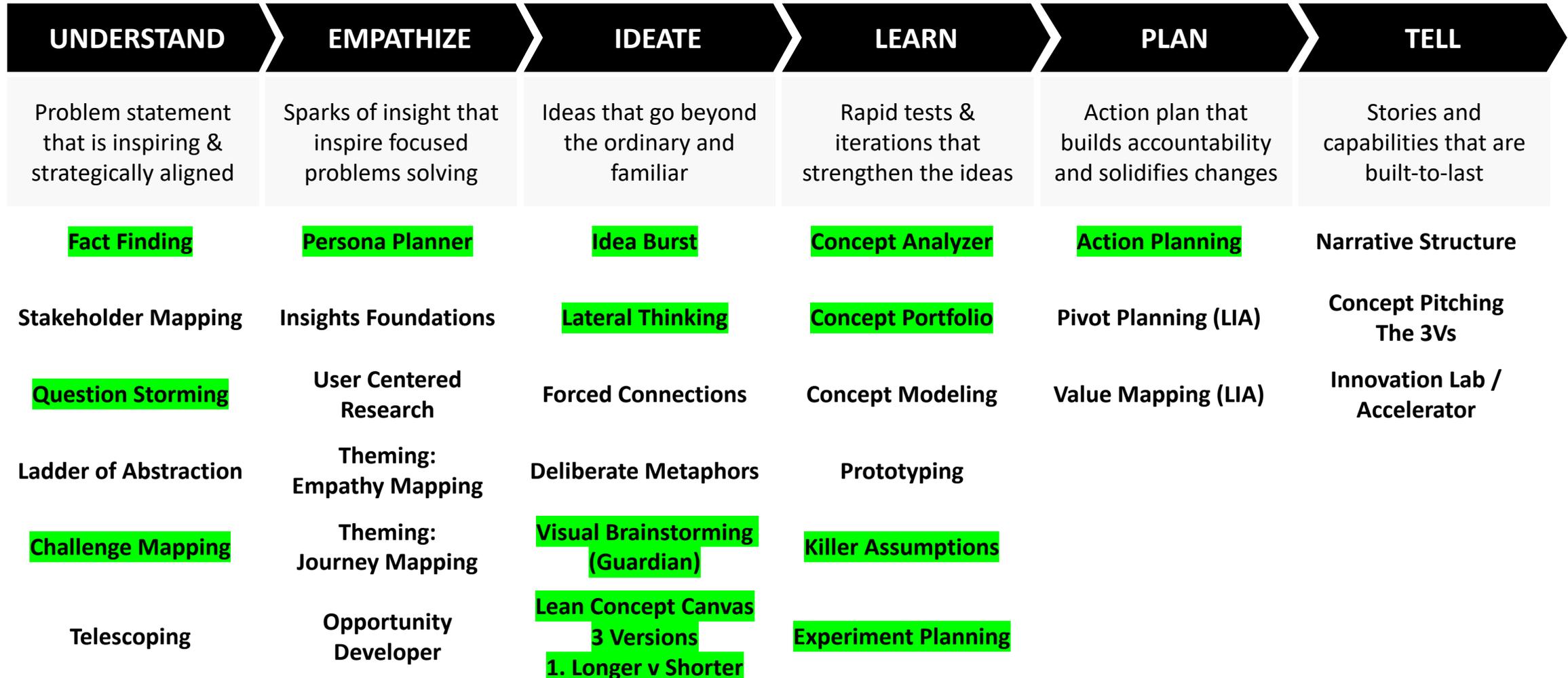
# The Deliberate Innovation Framework

This is the framework and roadmap



# The Deliberate Innovation Framework

The following highlighted tools were covered during our training journey.



# MODULE #1

## *Understand*





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## Understanding

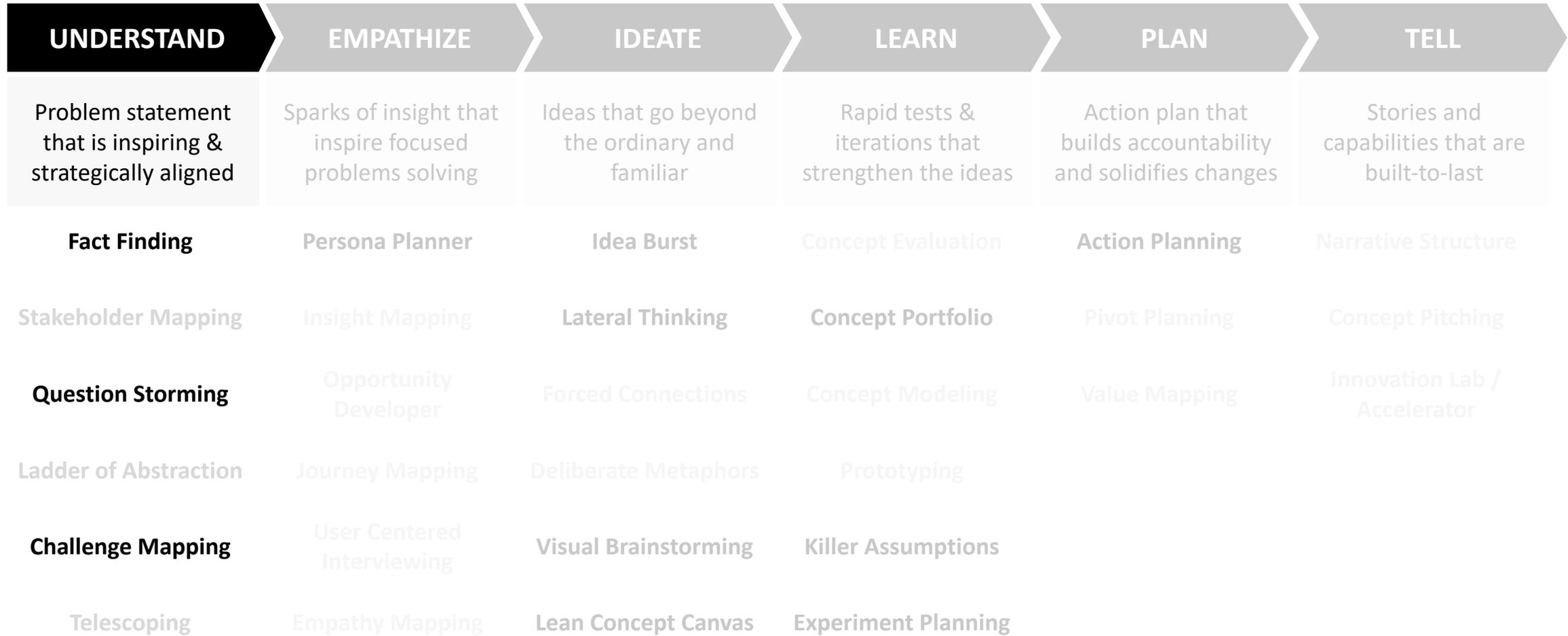
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is about digging deeper into your challenge by exploring the facts and hidden assumptions so that you can clarify the “fuzzy situation” and focus on the right question.



# The Deliberate Innovation Framework

This module will focus here on the framework.



# FACT FINDING



# Fact Finding

It is a method for gathering facts about our “fuzzy problem”, building deeper insight into our challenge and gaining alignment by asking and answering a series of questions.



# Fact Finding



## What It Is ---

Fact Finding is a method for gathering facts about a “fuzzy problem”, building deeper insight into our challenge and gaining alignment by asking and answering a series of questions.

## When To Use It ---

Fact finding is best used at the outset of any problem finding event. It provides a baseline of key facts that enable a preliminary understanding of a problem and/or client situation.



# How it Works

- 1** **Select** relevant starter questions from question categories
- 2** **List** an expansive array of facts to address each question
- 3** **Group** the facts and identify potential themes
- 4** **Discuss** facts to build understanding and alignment within the group
- 5** **Converge** on the most compelling themes to deeper explore



# What Makes a Good Fact?

- 1 **Easy to understand** – Be simple, concise and clear - an unknowing bystander would understand the gist. Try to minimize tribal language.
- 2 **Robust** – The fact answers the question in a complete way - you should be able to understand what it meant in 2 weeks.

## Example:

*Weak idea:* Paperwork.

*Robust Fact:* The amount of paperwork traffic creates confusion and disorganization.

- 3 **Concise:** Record one fact per submission.

If you're not sure if it's 2 separate thoughts...*"when in doubt, split it out"*

What would success look like to you if you could solve the problem?

Success would be winning over the hearts and minds of colleagues that don't believe we can make a difference

- 4 **Be Careful of Assumptions**
- 5 **Avoid Negativity and Fatalism**
- 6 **Diverge NOW...Converge LATER**

# How to Facilitate It

## Fact Finding

1

### SELECT

Choose a team member to facilitate

For 2 minutes, burst on facts in response to the first question

Repeat for all questions

2

### REVIEW & ALIGN

Individually review the facts for each question

Facilitator can ask for clarification on unclear facts and update post-it note.

3

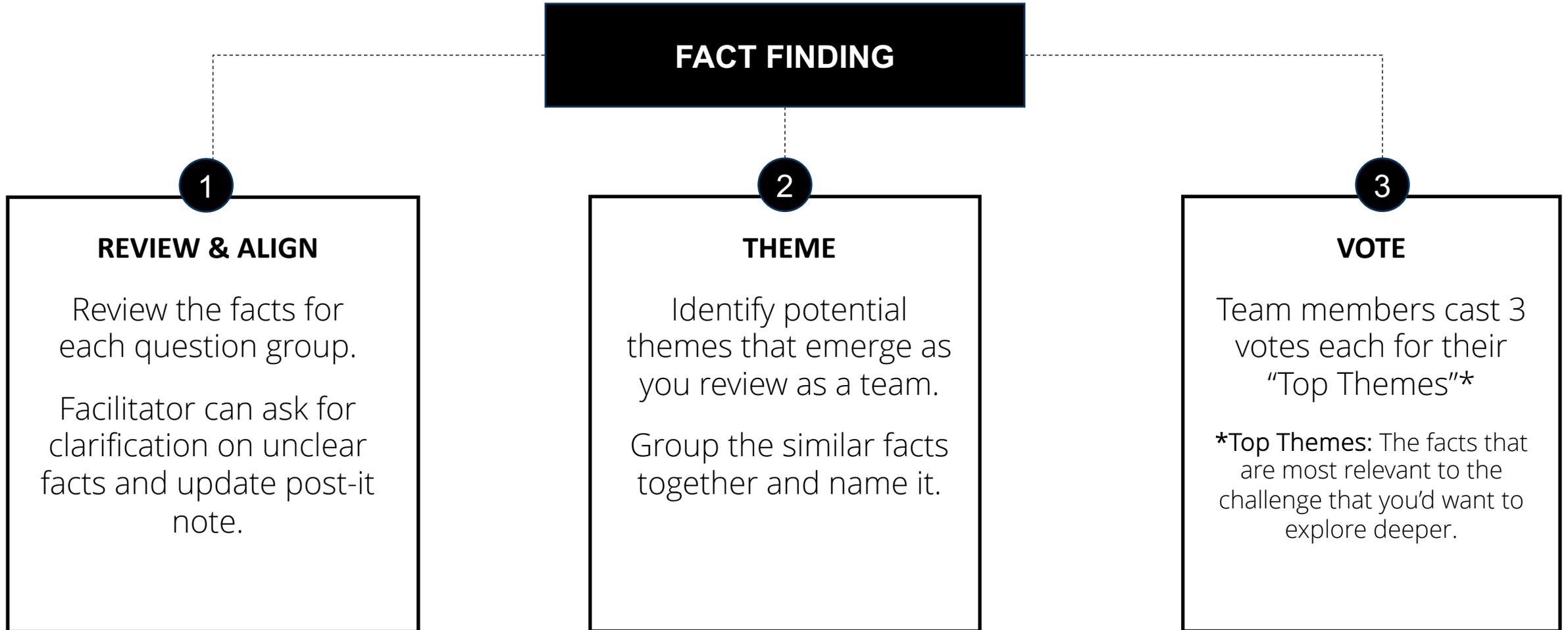
### VOTE

Team members cast 3 votes each for their "Top Facts"\*

**\*Top Facts:** The facts that are most relevant to the challenge that you'd want to explore deeper.



# Exercise Overview





# Top Tips

- **Fact Finding Mindset** – Remember this is an expansive exercise – Don't Judge the Facts
- **Beware of assumptions** – It's easy to skip over the facts when we hold a position
- **Remove the emotion** – It's easy to have a negative attitude towards a problem
- **Search for the Facts** – Facilitator should be using open ended question; Participants should be listening and providing concise answers
- **Design for the Exercise** – Don't let space constrain the number of facts!
- **Capture verbatims** – Opinions are OK. Need to source them (e.g., Dan thinks: "The Company is a great place to work.")
- **Converging vs. Diverging** – In the end, signal that we want to be reductive and think about the facts that were most important – this will help you reshape your challenge.



# Fact Finding Template

What will success look like at the end of the project?

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Voting Stars

Take a star and drag it to the edge of a sticky note you want to vote for.  
3 votes per person



Why is it important to tackle this challenge now?

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Voting Stars

Take a star and drag it to the edge of a sticky note you want to vote for.  
3 votes per person



What's one thing that is stopping us from demonstrating sustainability to our customers?

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Voting Stars

Take a star and drag it to the edge of a sticky note you want to vote for.  
3 votes per person



# QUESTION STORMING



# Question-Storming

is a design and innovation technique that focuses on generating questions rather than ideas in the early phases of a project.

The method turns your key facts into a series of HMW questions that enables the reimagining and reframing of the challenge.



# Question-storming



## What It Is

---

Question-storming is a design and innovation technique that focuses on generating questions rather than ideas in the early phases of a project. The method turns your key facts into a series of HMW questions that enables the reimagining and reframing of the challenge.

## When To Use It

---

Question storming is best used when a team is prematurely moving from problems to solutions. This happens at the outset of most projects / initiatives.

Question-storming applies the same properties used in brainstorming but instead it is used to generate alternate questions.



# How it Works

- 1** Select a relevant starter question or topic
- 2** Generate an expansive array of questions
- 3** Refine, Group and share the questions
- 4** Discuss the questions within the group
- 5** Select the most compelling questions to deeper explore



# How to Use It

## Question-storming

1

### DIVERGE

Bring over your top 3 Facts from Fact Finding

Question burst for 3 minutes individually on the 3 Fact themes

\* Remember to start your questions as “*How might we...*”

2

### CONVERGE

After completing the 3 rounds of question asking, individually select your favorite question from each round.

Facilitator should look for patterns and clusters.

3

### DISCUSS & VOTE

Facilitator should invite participants to cast defined number of votes on their preferred questions.

**Note:** You should have 1 selected question at the end.

As a team, rewrite your HMW Question





# Top Tips

- **Quantity over Quality** – Quantity begets quality in the long-run. Diverge on the questions. Focus on authoring and at a later point editing.
- **Defer Judgment** – Don't judge the questions until later.
- **Avoid Answering Questions** – Our tendency is to try to answer questions as soon as we pose them. Hold off on trying to answer, or solve, the question now.
- **Questions with Answers Embedded** – Try to avoid asking questions that include the idea inside the question. (e.g., How might we make a smoothie that hides the taste of vegetables?)
- **Laddering** – Build off your previous HMW question to prompt your next question. Use that to frame your next question.
- **Provocativeness** – The questions should be increasingly more surprising and provocative as you go along.



# Question-Storming Template

**What's one thing that is stopping us from solving this challenge?**

Fact 1 TBD

**Fact 1 Diverge (Question-Burst)**

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**Why is it important to tackle this challenge now?**

Fact 2 TBD

**Fact 2 Diverge (Question-Burst)**

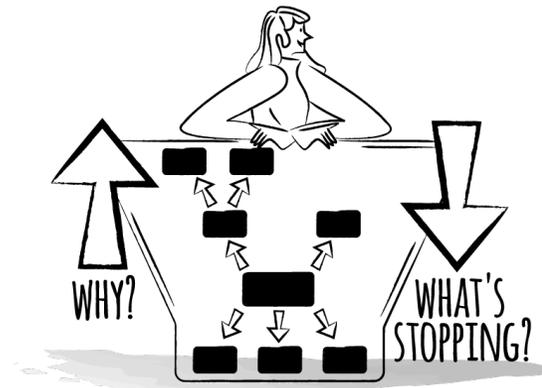
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**Individual converge**

Drag your top 2 questions here

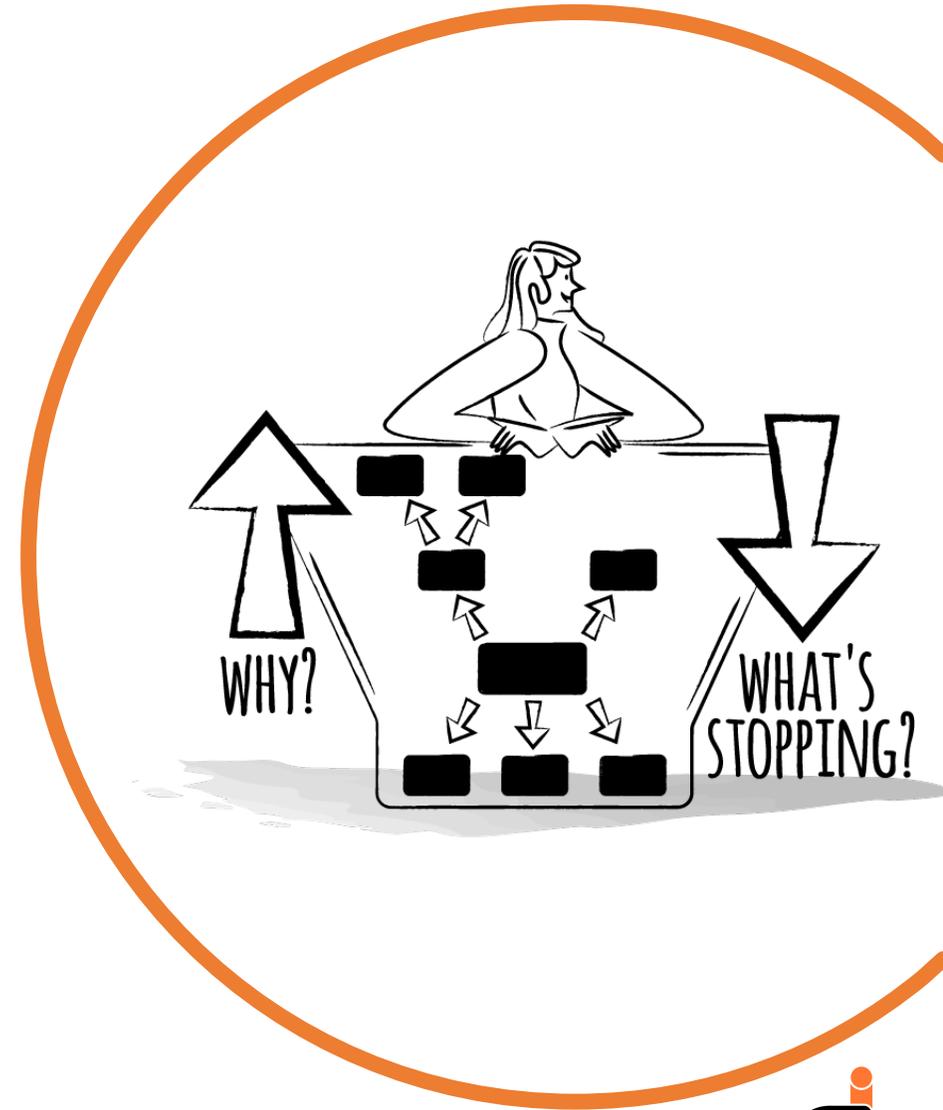


# CHALLENGE MAPPING

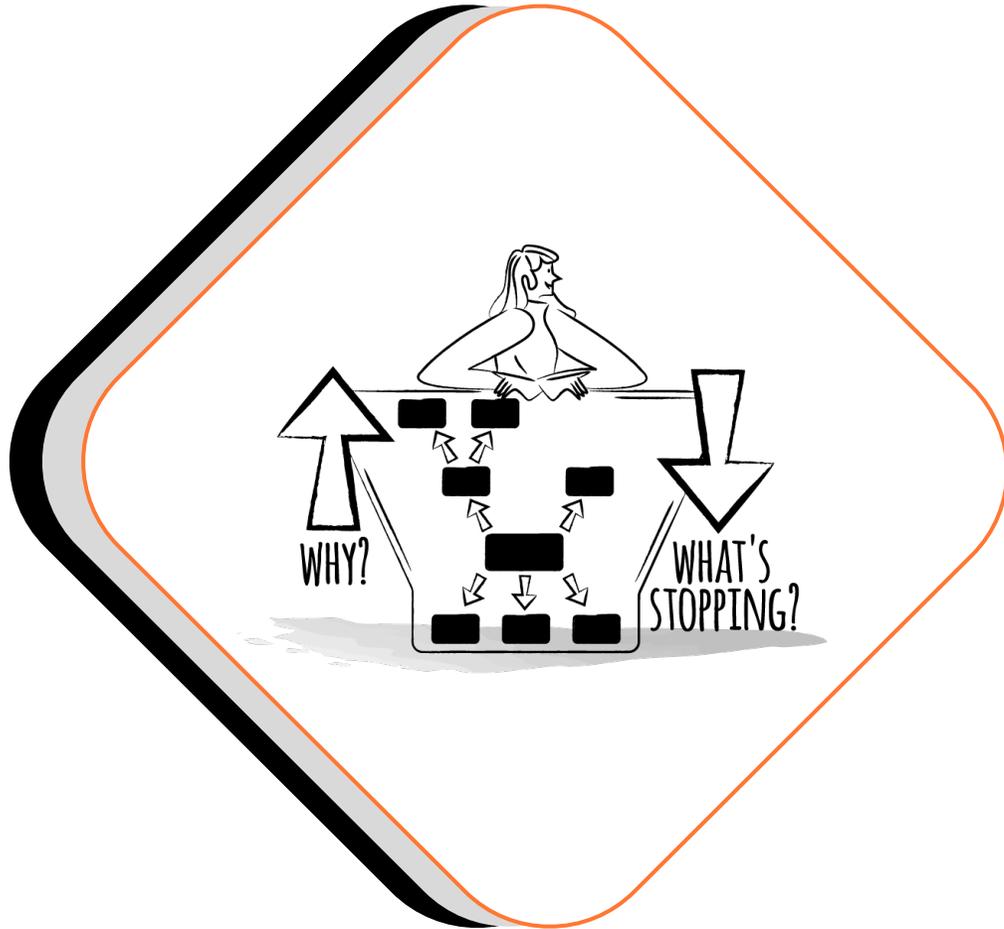


# Challenge Mapping

is a visual method of broadening and narrowing the problem statement in order to conduct deeper exploration so that we focus on the right problems to solve.



# Challenge Mapping



## What It Is

---

Challenge Mapping is a visual method of broadening and narrowing the problem statement in order to conduct deeper exploration so that we select the RIGHT question to answer.

## When To Use It

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Challenge mapping is best applied when you have a starting problem or opportunity statement, but you are not certain that this is the RIGHT question to solve. It is also a valuable tool to use when you would like to explore a wider array of questions while viewing in relation to other associated questions.

Mapping can be useful for strategic planning as well as customer pain point mapping.



# How it Works

- 1** Ask “Why might we want to..?” or What’s stopping us from...?”
- 2** Answer in a complete, simple statement
- 3** Transform the answer into a "how might we" (HMW) question
- 4** Expand the map by Asking and Answering one question at a time
- 5** Select the question that your team wants to further explore



# HOW

*How* instead of *What* invites  
problem solving

# MIGHT

*Might* suspends judgment  
and opens the door to  
possibility

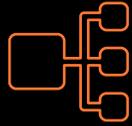
# WE...?

*We* implies collective  
action  
*"Do It Together"*



# How to Select the “Right” Challenge Question (the 4Ps)

## Placement



- Challenge is placed at just the right scope or level
- Broad enough to invite fresh solutions and not feel overly tactical
- Specific enough that you’re not “boiling the ocean” / can be actionable

## Precision



- Goes beyond a generic brand aspiration or performance goal
- Focuses on deeper unmet need or pain point

## Payoff



- Clear who the primary stakeholder is in the challenge
- Connected to a potential “payoff” / end benefit – (i.e., if we solved this challenge, might it deliver the vision of success you defined?)

## Passion



- The team is excited to work on the challenge
- Your sponsor/leadership team will be excited IF you solved the challenge



# Exercise Overview

## Challenge Mapping Exercise

1

### Team Breakout

Join your Team Breakout and Miro Board

2

### What's Stopping

As a team, generate several "Why" and "What's Stopping" cards

Try to go up/down 2-3 levels

3

### Group Alignment

Discuss and agree on the specific barriers that you want to solve for

4

### Test the Why

As a team, "test" your barriers to see if the barrier might address your challenge question.





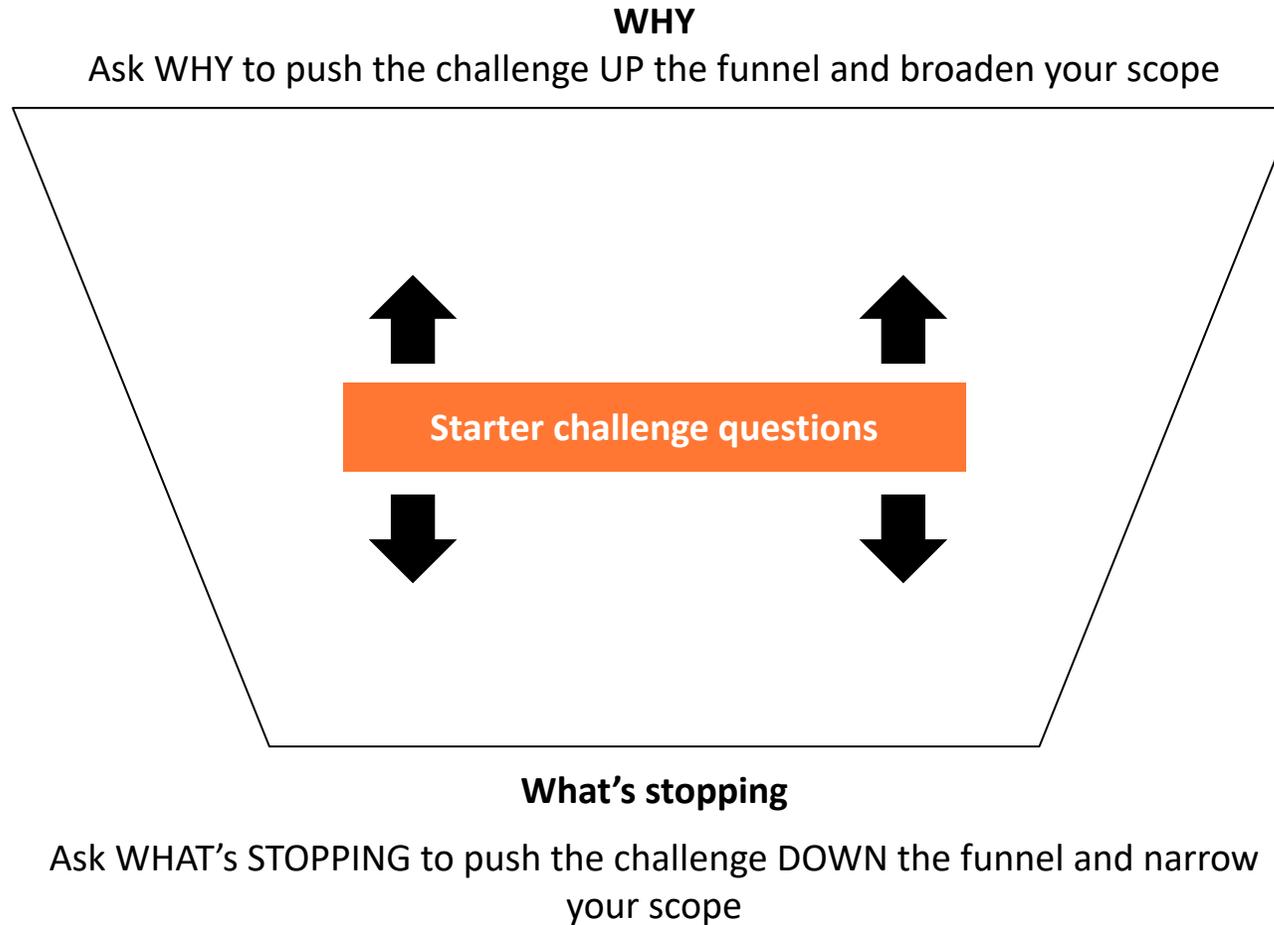
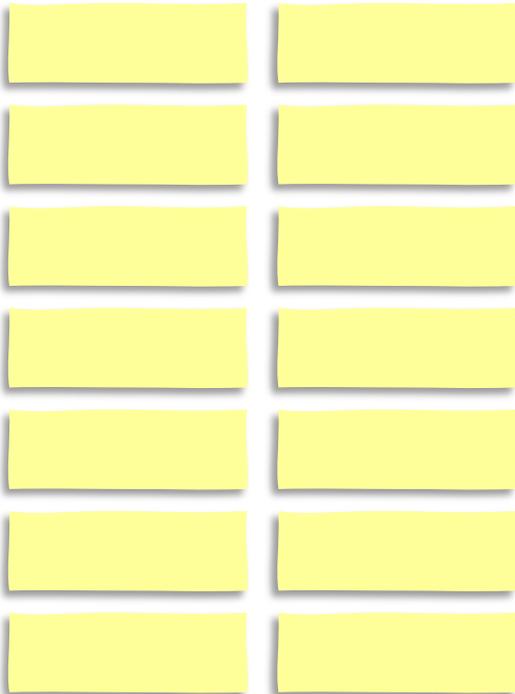
# Challenge Mapping Top Tips

- **Converging vs. Diverging** – The exercise starts as a divergent exercise and then becomes a convergent exercise.
- **Let the Facilitator Facilitate** – One person must lead the exercise; allow for the facilitator to ask questions and in return the facilitator will ask participants to help him/her place the post-its on the map.
- **Patience** – Take time to explore and ask questions before recording –be careful not to ignore participant input
- **Move the Map!** – We use post-it notes to record the barriers because they will likely need to be reorganized. It is normal to have to reorganize your map and move the post-its around as discussion progresses.
- **Double Barreling** - Don't solve multiple issues for multiple stakeholders.
- **Prioritization** – You will likely identify more than one challenge – prioritize which one(s) you want to solve imminently.



# Challenge Mapping Template

Drag these sticky notes into the funnel to answer the questions “Why” and “What’s stopping”



Place your top two questions here



# MODULE #2

## *Empathize & Insight*





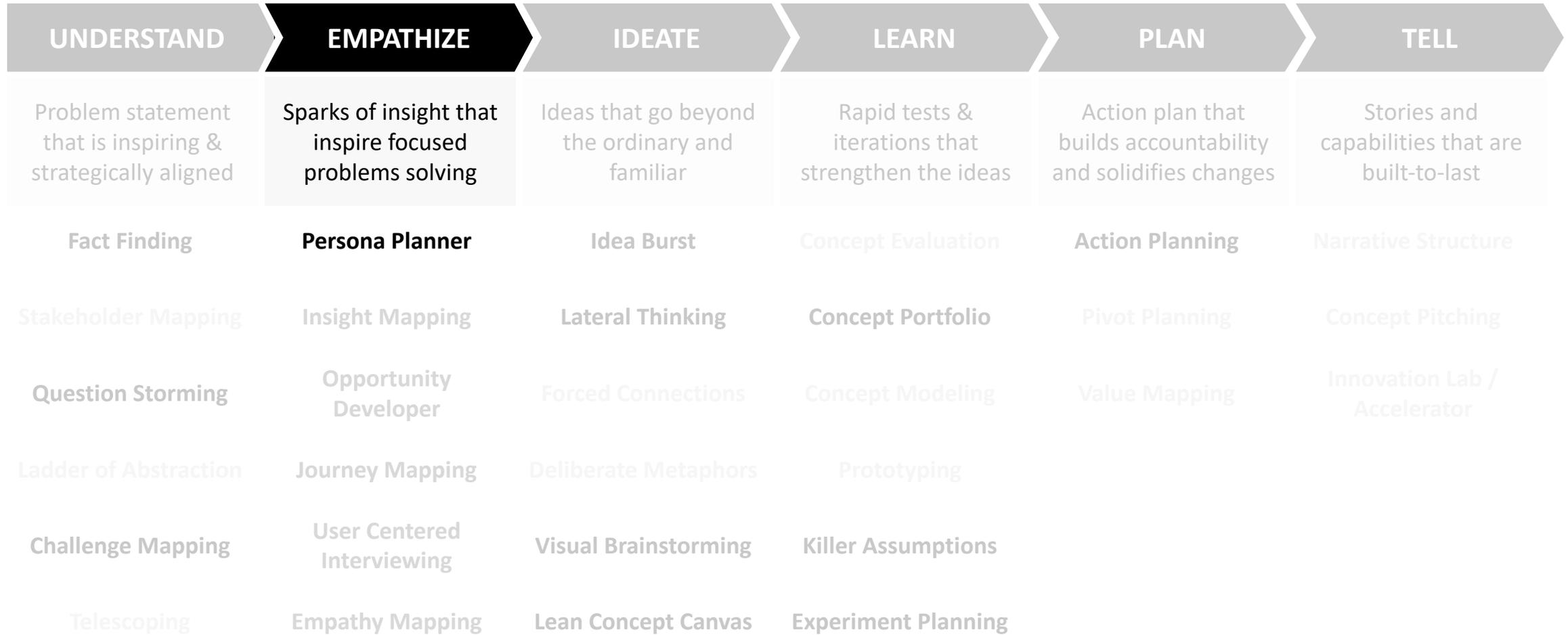
## — Empathize & Insight —

Is about building a deep understanding by “walking a mile in their shoes.” By understanding their deeper beliefs, needs and wants we can both delight our customers AND unearth opportunity areas for the business.

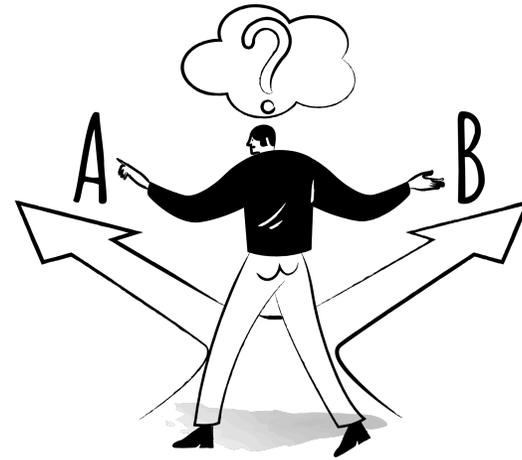


# The Deliberate Innovation Framework

This module will focus here on the framework.



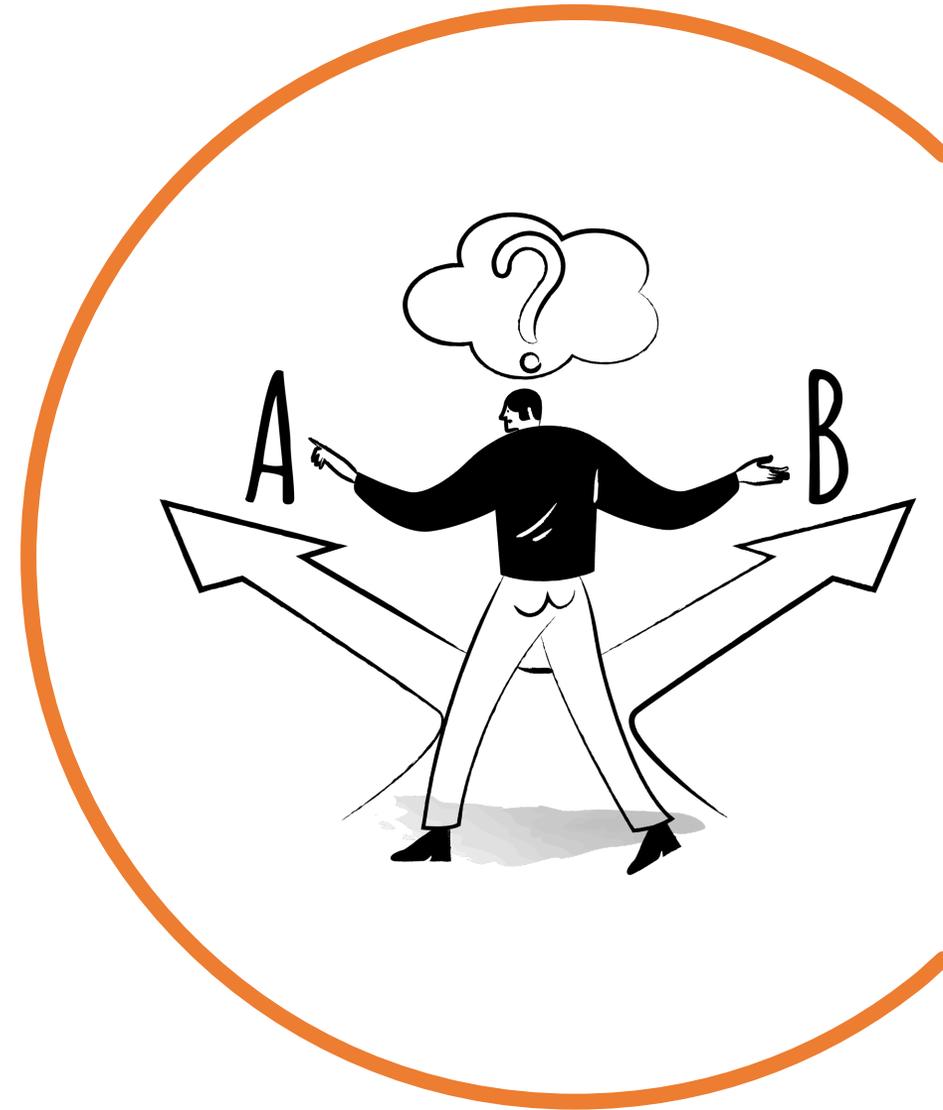
# HUMAN CENTERED DECISION MAKING



# Foundations 101

## Human Centered Decision Making

is rooted in how people process information and make decisions. By understanding the step-by-step human-centered decision-making process, we can be more deliberate and thoughtful in how we discover and develop customer insights.



# Human Centered Decision Making



## What It Is

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The foundation of human centered insight is rooted in how people process information and make decisions. By understanding the step-by-step human-centered decision-making process, we can be more deliberate and thoughtful in how we discover and develop customer insights.

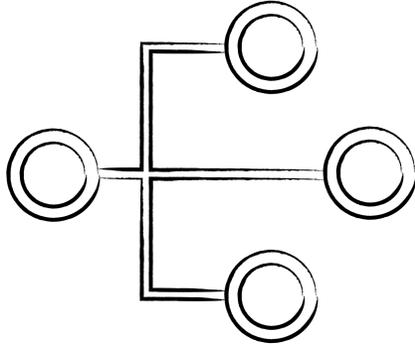
## When To Use It

---

Human Centered Decision Making is important to understand before starting the customer insight journey. It will help you better understand the role and distinctions of data, intuition and insights.



# The Two Types of Decisions



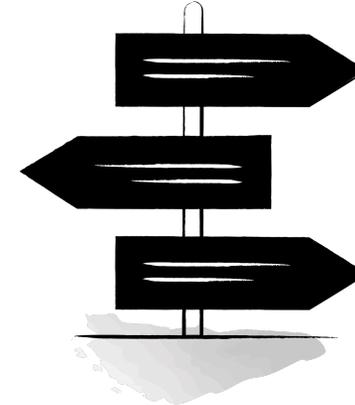
## Programmed

- Situations which are routine and well structured
- Can be concretely answered with policy or data
- Does not require a high degree of analysis and evaluation; the criteria that go into making the decision are known

### Example:

Q: How many units of product x needs to be sold in order to realize a volume discount?

Q: What is the optimal number of sales representatives to deploy in a new sales territory?



## Non-Programmed

- Situations which are unique, ambiguous and ill-structured.
- Policy and data analysis are often not enough to solve non-programmed problems/decisions
- Requires judgment, intuition, and customer insight.

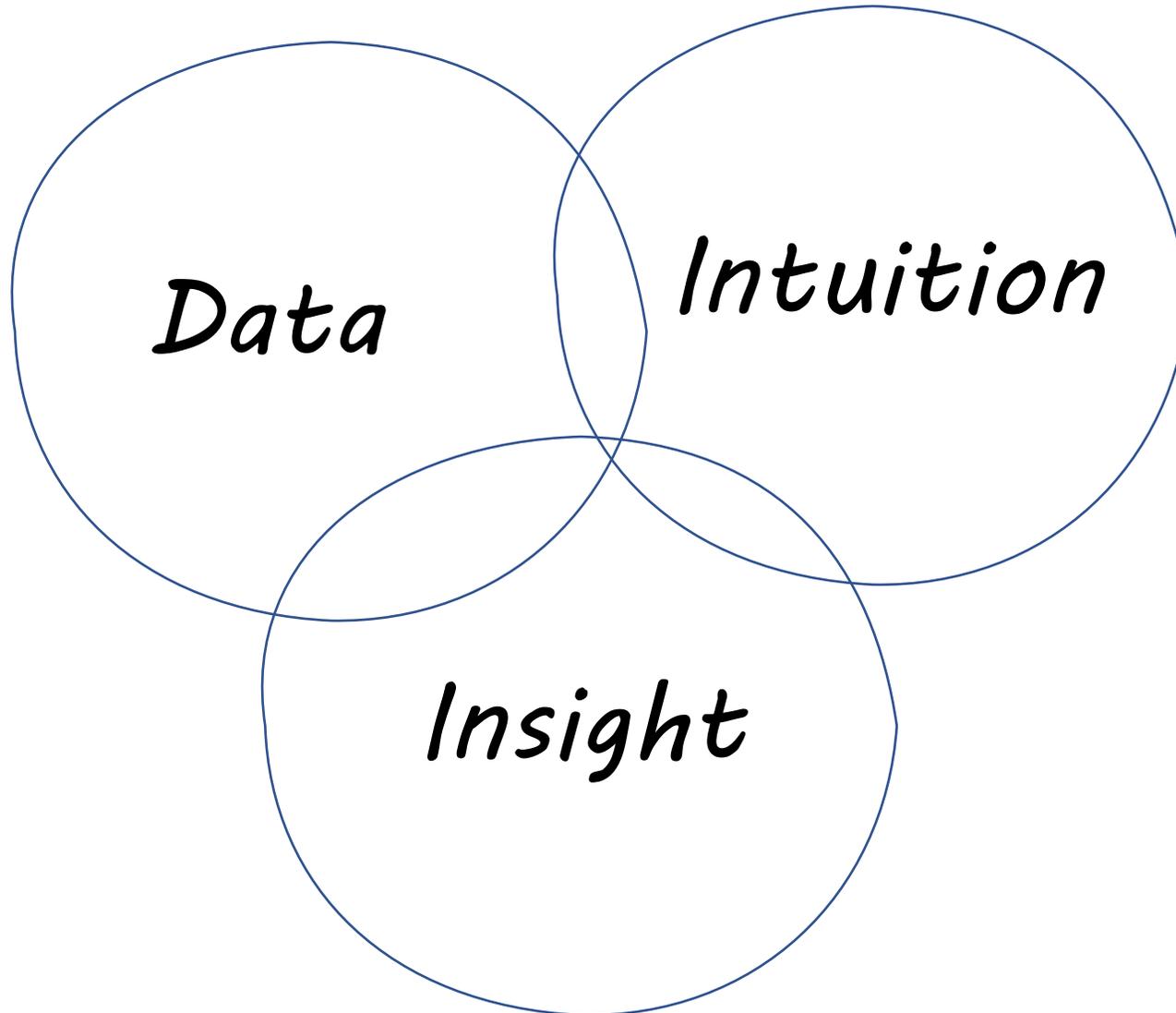
### Example:

Q: How should we position our brand with new customers to increase the likelihood that they repeat purchase our product?

Q: How might we motivate our customers to more regularly request our brand when they visit the pharmacy?



# The 3 Decision-Making Elements



# Data, Intuition and Insight

## DATA:

- 31% of children ages 10 to 17 do not consume fruits or vegetables on a daily basis.

- Fact-based
- Evidential
- Sourced

## INTUITION:

- Parents are more likely to buy snacks that are convenient and will cause less of a fuss from their children

- Based on a feeling or professional experience
- Not necessarily fact based

## INSIGHT:

- ‘The Path of Least-Parental-Resistance’
  - *“As a parent, it’s easier and cheaper for me to buy pre-packaged snacks than it is to constantly replenish fresh fruit and vegetables that the kids might not eat anyway.”*

- Based on the synthesis of data and user research
- More than just opinion but still requires judgment
- From the customer POV

# A Framework for Customer Insight

## The Insight Ladder

### WHO

Identify **who** are the people to learn about

### WHERE

Detail **where** we can learn about the people

### WHAT

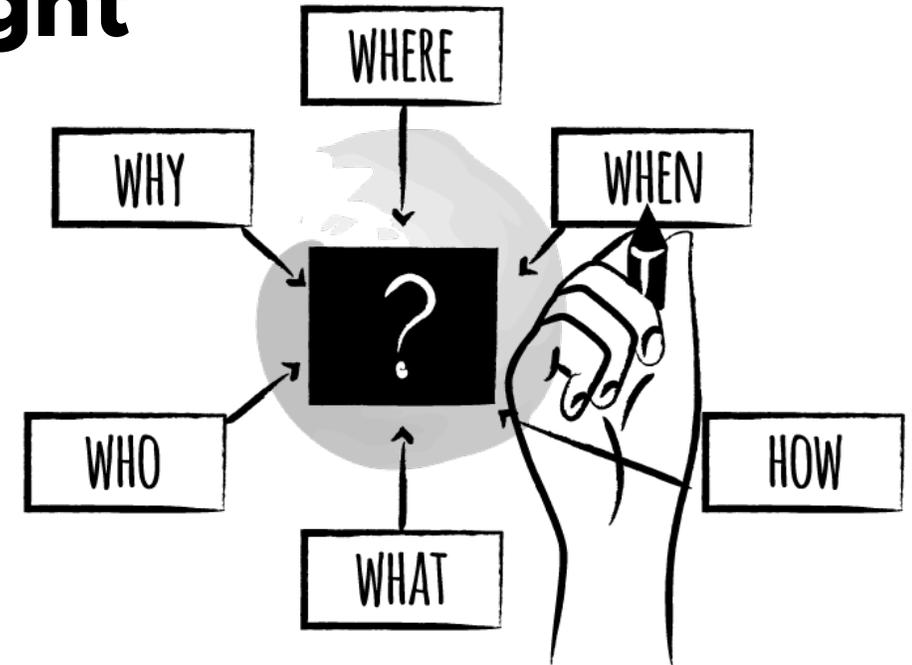
Collect & record **what** you have learned (facts, observations and insights)

### WHY

Synthesize the learnings into themes and **why** they matter

### HOW

Consider the user feedback and learnings and **How** to turn into opportunities



# A Framework for Insight

## The Insight Ladder

### WHO

Identify **who** you need to learn about

### HOW

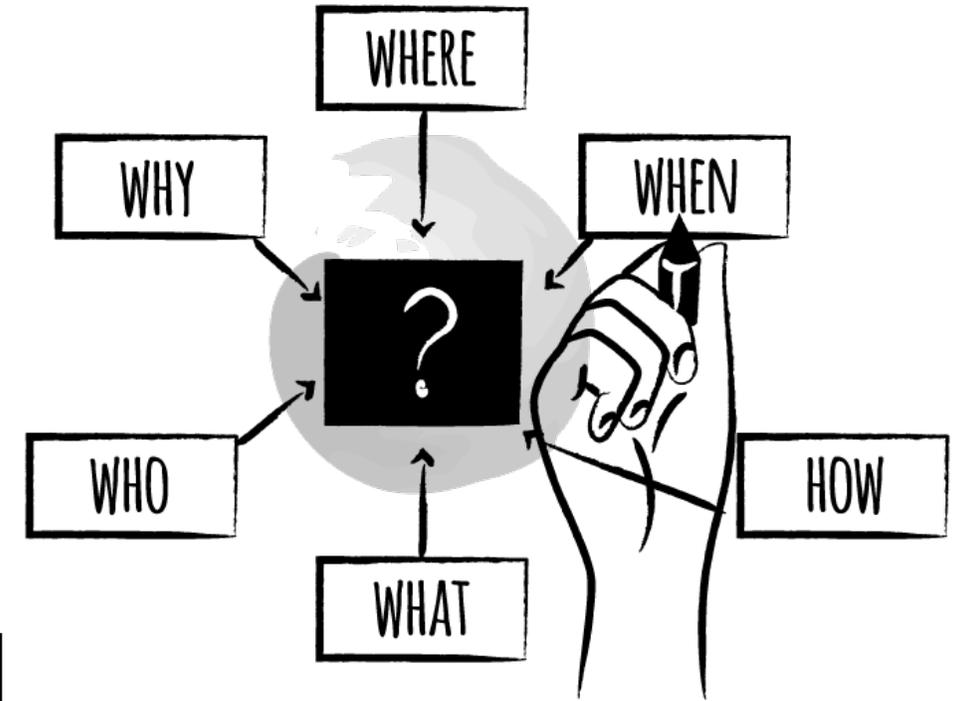
Determine **how** you can learn about them

### WHAT

Decide **what** to learn and how to record the findings

### WHY

Synthesize the findings into themes and decide **why** those insight themes matter to your customers and to your business



# A Framework for Insight

## The Insight Ladder

### WHO

Identify **who** you need to learn about

### HOW

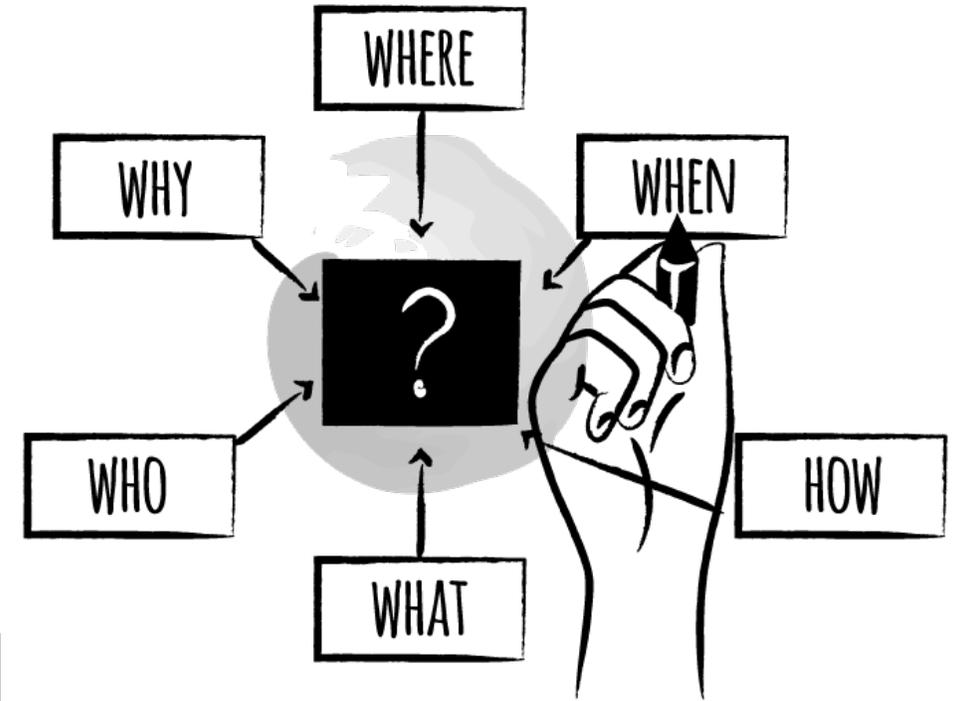
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# A Framework for Insight

## The Insight Ladder

### WHO

Identify **who** you need to learn about

### HOW

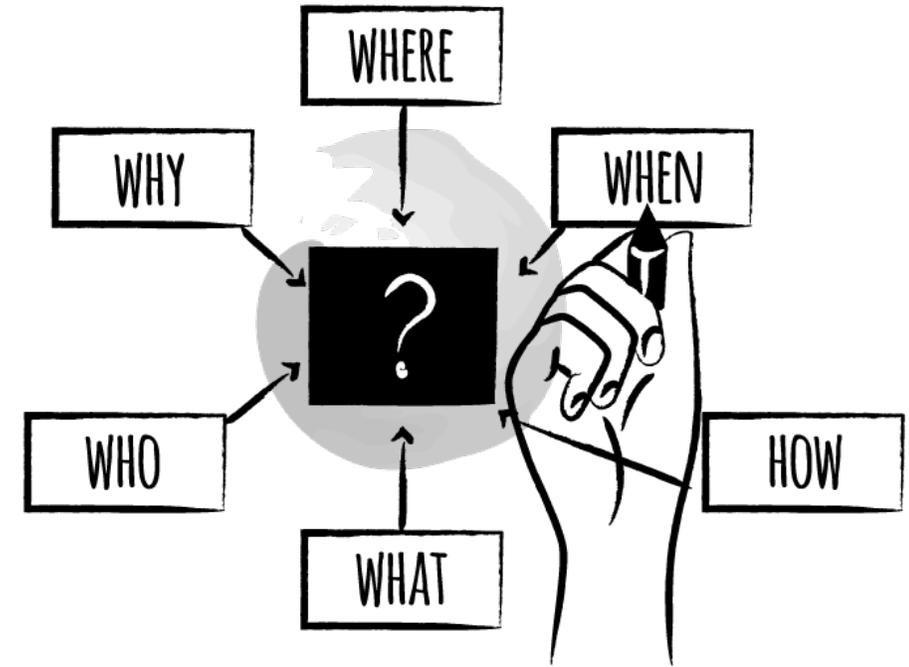
Determine **how** you can learn about them

### WHAT

Decide **what** to learn and how to record the findings

### WHY

Synthesize the findings into themes and decide **why** those insight themes matter to your customers and to your business



# A Framework for Insight

## The Insight Ladder

### WHO

Identify **who** you need to learn about

### HOW

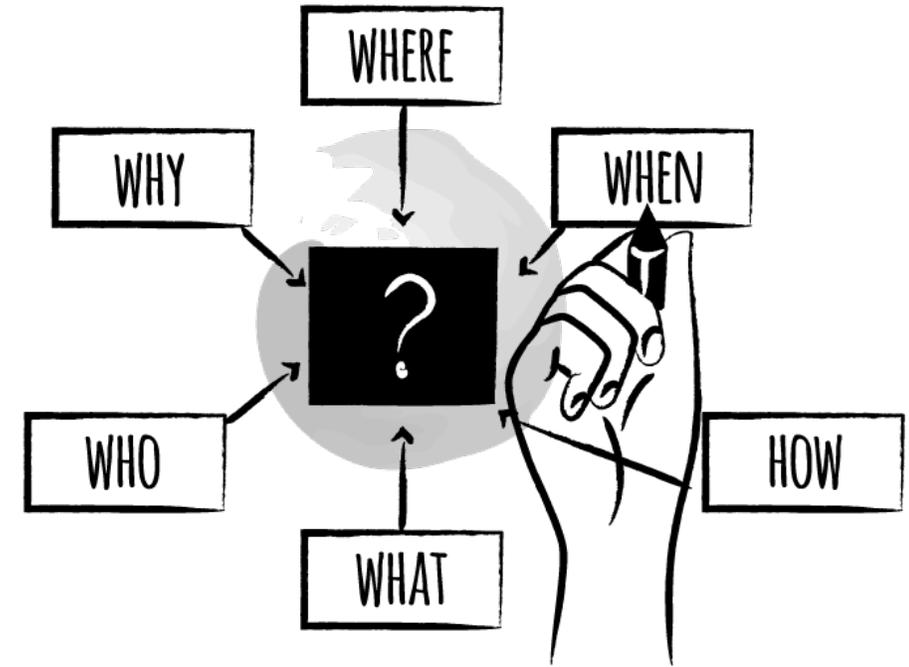
Determine **how** you can learn about them

### WHAT

Decide **what** to learn and how to record the findings

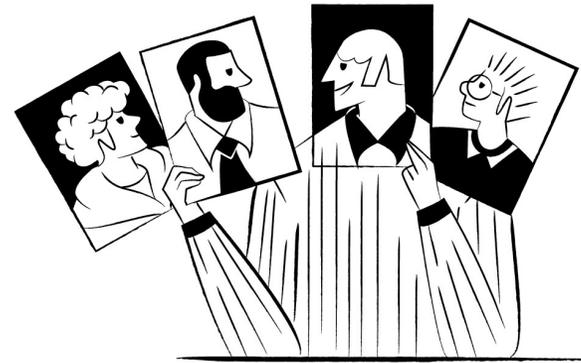
### WHY

Synthesize the findings into themes and decide **why** those insight themes matter to your customers and to your business



# Persona Planner

## Part 1 (The Who)



# Persona Planner

is a method for identifying WHO we need to learn about and HOW we can learn about them.

The result is a User Centered Learning plan that will guide us in uncovering customer insights.



# Persona Planner



## What It Is

---

**Persona Planner** is a method for identifying **WHO** we need to learn about and **HOW** we can learn about them.

The result is a User Centered Learning plan that will guide us in uncovering important data and discoveries.

## When To Use It

---

Persona planning can be used at the outset of understanding a problem, also known as problem finding. But it is equally important when we have an initial HMW question and need to better understand the problem statement by researching and/or discussing with potential users/stakeholders.



# Persona Planner – The WHO

## People

## Description

### The EVERYDAYS



Everyday people have an ordinary, day-to-day relationship to the challenge. Often tracking their actions and behaviors yields deep insight into the challenge area.

### The EXPERTS



Experts have a subject matter expertise or deep relationship related to the challenge area. They are fewer and are often on the leading edge and have strong beliefs.

### The EXTREMES



Extremes have an indirect, or adjacent relationship to the challenge. We identify them by asking “where else” do people face this challenge.

# Instructions

## Persona Planner *The WHO*

1

### DIVERGE

DIVERGE on the WHO by creating an expansive list of users/stakeholders

Repeat for all 3 categories

2

### EXPLAIN

For each group of target users you identified, give a reason WHY you feel they would be important to learn about.

3

### CONVERGE

Converge by selecting the Top 2 for each category that you feel is most important to learn about



# Persona Planner – Part 1 (The Who)

## *The Challenge Question*

### The Everyday



### The Expert



### The Extreme



### Group Converge

Drag your top 4 personas here

Drag your top 2 personas here

Drag your top 1 personas here

### Voting Stars

Take a star and drag it to the edge of a sticky note you want to vote for. 3 votes per person



# Persona Planner Top Tips

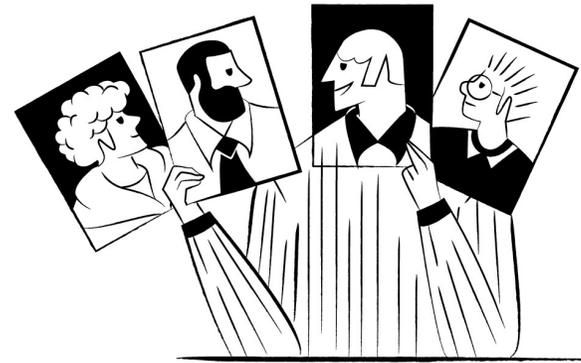


- **Start with the WHO**
- Your people plan should be **balanced amongst the groups**.
  - **Everyday** (60%)
  - **Experts** (30%)
  - **Extremes** (10%)
- **Solicit input** from people outside of the challenge
- **Be expansive** when you list out the WHO and HOW
- **Don't ignore the Extremes!**
- **Don't be afraid** to go outside of your office and talk to people!
- **Define clear responsibilities** for who is doing what to execute the plan



# Persona Planner

## Part 2 (The How)



# Persona Planner – The HOW

## Method

### RESEARCH



## Description

**SECONDARY RESEARCH** is information that may be in the team's possession or can be readily acquired through desk or data research.

### SURVEY



**SURVEYING** is a form of primary (or original) research and typically provides a limited amount of information from a large group of people.

### INTERVIEW



**INTERVIEWING** provides deep and intimate insight by exploring a topic with an individual or small group of subjects.

### OBSERVE



**OBSERVING** requires high involvement but can yield rich information because behavior reveals more than words. There are several ways to observe, including: Studying, Shadowing and Ethnography.

### EXPERIENCE



**EXPERIENCING** is the most direct and highest form of engagement when it comes to research. This is literally “walking a mile in another’s shoes.” This can be either: Experience Simulation or Direct Immersion.

# 3 Types of User Centered Interviews

## Bootstrap User Interviews



## In-Depth Interviews



## Focus Group Interviews



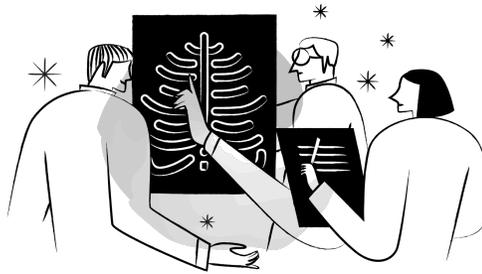
# 3 Types of Observation

## Naturalistic Observation



Naturalistic observation is observing behavior in the environment in which it typically occurs.

## Shadowing



Shadowing is the following and observes of a subject during their normal activities.

## Ethnographic Research



Ethnography involves direct observation as well as participant interviews over a period of time.

# 3 Types of Experience

## Simulation



*Simulations model the live experience in an experimental environment.*

## Immersive Experience



*Immersion is the researcher being inserted directly as a participant in a live experience.*

## Disguised Participation Observation



*Disguised participant observation has the researcher pretending to be a member of the social group they are observing.*

A young boy with black-rimmed glasses is smiling and holding a large head of green broccoli. He is wearing a grey sweater. The background is a solid light blue color. A large black circle is overlaid on the center of the image, containing white text.

How might  
we motivate  
my son to eat  
vegetables?

# How Might We Motivate My Son to Eat Veggies?

## WHO

Parent of a Picky Eater



Feeding Specialist



Dog Trainer



## HOW

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- **Secondary Research:** Mommy blog
  - **Survey:** Field a survey with parents of the local school's PTA.
  - **Observe:** Have dinner with family of a picky eater
- 
- **Secondary Research:** Articles, videos & postings by well known behavioralists
  - **Interview:** Conduct one on one interview with them on dealing with veggie aversion
  - **Observe:** Spend a day at a feeding clinic with a specialist
- 
- **Secondary Research :** Stories / articles from dog trainers who deal with aversions to specific foods or other items
  - **Interview:** User intercept at a local dog training center
  - **Experience:** Volunteer to work with a dog trainer for a couple of days

# Instructions

## Persona Planner *THE HOW*

1

### The WHO

Select one subject (The WHO) for each of the three categories

2

### The HOW

DIVERGE on the HOW you will learn about each of the subjects

Repeat for all 5 research methods

3

### The Plan

Converge on 2-3 research options for each of your users.



# Persona Planner – Part 2 (The HOW)

The Everyday

WHO

HOW



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The Expert

WHO

HOW



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The Extreme

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Group Converge

Drag Over the Top 2 HOWs

# Top Tips

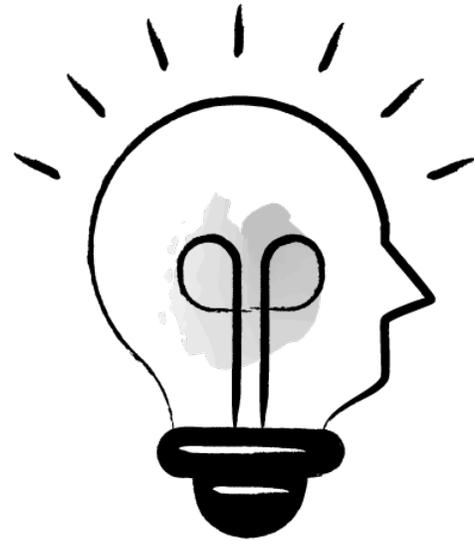


- **Don't Be in a Hurry:** Putting together a research plan takes practice, and it starts with the ability to slow down, stop, and think.
- **Start at the Desk...But Don't End There:** There is a wealth of information just a few internet searches away. Don't ignore what's already been discovered. That said, don't rely entirely on other people's research and opinions. Formulate your own to complement others.
- **Go Outside of Your Personal Experience:** We bring our own experience and bias when researching. Try to consciously focus on other people so you can plan to learn about them.
- **Diversity of Perspective:** Building your plan on HOW you will research will be greatly augmented when you invite other colleagues/team members to brainstorm with you for each category.
- **Meta-Research:** Search out examples of how other people have researched about your subjects. Sometimes the most creative research method doesn't need to be your own.
- **Create Some Collisions!:** The best way to learn is to create situations in which you “collide” with other humans. Don't be afraid to go outside of your office and talk/observe people!



# MODULE #3

## *Ideation*





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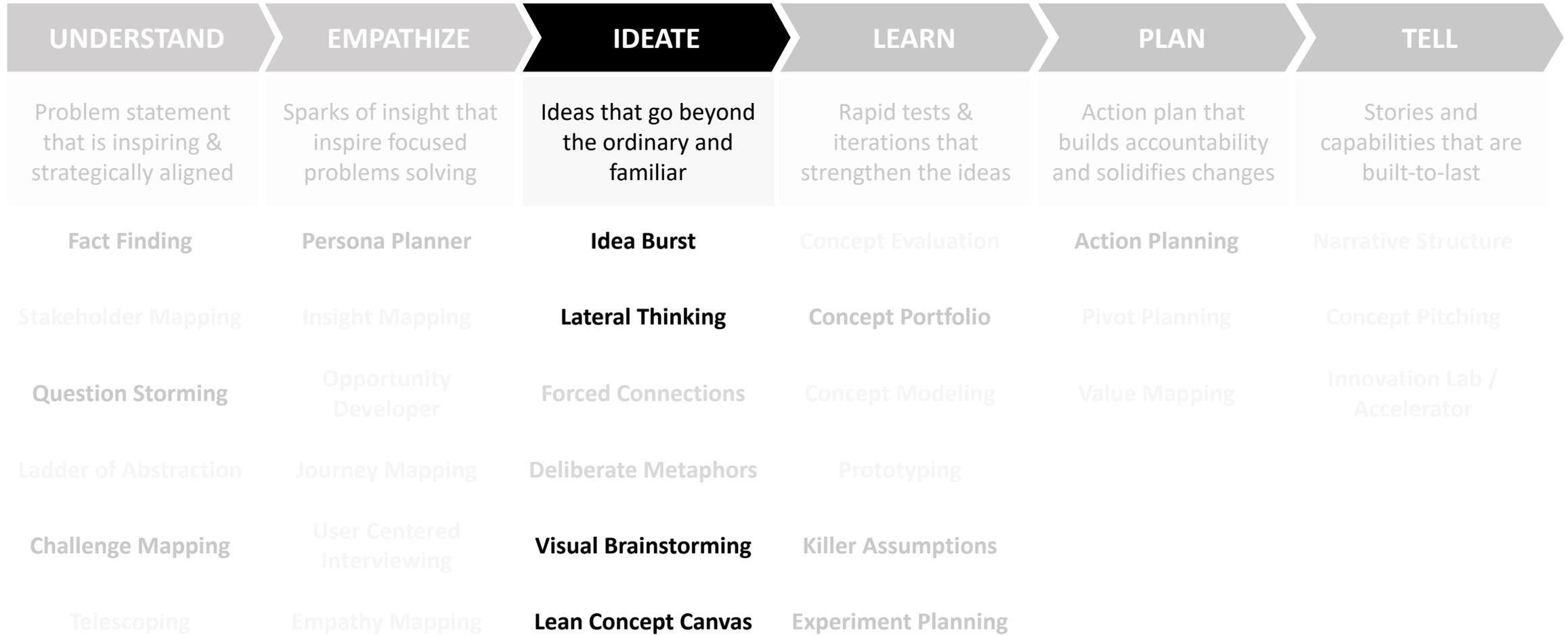
## Ideating

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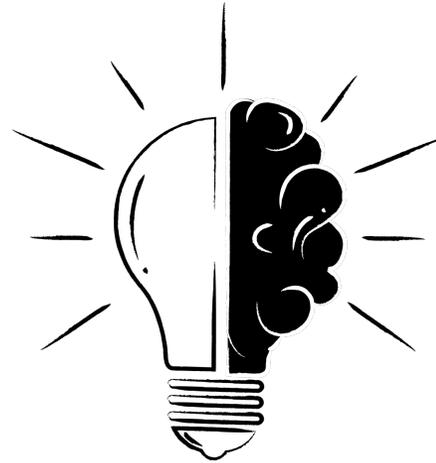
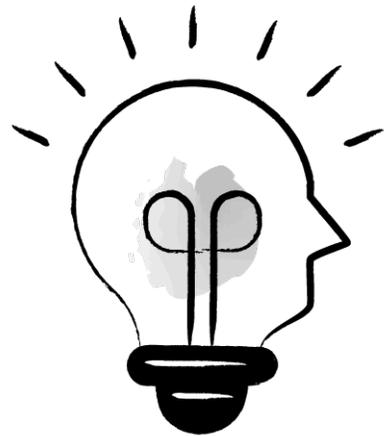
is about using systematic methods  
AND great facilitation techniques to  
produce novel and creative solutions  
to our challenge

# The Deliberate Innovation Framework

This module will focus here on the framework.

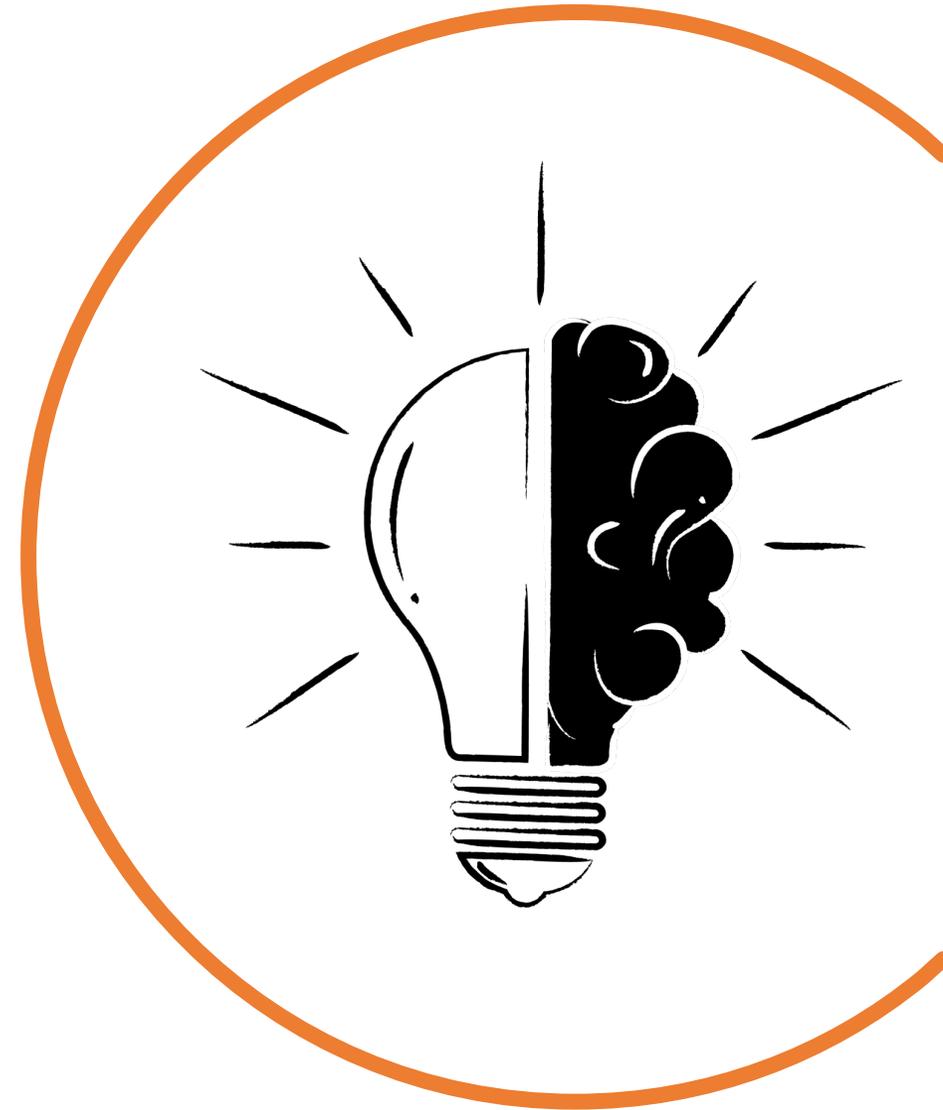


# IDEA BURST

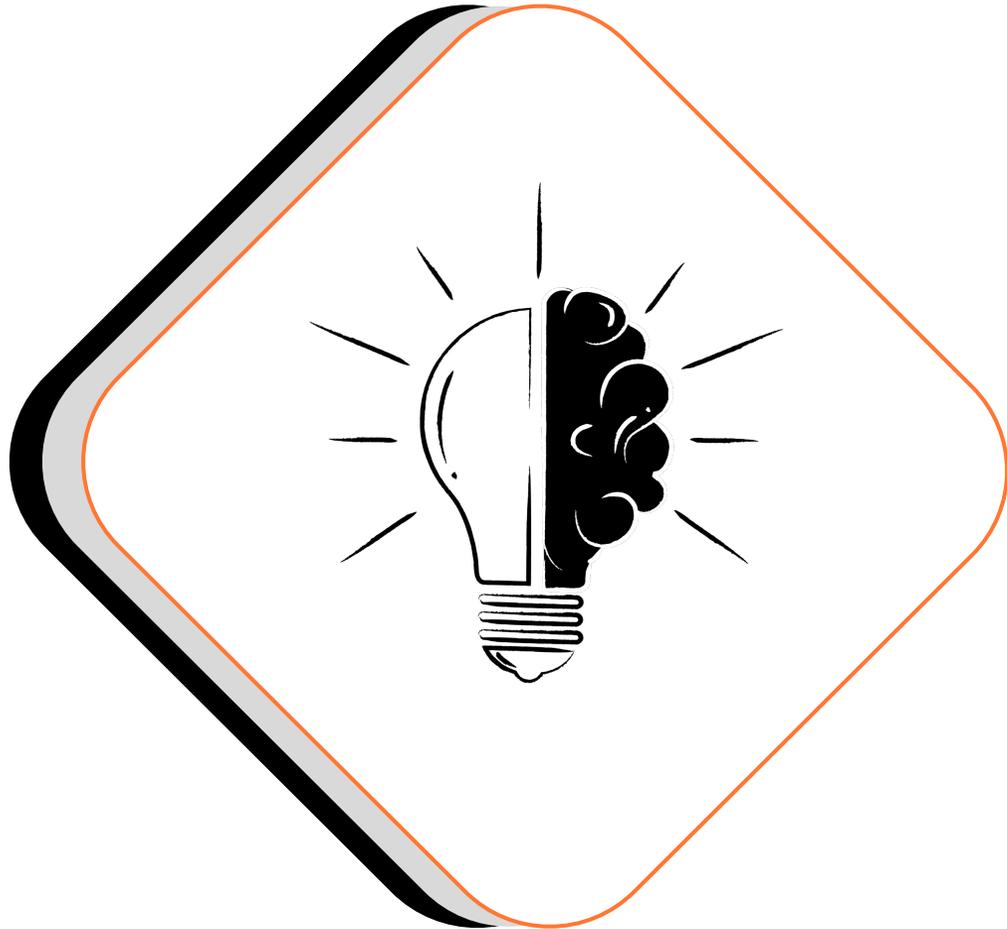


## **Idea Burst**

Takes brainstorming to another level by providing a deliberate and systematic way of producing starter ideas.



# Idea Burst



## What It Is \_\_\_\_\_

This technique takes brainstorming to another level by providing a deliberate and systematic way of facilitating the production of starter ideas

## When To Use It \_\_\_\_\_

Idea Burst is best used when a group has NOT yet tried to solve the question before. Idea Burst works well when the group has a fresh perspective on the challenge. It also works well as a “warm up” to problem solving or to uncover hidden away ideas.

When used during problem solving, the Idea Burst can bring team members' diverse experience into play. It can increase the richness of ideas and increase team norming.



# How it Works

- 1** **Introduce** the focus area / challenge question (HMW Question)
- 2** **Ideate** Independently – Diverge AND Converge
- 3** **Refine, Group and share** the starter ideas in a common space
- 4** **Discuss** and improve upon the ideas
- 5** **Select** the most compelling ideas for further development



# Idea Burst Canvas - DIVERGING

## The Fondue

Insert vegetables and fruits into a low fat/sugar chocolatee like using fondue

## Disguise

Chopped it up into other foods he likes do disguise the vegetables. Then reveal that he's eating his veggies!

## Technology Points

For every vegetable he eats, he will earn points that can be used for screen time

## Vegetable Idol

Invite someone he looks up to or idolizes to dinner and make sure they eat LOTS of vegetables. Role modeling!

## Hypo-Eating

Have a hypnotist come over and convince him he LOVES eating vegetables

## Before / After

Highlight the before / after of what people look like who eat their vegetables

## Immediate Reward

Celebrate loudly and profusely when he eats a vegetable. A standing family ovation.

## Make it a Game

Turn eating vegetables into a game. Points can be won; veggies can be traded. Even create trading cards for each one that's found and eaten.

## The Fondue

Insert vegetables and fruits into a low fat/sugar chocolate like using fondue

1

One idea per post-it note

2

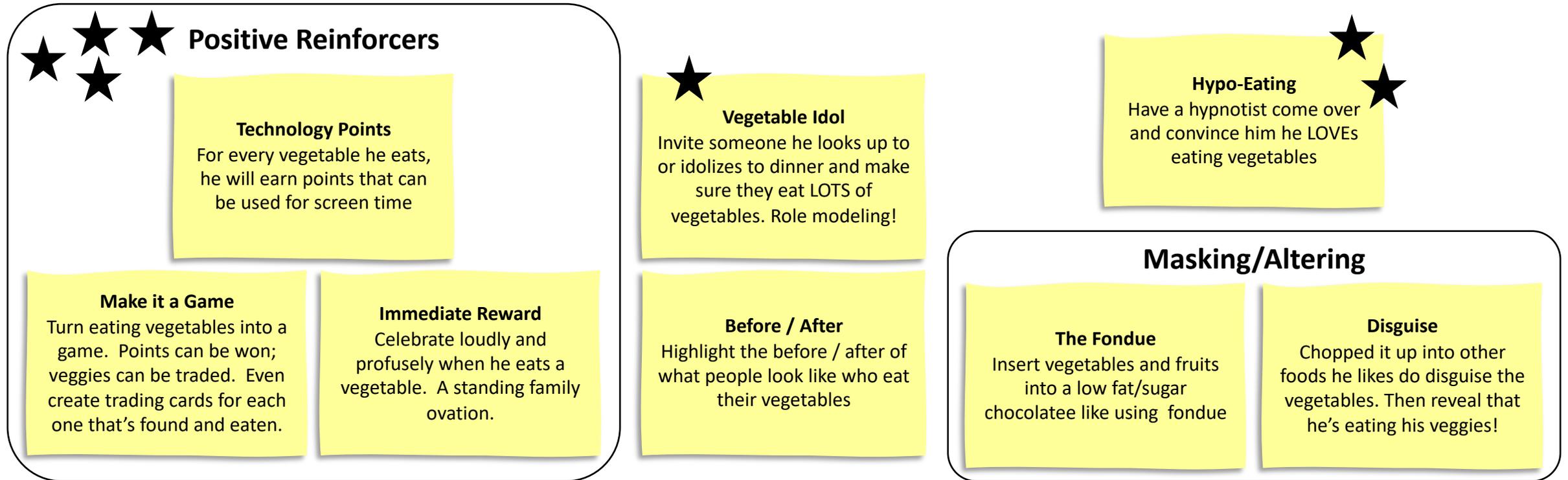
Each idea should be a complete thought

3

Give a memorable title



# Idea Burst Canvas - CONVERGING



- 1 Allow time for explanation to ensure understanding amongst the group
- 2 Group similar ideas (give the groups names)
- 3 Cast 3 votes for your favorite ideas



# Exercise Overview



# Participant Top Tips



- Don't **self edit**
- **One idea** per post-it note
- Write a **complete thought** but not multiple paragraphs
- **Maintain Momentum** – More Time Can Be Less!
- **Over-Synthesis** – Be careful to not over group your ideas – Let Good Ideas stand Alone



# How to Facilitate It

## Idea Burst

1

### DIVERGE

Each team member INDIVIDUALLY takes 3 minutes to record starter ideas to the challenge

\* Make sure to give your idea a catchy name and concise description

2

### CONVERGE

Each team member takes 2 minutes to review their starter ideas and \*select their top 3 ideas.

\* Drag over the 2 post-it notes to the convergence board

3

### SHARE & VOTE

Exercise facilitator leads discussion and groups related ideas

Vote on the top ideas using the voting stars.

\* Each participant has 3 votes





# Facilitator Top Tips

- **Find the Flow** – Successful teams have great “flow”. Create an energy and a pace within your team that enables everyone to work together well.
- **Listen and Re-express** – Give attention to the speaker, be inquisitive and encourage them to fully express their ideas. Be sure to summarize / restate what you hear and ask for confirmation
- **Maintain Momentum** – Keep a rapid tempo to allow you to go slow when you need to think deeply and move fast when you need land your ideas. Don’t get trapped in circular debate/discussions
- **Beware of the Idea Killers** – Encourage “yes...and”. Park criticism on post-its for later.
- **Energy and Enthusiasm is 90% of It!** – Keep an enthusiastic outlook and encourage everyone to participate, take turns and have fun.



# Idea Burst Template (Part 1)

## Individual Divergence

Record your start ideas using the sticky notes below

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## Individual Convergence

Move your favourite 3 ideas over here

|                            |
|----------------------------|
| Drag your top 3 ideas here |

### Voting Stars

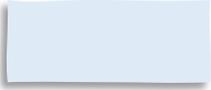
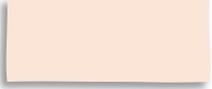
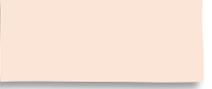
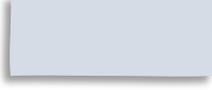
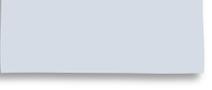
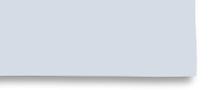
Take a star and drag it to the edge of a sticky note you want to vote for.  
3 votes per person



# Idea Burst Template (Part 2)

## Individual Convergence

Move your favourite 3 ideas over here

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### Voting Stars

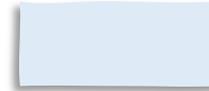
Take a star and drag it to the edge of a sticky note you want to vote for.  
3 votes per person



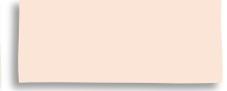
## Group Discussion / Theming

Plot the starter idea on the board, group/theme similar ideas and add "Yes...And" builds

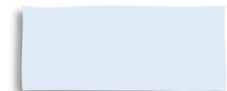
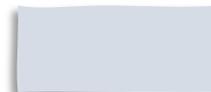
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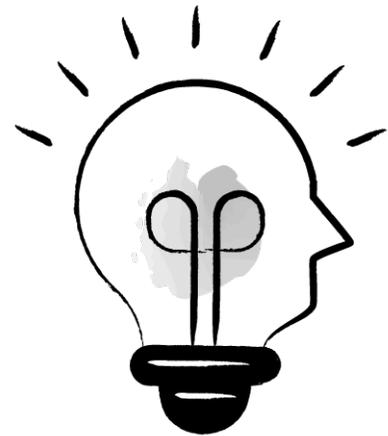
### Theme Description



### Theme Description



# VISUAL BRAINSTORMING



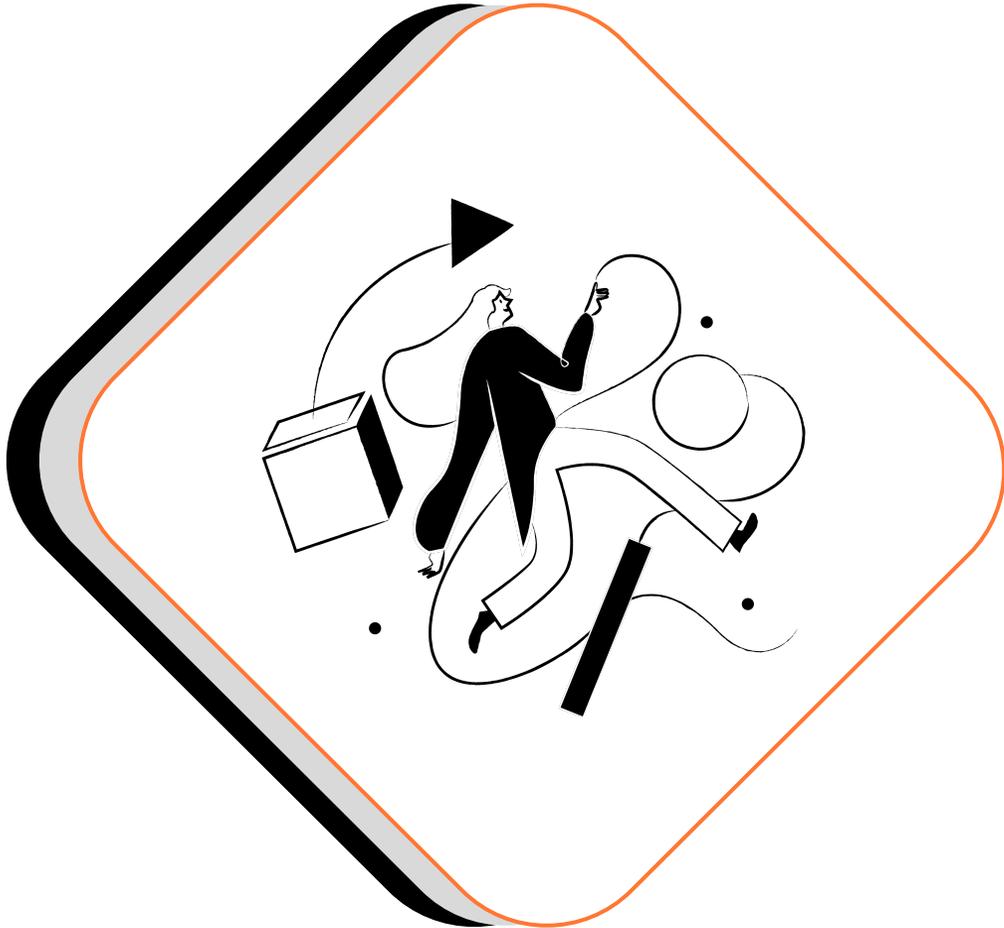
# Visual Brainstorming

is an alternate method of collaboratively generating ideas without using the spoken or written word. The human brain can process images up to 60,000 times faster than words.

Visuals can convey so much more information than you can with words and can convey abstract and complex concepts such as facial expressions.



# Visual Brainstorming



## What It Is

---

This is an alternate method of collaboratively generating ideas without using the spoken or written word. The human brain can process images up to 60,000 times faster than words. Visuals can convey so much more information than you can with words and can convey abstract and complex concepts such as facial expressions.

## When To Use It

---

Visual brainstorming is best used in the following circumstances:

- Participants are struggling to put their ideas into words.
- You've already tried a traditional idea burst and the ideas were uninspiring.
- You need to break the monotony of a meeting or workshop



# How it Works

- 1** Reflect on the problem / opportunity and allow your mind to wander
- 2** Start drawing while you are mentally modeling the idea
- 3** Express your drawing in words and give it a header
- 4** Share the ideas as a group and summarize the meaning of each illustration
- 5** Vote on top ideas



# How to Facilitate It

## Visual Brainstorming

1

### DRAW

Each team member INDIVIDUALLY  
takes 10 minutes to draw 3 - 4  
ideas

2

### CONVERGE

Each team member takes a  
moment to reflect on and review  
their drawings and give each  
picture a headline

3

### SHARE & VOTE

Exercise facilitator invites  
participants to share their favorite  
idea.

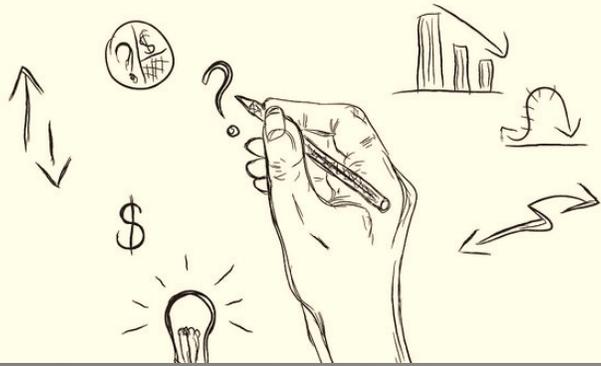
Facilitator adds a post-it note with  
an explanation

Vote on the top ideas  
*(3 votes per participant)*

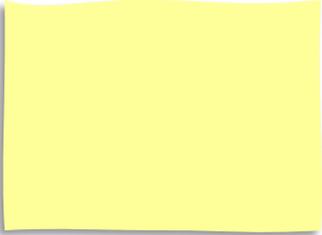
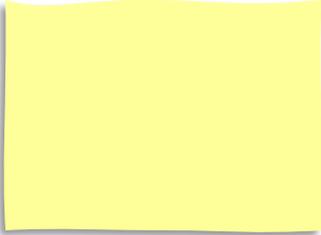
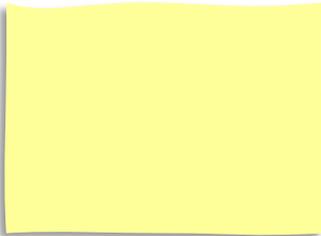
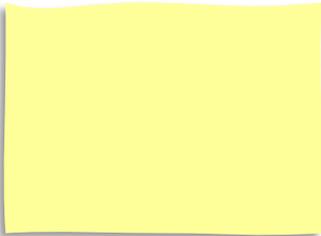


### The Remote Meet-Up Network

A service that works like tinder that randomly matches "professionals like you" in your area to form networks.



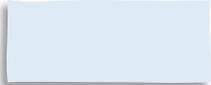
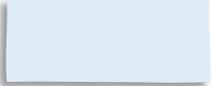
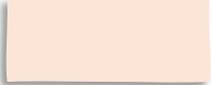
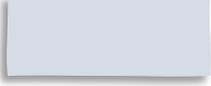
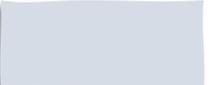
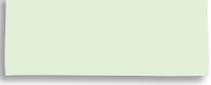
# Visual Brainstorming Template (Part 1)

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| <p><b>Idea #1</b></p>   | <p><b>Idea #2</b></p>   |
| <p><b>Idea #3</b></p>  | <p><b>Idea #4</b></p>  |

# Visual Brainstorming Template (Part 2)

## Individual Convergence

Move your favourite 2 ideas over here

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### Voting Stars

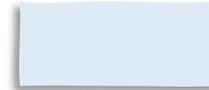
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3 votes per person



## Group Discussion / Theming

Plot the starter idea on the board, group/theme similar ideas and add "Yes...And" builds

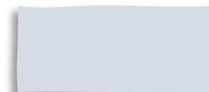
### Theme Description



### Theme Description



### Theme Description



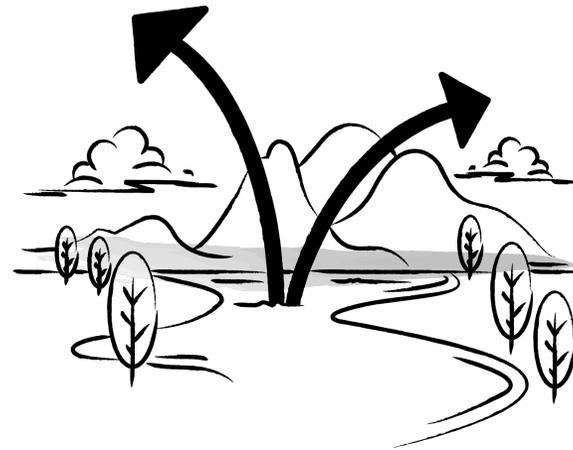
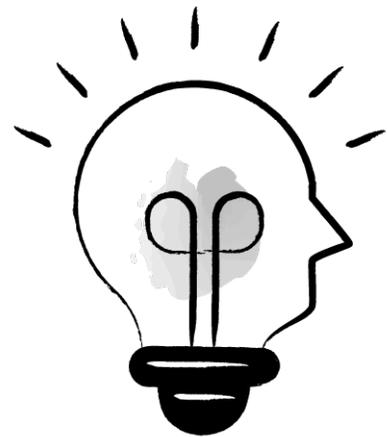


# Visual Brainstorming Top Tips

- **Don't Self-Edit**
- **Don't Have a Meeting with Yourself** – Allow your hands to work in parallel with your mind
- **“Don't Aim for Perfection”** – Nobody in the room is Picasso
- **Keep It Simple** - Stick figures are cool!
- **Push Your Thinking** – Strive for radical and far-reaching ideas – Think about the basic truths and challenge it by asking.... “What If?”
- Focus on the **Storytelling**

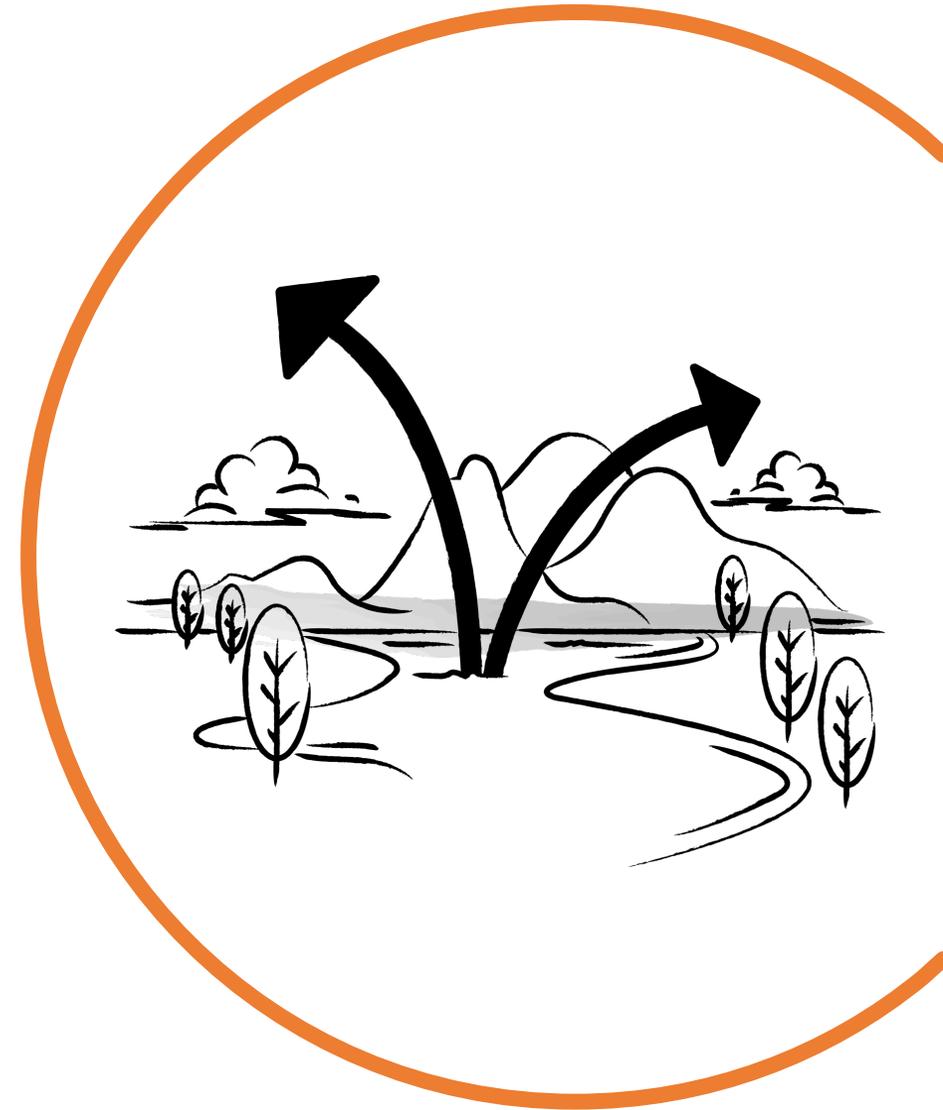


# LATERAL THINKING

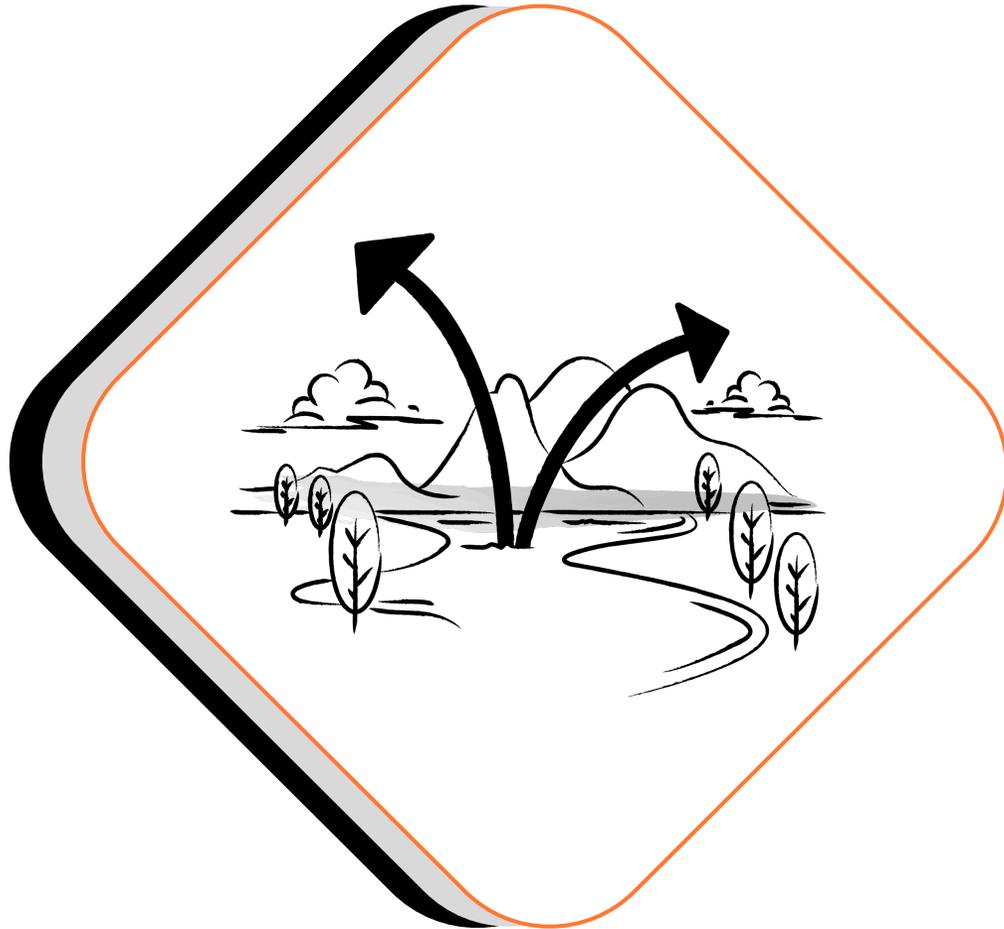


# Lateral Thinking

is a way of approaching problems. It deliberately forgoes obvious approaches in favor of oblique or unexpected ones. This technique enables you to view the problem in a new and unusual light.



# Lateral Thinking



## What It Is \_\_\_\_\_

Lateral thinking is a way of approaching problems. It deliberately forgoes obvious approaches in favor of oblique or unexpected ones. This technique enables you to view the problem in a new and unusual light.

## When To Use It \_\_\_\_\_

Lateral Thinking is useful when you have exhausted most of the familiar and logical solutions to your problem. When a team needs an unexpected and/or disruptive idea, Lateral Thinking is most useful.



# How it Works

- 1** Review the HMW challenge question
- 2** List the basic truths
- 3** Ask provocative “What if...” questions
- 4** Select a provocative question
- 5** Answer the provocative question with an idea that makes it possible



# Lateral Thinking Definitions

## Lateral Thinking

Lateral thinking is solving problems through an indirect and creative approach, using reasoning that is not immediately obvious and involving ideas that may not be obtainable by using only traditional step-by-step logic.

## Basic Truth

A basic truth is a universally held convention or belief. It is so basic that we generally accept it as an immutable fact that cannot be changed. The best basic truths are the rules that haven't been tested or questioned for years. These are the rules of the market, or business, that are long overdue and begging to be broken.

e.g. Basic Truth: Doctors treat patients

## Provocative Question

The purpose of a provocation question is to forcibly cause your mind to move out of well-worn mental tracks, allowing you to come up with potentially radical solutions to a familiar problem. Provocative questions are "what if" questions that challenge a basic truth. And if the questions sound absurd, or impossible, it means you are doing it right. They are meant to push you out of your patterns of thinking and to look at the problem in an entirely different way

### Three fundamental types of provocative questions are:

1. *Removal* – To negate or take the opposite of the basic truth  
e.g. Provocative Question: What if there were no doctors?  
e.g. Provocative Question: What if there were no patients?
2. *Exaggeration* – To enlarge beyond the bounds of possibility or truth. Distorting the natural size or nature of something.  
e.g. Provocative Question: What if patients were only treated when they sleep?  
e.g. Provocative Question: What if patients were paid to be treated by doctors?
3. *Reversal* – To rearrange the order of the words / assumptions to create an unusual contrast.  
e.g. Provocative Question: What if patients treated the doctors?  
e.g. Provocative Question: What if patients visited the doctors at their homes?



# Example: Lateral Thinking

**Challenge:** We do not have enough time during the day to get our work done

## 1 Basic Truth

- Work is done after hours
- We work during daytime hours
- We spend our work hours in meetings
- We do the work ourselves
- Work has to get done

## 2 Provocative Question

- What if we didn't work during the day?
- What if the work did it by itself?
- What if the day worked us?
- What if we only were allowed to work when we were at our mental peak?
- What if worked only at nighttime?

## 3 Starter Ideas

### The 5 Hour Workday

Block out a 5-hour period every day that is dedicated to heavy cognitive thinking. Leave the rest for meetings & admin.

### Circadian Rhythm

Measure your circadian rhythm and determine the best time for you to start and finish work. Adjust your work schedule to match your natural tendency.

### AI Buddy

Integrate an AI Bot to accelerate low value add work when we are at our lower mental peak to preserve our mental capacity



# How to Facilitate It – Part 1



# How to Facilitate It – Part 2

## Lateral Thinking using Provocative Questions

1

### GROUP WARM-UP

As one group, we will facilitate the generating of “provocative questions” with one of the prioritized facts

2

### BREAKOUT

As a team, you will be assigned 2 additional “truths”  
Select a facilitator  
Select one truth to work on at a time.

3

### REVIEW

Records as many “What if” questions as possible in 3 mins  
Repeat the process for the other Basic Truth

4

### DISCUSS & VOTE

Facilitate reviews questions.  
As a group pick your Top 2 favorite questions to ideate on.



# How to Facilitate It – Part 3

## Idea Burst

1

### DIVERGE

Each team member INDIVIDUALLY takes 3 minutes to record starter ideas to the provocative question(s)

\* Make sure to give your idea a catchy name and concise description

2

### CONVERGE

Each team member takes 2 minutes to review their starter ideas and \*select their top 3 ideas.

\* Drag over the 2 post-it notes to the convergence board

3

### SHARE & VOTE

Exercise facilitator leads discussion and groups related ideas

Vote on the top ideas using the voting stars.

\* Each participant has 3 votes





# Top Tips – Basic Truths

- **Conventional Wisdom** - If it sounds like a cliché that you often hear... perfect!
- **Keep it Simple** – The more basic, the better. The more nuanced, the harder it gets.
- **Volume** - Go for volume of *truths* or conventions. Quantity over Quality.
- **Relevant to the Challenge** - Make sure that you select *basic truths* for which disruption would address the challenge at hand

*(just because it's true, doesn't mean it's helpful to address)*





# Top Tips – Provocative Questions

- **Re-Expression** - Be careful not to over-generalize to the point of diluting the problem or be so specific that you overly limit your possibilities
- **Diverge** - Make sure to be generous with the number of worlds you generate. Look to science, nature, other industries, etc.
- **Metaphors** - Leverage the power of analogies and metaphors to find meaningful related worlds
- **Focus on the Principles** - Make sure to extract the WHY of the related world before applying



# Basic Truths Template (Part 1)

## Basic Truths Brainstorm

|  |  |  |  |  |  |  |  |
|--|--|--|--|--|--|--|--|
|  |  |  |  |  |  |  |  |
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|  |  |  |  |  |  |  |  |
|  |  |  |  |  |  |  |  |

Place your top two  
Truths here



# Provocative Questions Template (Part 2)

|                              |                |  |         |         |         |         |         |         |         |         |         |         |         |         |         |         |         |         |         |         |         |         |         |         |         |         |                               |   |
|------------------------------|----------------|--|---------|---------|---------|---------|---------|---------|---------|---------|---------|---------|---------|---------|---------|---------|---------|---------|---------|---------|---------|---------|---------|---------|---------|---------|-------------------------------|---|
| <b>Part 2a</b><br>Diverging  | Basic Truth #1 | <table border="1"><tr><td>What if</td><td>What if</td><td>What if</td><td>What if</td><td>What if</td><td>What if</td></tr><tr><td>What if</td><td>What if</td><td>What if</td><td>What if</td><td>What if</td><td>What if</td></tr><tr><td>What if</td><td>What if</td><td>What if</td><td>What if</td><td>What if</td><td>What if</td></tr><tr><td>What if</td><td>What if</td><td>What if</td><td>What if</td><td>What if</td><td>What if</td></tr></table> | What if | <b>Part 2b:</b><br>Converging | <p>Use the voting stars to vote on your favorite provocative questions:</p> <ol style="list-style-type: none"><li>1. Drag star over to a sticky note to cast your vote.</li><li>2. Each person votes 3 times.</li><li>3. The provocation with the most votes will be used for ideation.</li></ol> <p><b>Voting Stars</b></p> <p>★ ★ ★ ★ ★<br/>★ ★ ★ ★ ★<br/>★ ★ ★ ★ ★</p> <p><b>Top Provocation #1</b></p> <div data-bbox="2084 572 2339 739" style="border: 1px solid black; height: 100px; width: 100%;"></div>   |
| What if                      | What if        | What if  | What if | What if | What if |         |         |         |         |         |         |         |         |         |         |         |         |         |         |         |         |         |         |         |         |         |                               |   |
| What if                      | What if        | What if  | What if | What if | What if |         |         |         |         |         |         |         |         |         |         |         |         |         |         |         |         |         |         |         |         |         |                               |   |
| What if                      | What if        | What if  | What if | What if | What if |         |         |         |         |         |         |         |         |         |         |         |         |         |         |         |         |         |         |         |         |         |                               |   |
| What if                      | What if        | What if  | What if | What if | What if |         |         |         |         |         |         |         |         |         |         |         |         |         |         |         |         |         |         |         |         |         |                               |   |
| <b>Part 2a:</b><br>Diverging | Basic Truth #2 | <table border="1"><tr><td>What if</td><td>What if</td><td>What if</td><td>What if</td><td>What if</td><td>What if</td></tr><tr><td>What if</td><td>What if</td><td>What if</td><td>What if</td><td>What if</td><td>What if</td></tr><tr><td>What if</td><td>What if</td><td>What if</td><td>What if</td><td>What if</td><td>What if</td></tr><tr><td>What if</td><td>What if</td><td>What if</td><td>What if</td><td>What if</td><td>What if</td></tr></table> | What if | <b>Part 2b:</b><br>Converging | <p>Use the voting stars to vote on your favorite provocative questions:</p> <ol style="list-style-type: none"><li>1. Drag star over to a sticky note to cast your vote.</li><li>2. Each person votes 3 times.</li><li>3. The provocation with the most votes will be used for ideation.</li></ol> <p><b>Voting Stars</b></p> <p>★ ★ ★ ★ ★<br/>★ ★ ★ ★ ★<br/>★ ★ ★ ★ ★</p> <p><b>Top Provocation #2</b></p> <div data-bbox="2084 1132 2339 1299" style="border: 1px solid black; height: 100px; width: 100%;"></div> |
| What if                      | What if        | What if  | What if | What if | What if |         |         |         |         |         |         |         |         |         |         |         |         |         |         |         |         |         |         |         |         |         |                               |   |
| What if                      | What if        | What if  | What if | What if | What if |         |         |         |         |         |         |         |         |         |         |         |         |         |         |         |         |         |         |         |         |         |                               |   |
| What if                      | What if        | What if  | What if | What if | What if |         |         |         |         |         |         |         |         |         |         |         |         |         |         |         |         |         |         |         |         |         |                               |   |
| What if                      | What if        | What if  | What if | What if | What if |         |         |         |         |         |         |         |         |         |         |         |         |         |         |         |         |         |         |         |         |         |                               |   |

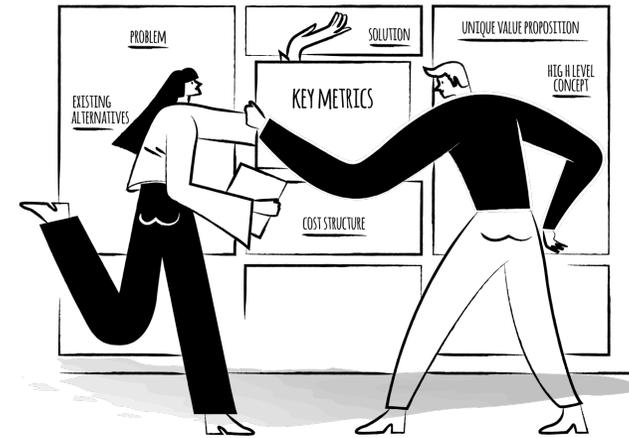
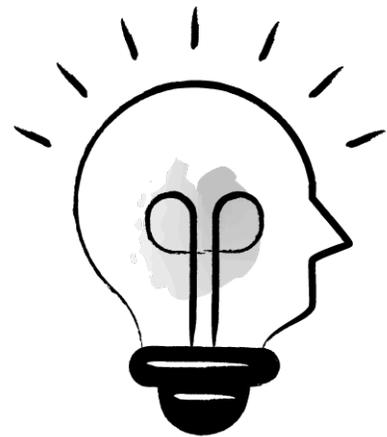


# Starter Ideas Template (Part 3)

|   |  |              |  |              |
|---|--|--------------|--|--------------|
| <b>Part 2a:<br/>Diverging</b>   | Provocation #1   | Starter Idea | Starter Idea   | Starter Idea |
| Remove<br>Eliminate<br>Exaggerate<br>Reversal   | <div style="border: 1px solid gray; height: 256px;"></div> | Starter Idea | Starter Idea   | Starter Idea |
|   |  | Starter Idea | Starter Idea   | Starter Idea |
|   |  | Starter Idea | Starter Idea   | Starter Idea |
| <b>Part 1b:<br/>Converging</b>  |  |              |  |              |
| Use the voting stars to vote on your favorite provocative questions:<br>1. Drag star over to a sticky note to cast your vote.<br>2. Each person votes 3 times.<br>3. The provocation with the most votes will be used for ideation. |  |              |  |              |
| <b>Voting Stars</b>   |  |              | <b>Top Provocation #1</b>                                  |              |
|    |  |              | <div style="border: 1px solid gray; height: 114px;"></div> |              |
| <b>Part 2a:<br/>Diverging</b>   | Provocation #2   | Starter Idea | Starter Idea   | Starter Idea |
| Remove<br>Eliminate<br>Exaggerate<br>Reversal   | <div style="border: 1px solid gray; height: 256px;"></div> | Starter Idea | Starter Idea   | Starter Idea |
|   |  | Starter Idea | Starter Idea   | Starter Idea |
|   |  | Starter Idea | Starter Idea   | Starter Idea |
| <b>Part 2b:<br/>Converging</b>  |  |              |  |              |
| Use the voting stars to vote on your favorite provocative questions:<br>1. Drag star over to a sticky note to cast your vote.<br>2. Each person votes 3 times.<br>3. The provocation with the most votes will be used for ideation. |  |              |  |              |
| <b>Voting Stars</b>   |  |              | <b>Top Provocation #2</b>                                  |              |
|    |  |              | <div style="border: 1px solid gray; height: 114px;"></div> |              |



# LEAN CONCEPT CANVAS



# Lean Concept Development

Leverages the power of co-creation to ensure you are building actionable ideas rather than starter thoughts.



# Lean Concept Canvas



## What It Is

---

This technique ensures you are building actionable ideas rather than starter thoughts.

## When To Use It

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The lean canvas should be used after initial starter ideas have been generated and the team is ready to further develop the idea into a fuller concept.

The lean canvas can be used in a live session or offline homework session.



# How it Works

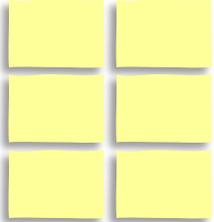
- 1** Select the concept to develop further
- 2** Expand on an element of the canvas
- 3** Discuss as a group all the content for that element
- 4** Converge and summarize the element
- 5** Repeat steps 2-4 for each element of the canvas



**8. Your Catchy Name** The name should be memorable AND relevant to the concept. It should also be the last thing you add to your concept

**1. Summary of the Starter Idea**

Describe your idea in 2-3 sentences to keep focus and put all your team on the same page.

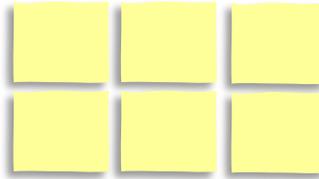


**Final Summary**

Replace this text with your converged summary

**3. Unmet Need / Pain Point**

What problems are we trying to solve? Be clear on why this is an unmet need for the organization

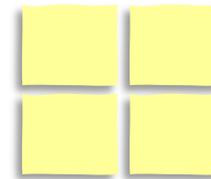


**Final Summary**

Replace this text with your converged summary

**5. Why the Stakeholder will LOVE this**

Put yourself in the shoes of each of your audiences and envision why they might be most satisfied.

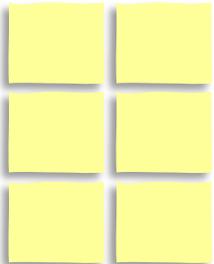


**Final Summary**

Replace this text with your converged summary

**2. Key Stakeholder(s)**

Who is the primary user of this. There may be multiple people affected. But focus on the primary beneficiary first.

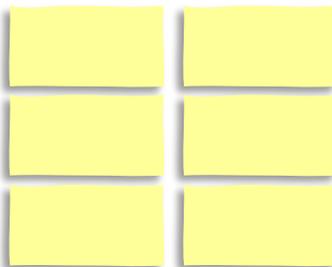


**Final Summary**

Replace this text with your converged summary

**4. Detailed Explanation of How the Concept Works?**

Describe in detail HOW the concept works. Flow of operations? Resource required? It must be comprehensive and clear.

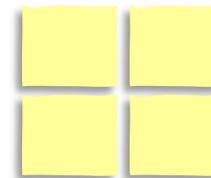


**Final Summary**

Replace this text with your converged summary

**6. Impact**

What kind of value are we going to realize as an organization?

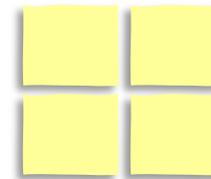


**Final Summary**

Replace this text with your converged summary

**7. Success Criteria**

The measure of success will help you better refine your concept as well as begin to assess feasibility.

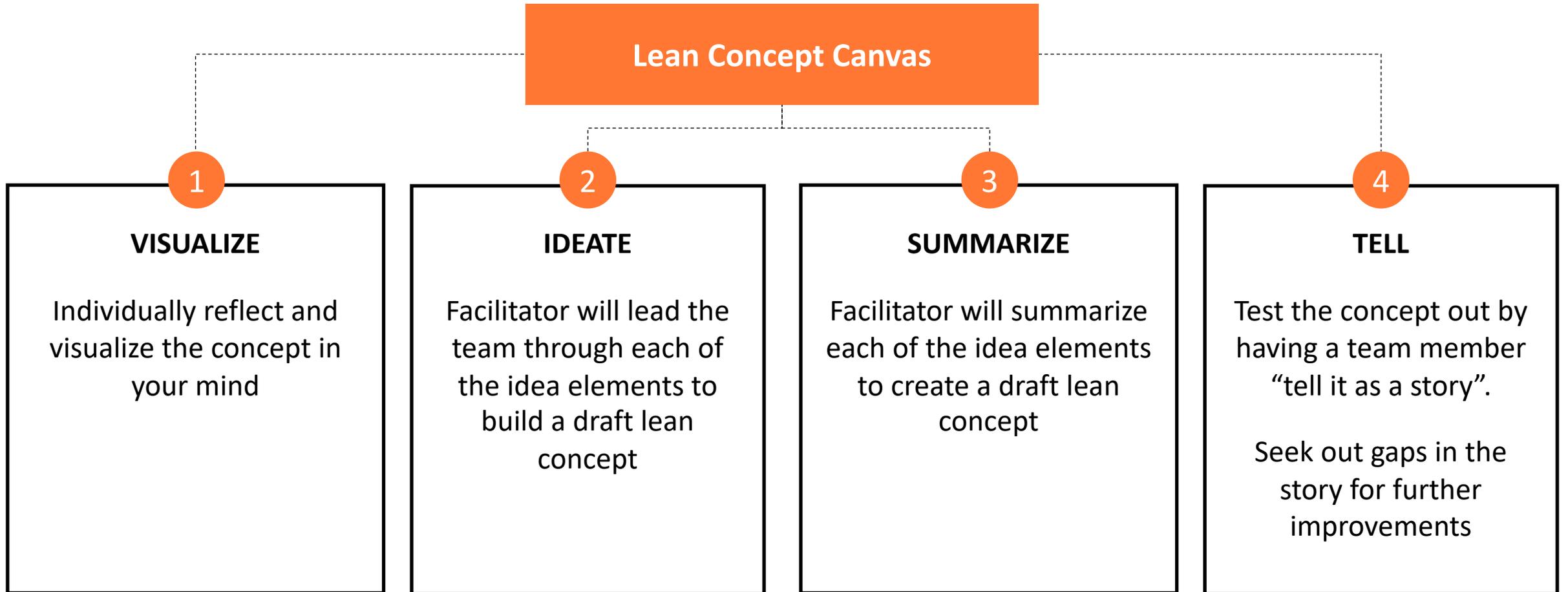


**Final Summary**

Replace this text with your converged summary



# How to Facilitate It





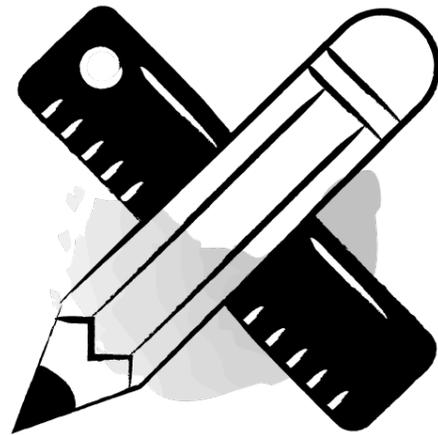
# Top Tips

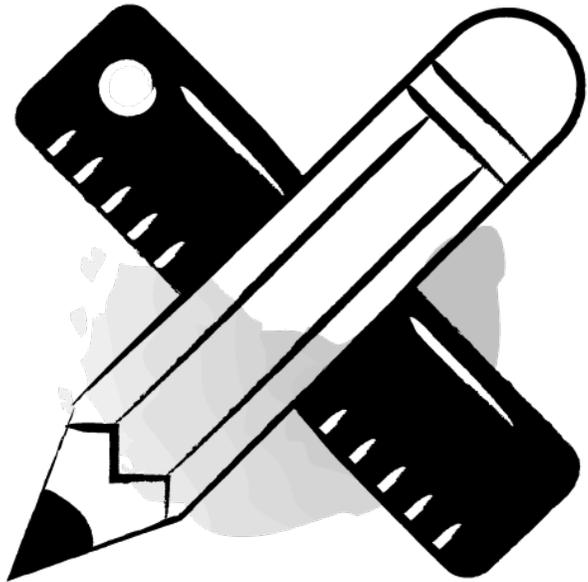
- Don't Have a Meeting with Yourself" – Allow your hands to work in parallel with your mind
- Don't Aim for Perfection" – Nobody in the room is Rodin
- "Listen before You Connect" – Look to "yes...and" your teammates by physically connecting parts of your model
- Don't be afraid to rearrange the model or use a different one
- "Iterate, Iterate and Iterate"
- Focus on the Storytelling
- Don't rush to complete the written idea developer template



# MODULE #4

*Learn*





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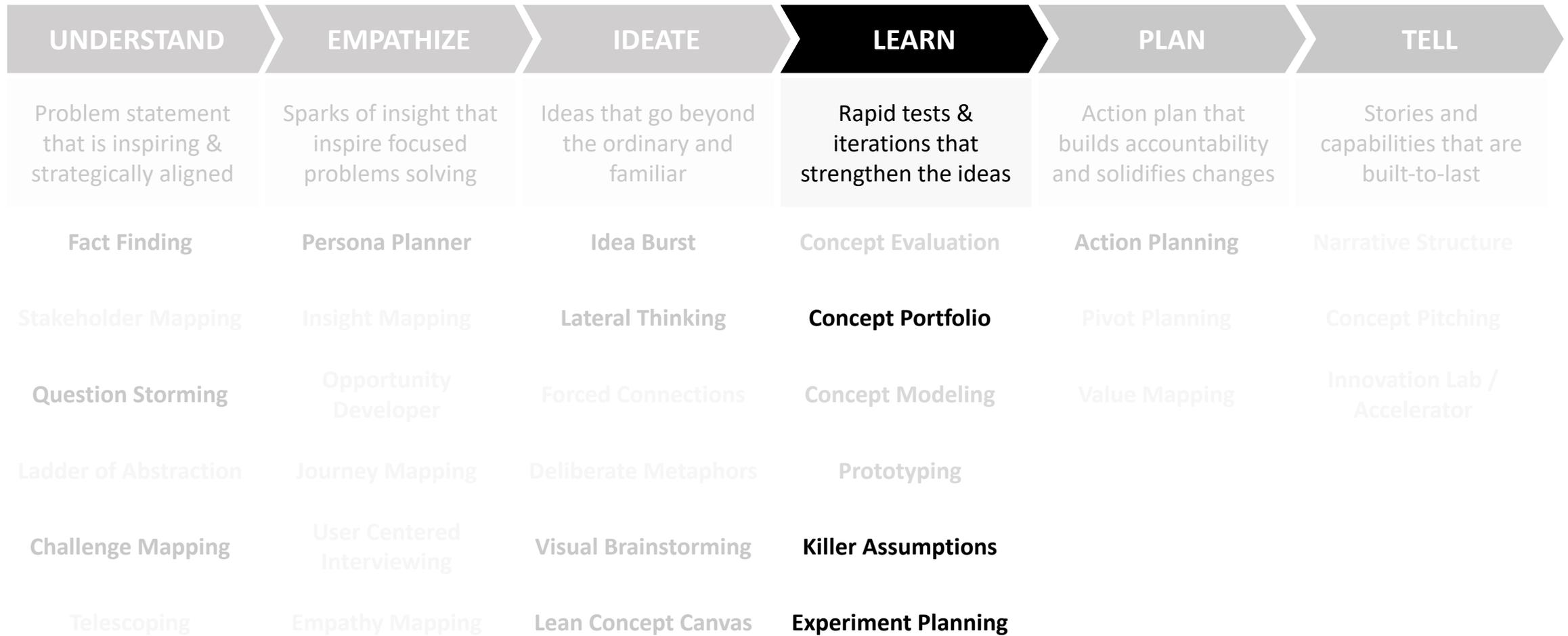
## Learning

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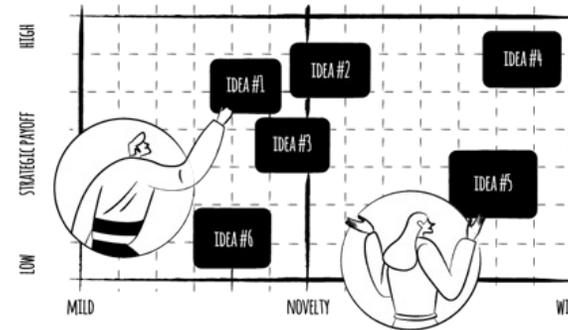
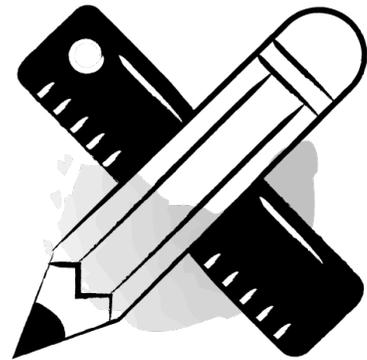
is about evaluating, testing and judging our concepts by engaging in fast learning and iteration cycles in order to strengthen them

# The Deliberate Innovation Framework

This module will focus here on the framework.

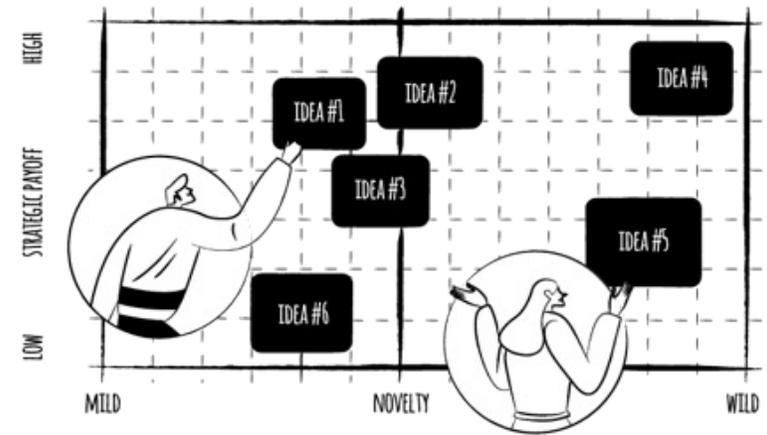


# CONCEPT PORTFOLIO

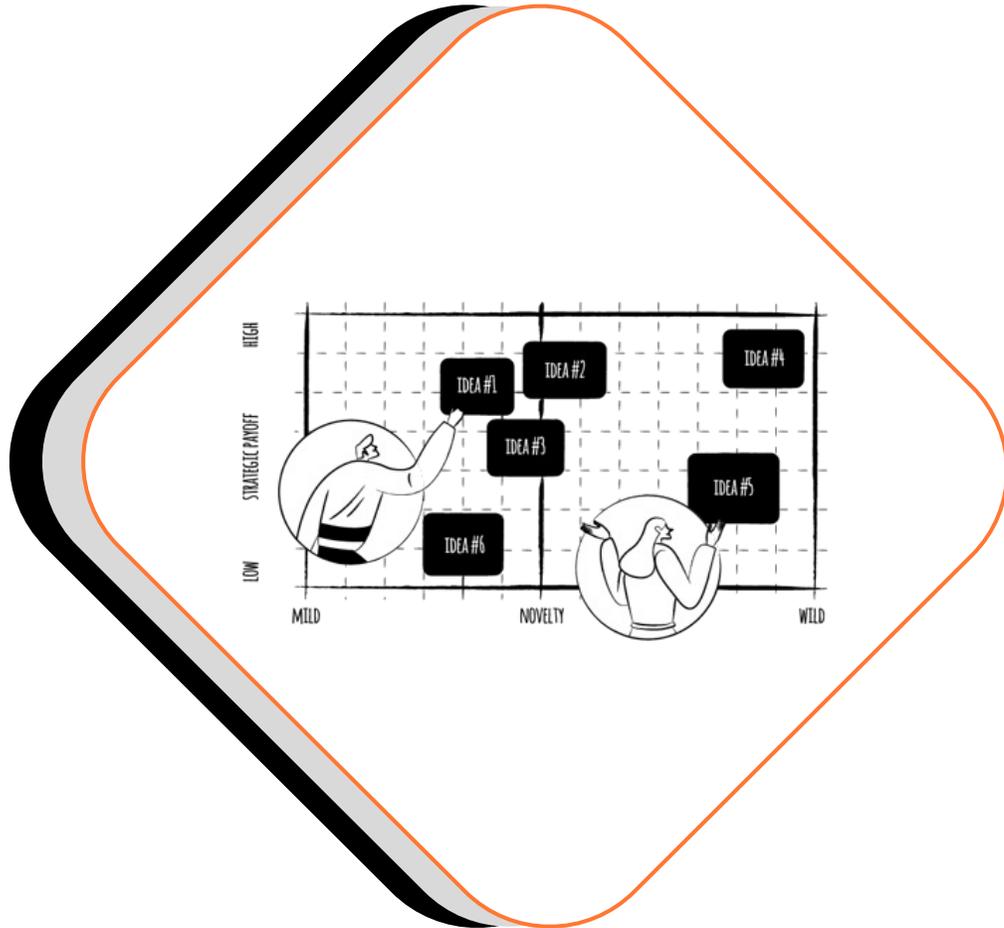


# Concept Portfolio

Is a convergence technique that ensures that teams have focus for subsequent concept development.



# Concept Portfolio



## What It Is

This convergence technique enables the mapping of concepts on 2x2 grid in order to build a portfolio of concepts in order to decide which ideas to bring forward for further development.

## When To Use It

The portfolio is useful when there are more than a few concepts to be evaluated by the team for further development. The portfolio is often used after conducted initial rounds of ideation and there is a need to evaluate on a 2–3-dimensional basis.



# How it Works

- 1** Select the ideas to evaluate
- 2** Align on the dimensions / criteria for evaluation
- 3** Map each concept by discussing/scoring the concept
- 4** Review the map, discuss concept placement & make adjustments
- 5** Select the prioritized ideas for further development



# Concept Portfolio Sample Evaluation Criteria

## Criteria

## Description and Range

### Strategic Payoff

Strategic payoff is defined as how likely this tactic will help deliver significant financial and strategic impact to the organization.

Range: Low – High

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### Novelty

Does the tactic have the promise of pushing our thinking and actions to do things different from what we have always done before

Range: Mild – Wild

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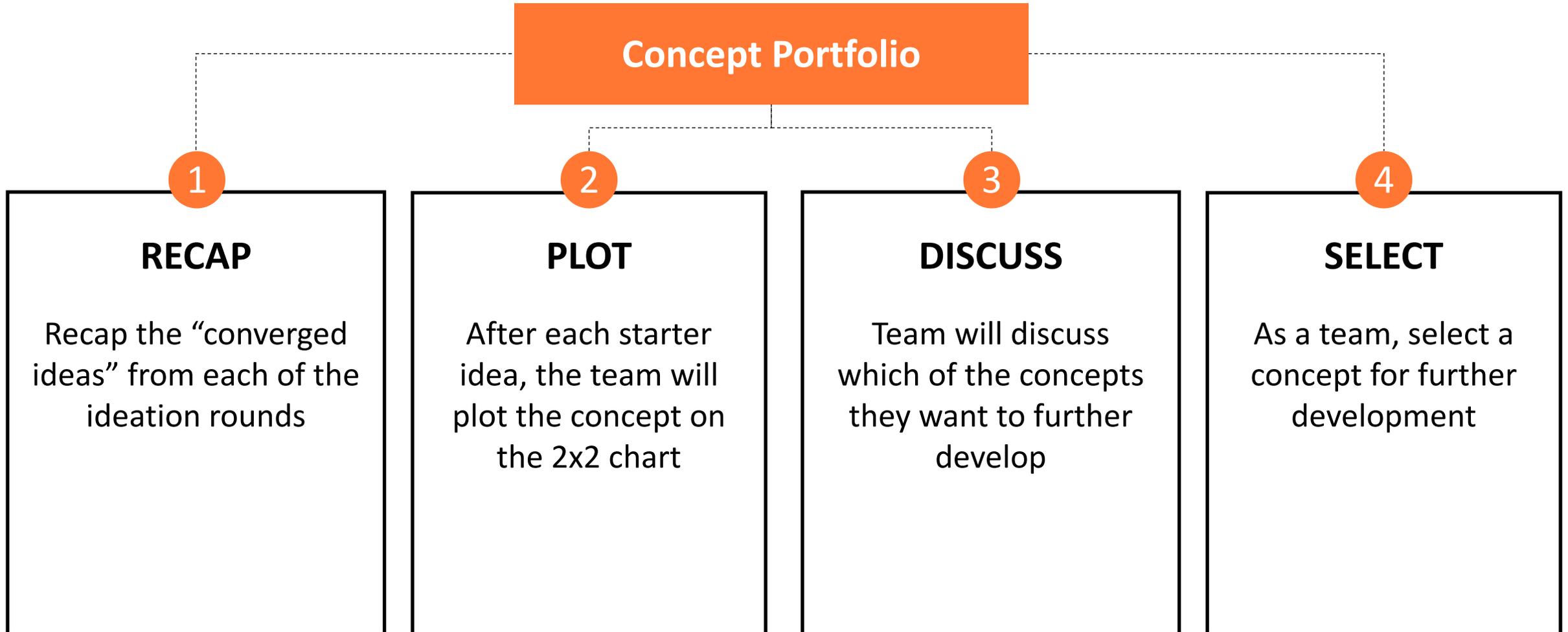
### Team Passion

Does the team have a lot of excitement and commitment to bring this idea from a starter thought to a testable concept

Range: Small – Large



# How to Facilitate It

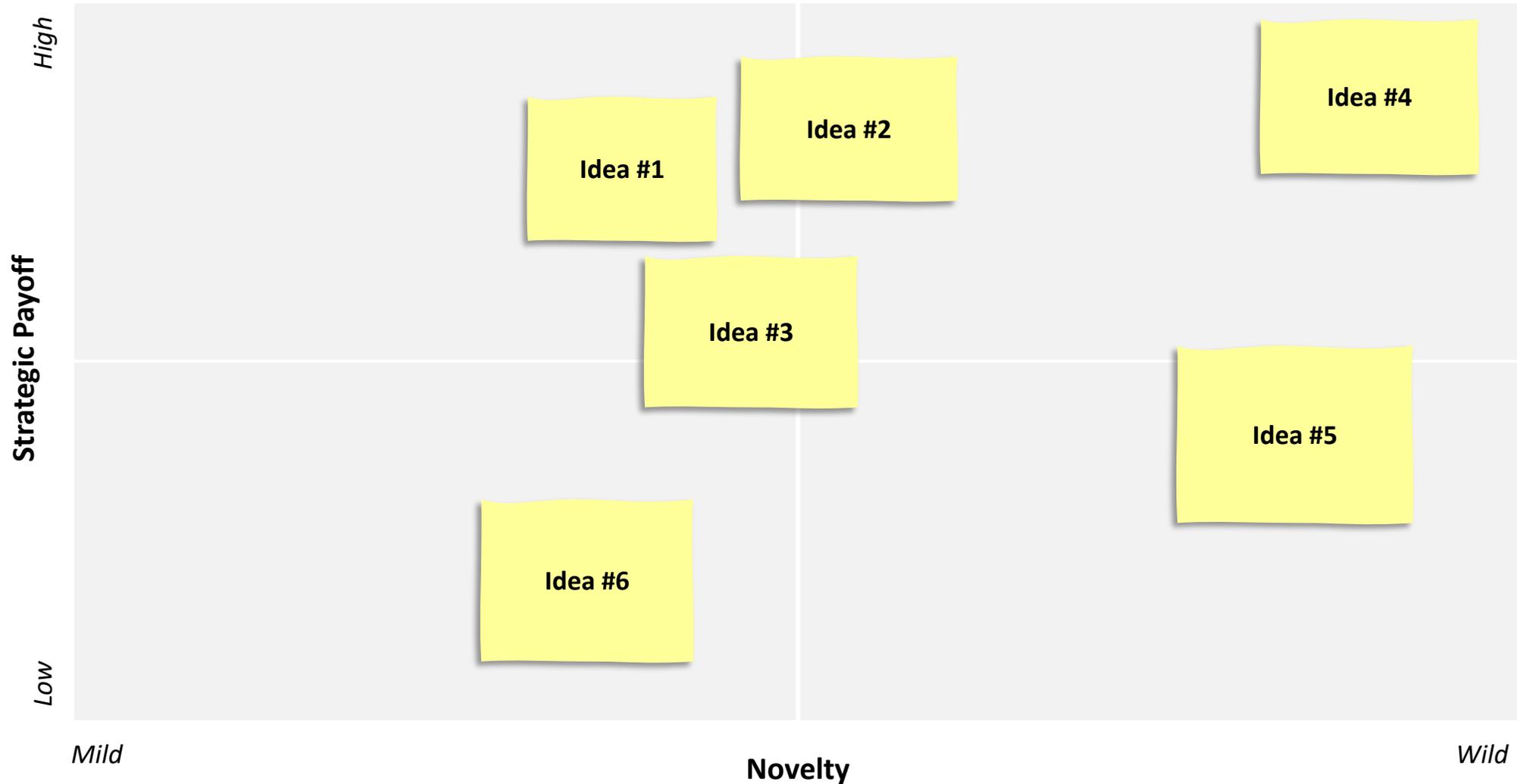


# Concept Portfolio Template

|            |            |  |
|------------|------------|--|
| Criteria 1 |            |  |
|            |            |  |
|            | Criteria 2 |  |



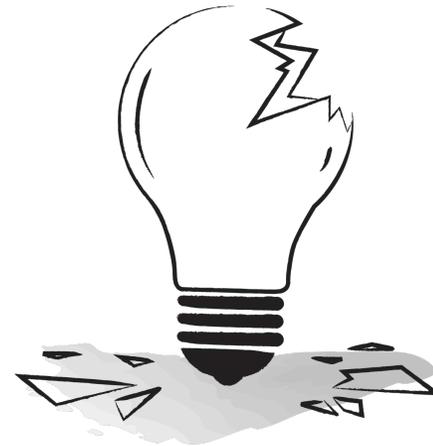
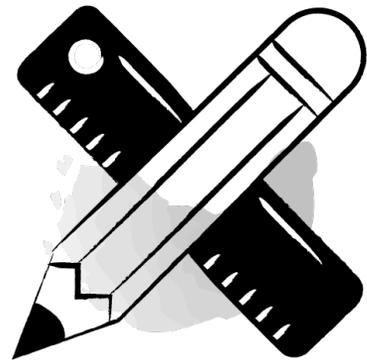
# Concept Portfolio 2x2 Chart



\* Criteria # 3: Team Passion – Size of Post-It Note



# KILLER ASSUMPTIONS



# Killer Assumptions

is a stepwise process that inventories and prioritizes the MOST important assumptions.

When developing a new concept, testing assumptions in a logical order gives you the best chance to make course corrections early — and not waste time and money.



# Killer Assumptions



## What It Is

---

This technique is a stepwise process that inventories and prioritizes the MOST important assumptions. When developing a new concept, testing assumptions in a logical order gives you the best chance to make course corrections early — and not waste time and money.

## When To Use It

---

Killer Assumptions is best used after a concept has been initially built but before you conduct testing or piloting of the concept. Killer Assumptions will help to uncover pivotable assumptions as well as inform the design of prospective experiments.

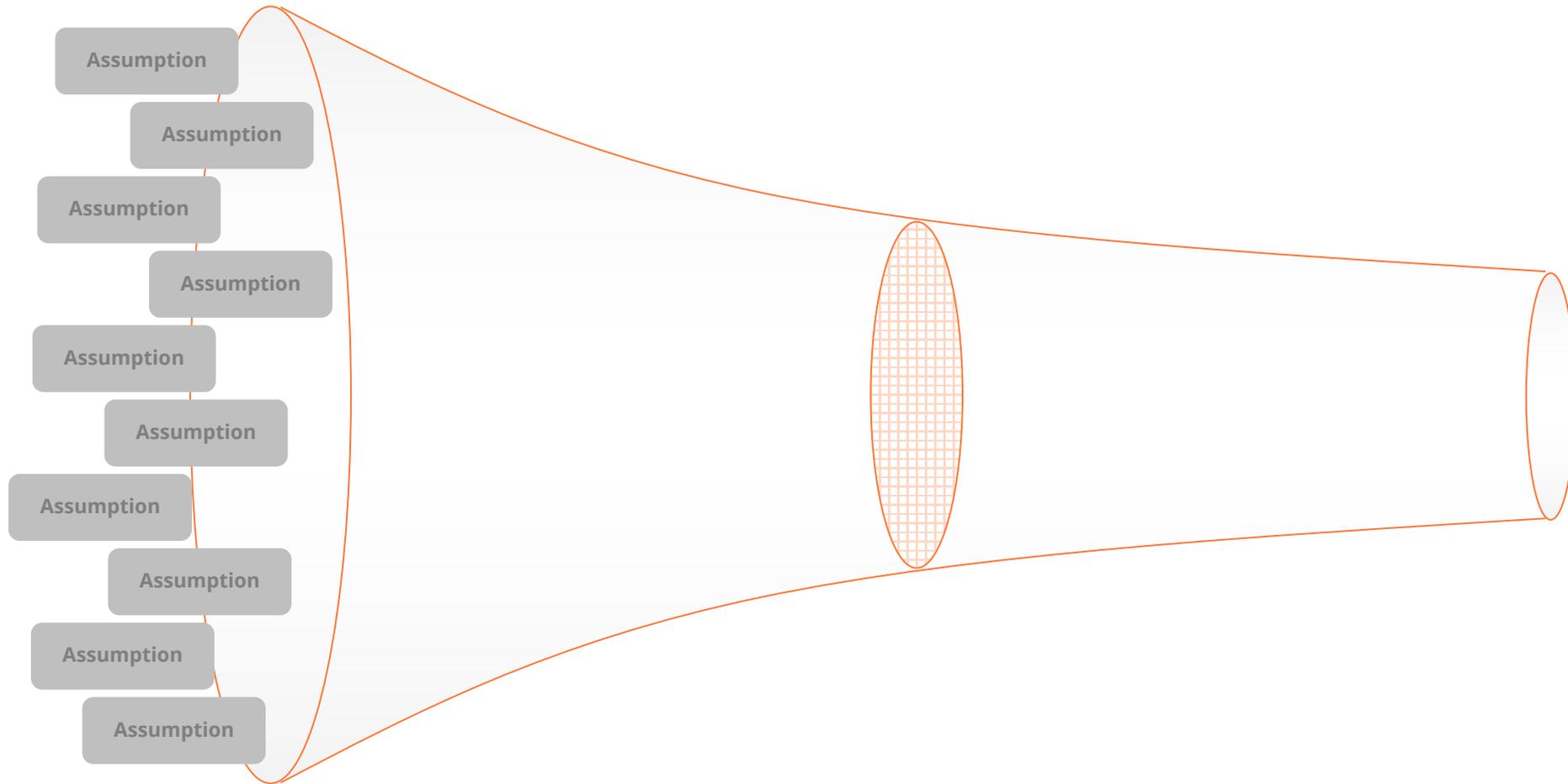


# How it Works

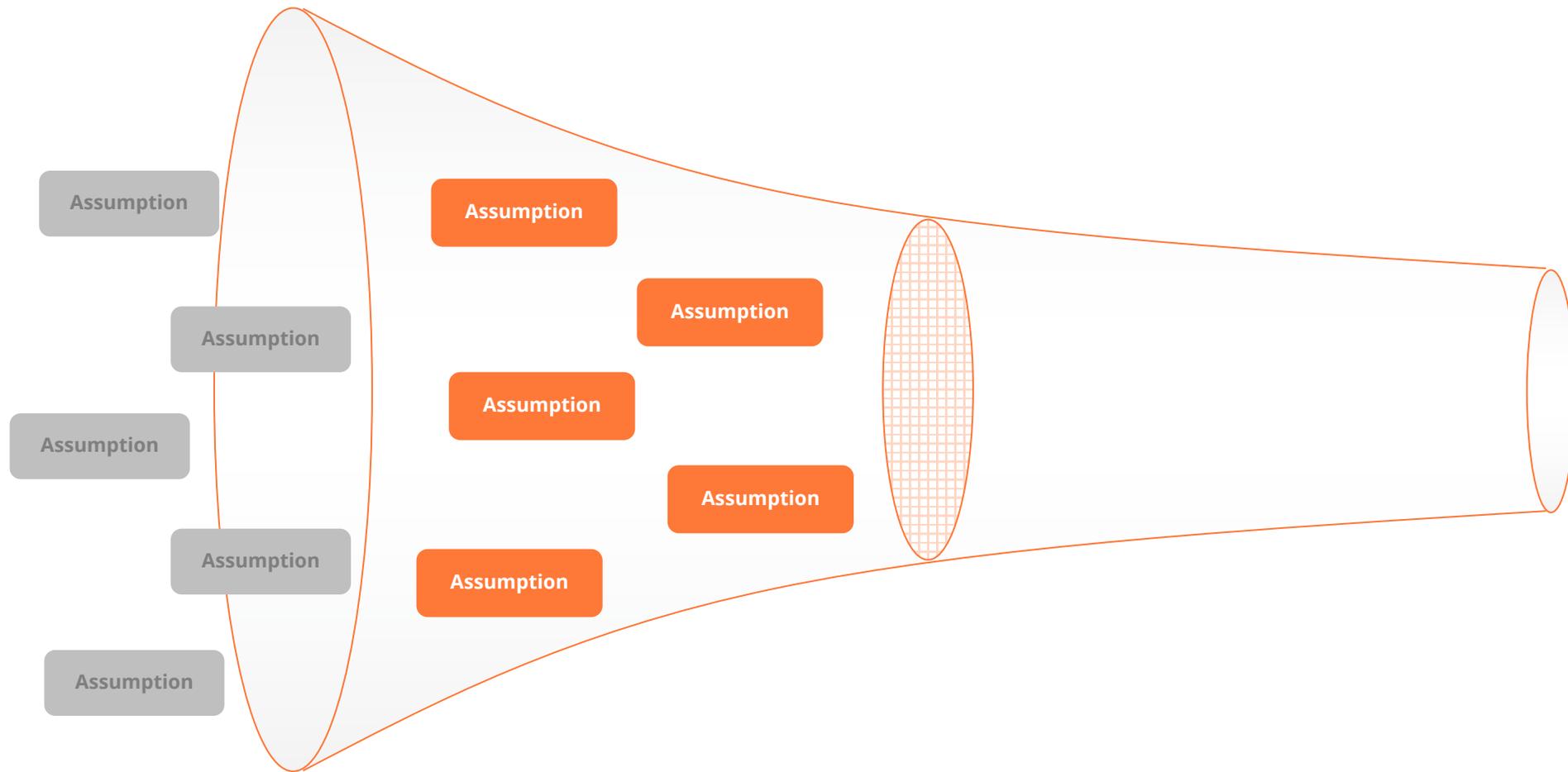
- 1** Select the idea to evaluate
- 2** List the assumptions that must hold true for this idea be successful
- 3** Determine which assumptions will have the biggest impact
- 4** Select the high impact assumptions that have the most uncertainty
- 5** Prioritize the “Killer Assumptions” from most-least important



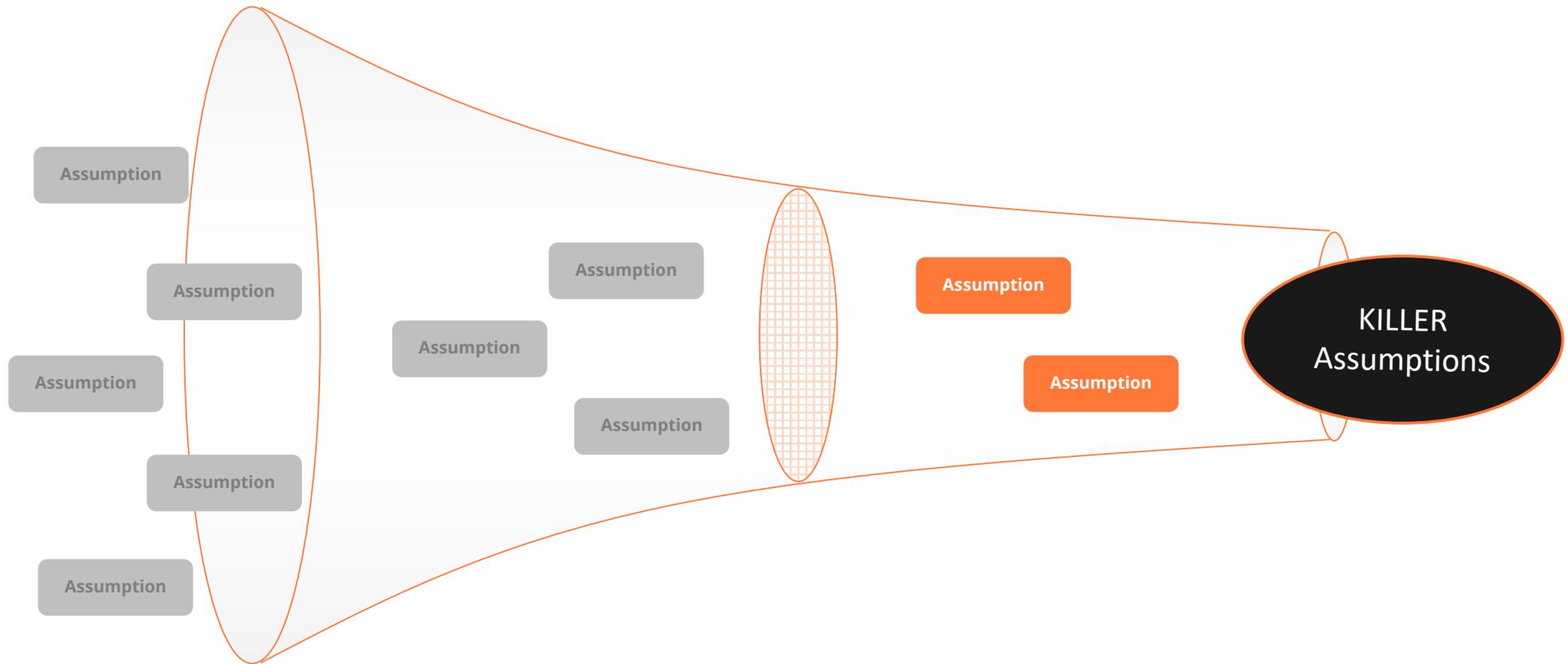
# Which assumptions must hold true for the idea to be successful?



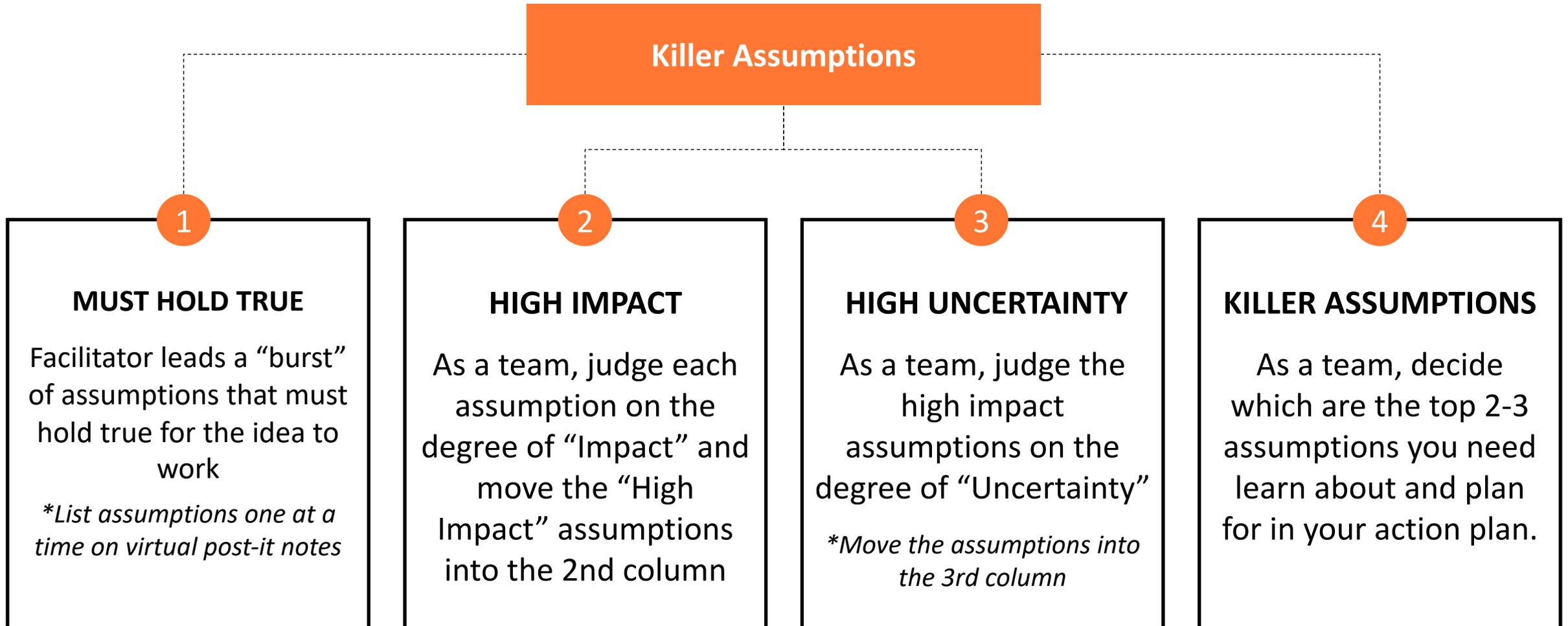
# Which of these assumption will have the highest impact?



# Which high impact assumptions are the most uncertain?



# How to Facilitate It





# Top Tips

- List assumptions one at a time on post it notes
- Be expansive - don't Judge in the First Round
- Ensure everyone understands each assumption before capturing on the chart
- Consider organizing by category
  - Here are some useful categories to consider: Financial, Operational, Strategic, Customer, Internal Politics, Legal/Compliance/Regulatory
- Facilitator should “trim” duplicate assumptions. If there is disagreement, move it forward – even if you believe it's very similar.
- When deciding if an assumption should be moved forward, if there is disagreement, move it forward – even if you believe it's easy to learn
- Teams can have multiple “KILLER” assumptions (but not everyone should be a KILLER!)



# Killer Assumptions Template

## 1. Must hold true

Individually, list the assumptions that **must hold true** for the idea to work. Weed out any duplicate ideas before moving on to step 2.

## 2. High impact

As a team, judge each assumption on the degree of **impact** and move the **high impact** assumptions into this column

## 3. High uncertainty

As a team, judge the **high impact** assumptions on the degree of **uncertainty** and move the **high uncertainty** assumptions into this column

## Killer assumptions

As a team, decide which are the top 2-3 **killer assumptions** you need to learn about and plan for in your action plan

Killer  
assumptions

Killer  
assumptions



# Assumption Screening Example

## Must Hold True

*List all the assumptions that must hold true for this idea to be successful*

Patients will put a lens in their eyes

The lens measures blood glucose consistently

The lens is affordable

The lens is more convenient than the standard of care

The company has expertise with miniaturized sensors

## High Impact

*Select the assumptions that will have the biggest impact on success of the idea IF the assumption is not met/satisfied*

Patients will put a lens in their eyes

The lens measures blood glucose consistently

The lens is affordable

The lens is more convenient than the standard of care

## Uncertain

*Select the “High Impact assumptions” that have the greatest uncertainty*

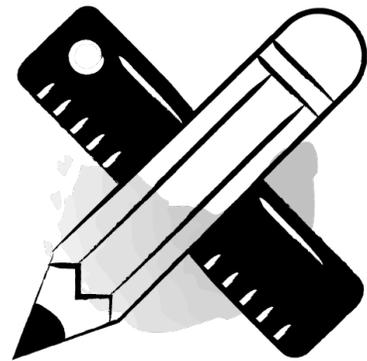
**KILLER ASSUMPTIONS**

The lens measures blood glucose consistently

The lens is affordable



# EXPERIMENT PLANNER



# Experiment Planner

helps you manage risk by rapidly and inexpensively testing the killer assumptions on a small scale so you can accelerate learning and ultimately iterate on your concept.



# Experiment Planning



## What It Is

---

This technique helps you manage risk by rapidly and inexpensively testing the killer assumptions on a small scale so you can accelerate learning and ultimately iterate on your concept.

## When To Use It

---

Experiment planning can be conducted early and often when developing your concept. Typically, it is most useful to run an experiment when you've identified a killer assumption(s) that you need to learn about. We recommend running serial experiments and doing them often. Please note, it may be a challenge to "sell in" experiments to colleagues that are accustomed to operating on gut instinct, especially for someone who's been on the job for years.



# How it Works

- 1** Identify your killer assumption(s)
- 2** List out the specific learning objectives
- 3** Define your target audience (think about a persona / profile)
- 4** Design a creative test(s) that helps you to learn quickly and inexpensively
- 5** Determine how you will measure and assess your performance on the tests



# Experimentation Principles

Test most  
risky elements

(vs. the entire concept)

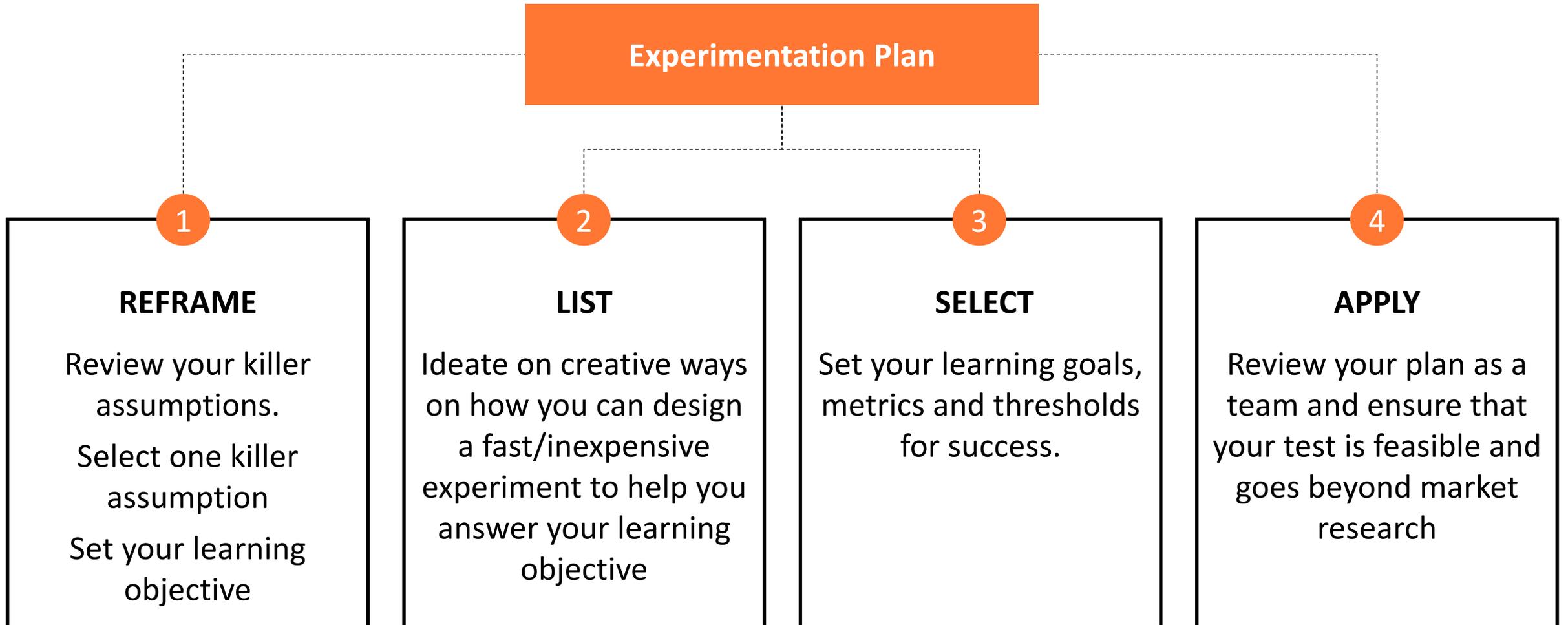
Rapid and  
low-cost tests

Learn from  
experience

Validate,  
iterate or kill



# How to Facilitate It



# Experimentation Learning Plan

## 1. Killer Assumption



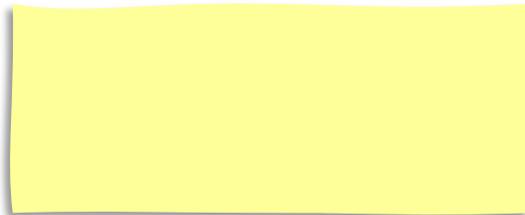
## 2. What Do You Need to Learn (Hypothesis)?



### Final Summary

Replace this text with your converged summary

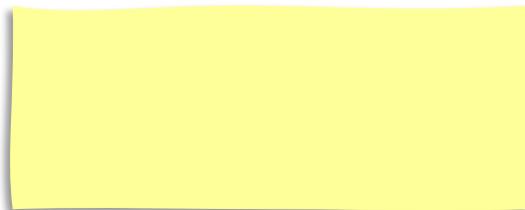
## 4. What Metric(s) Will You Use to Measure?



### Final Summary

Replace this text with your converged summary

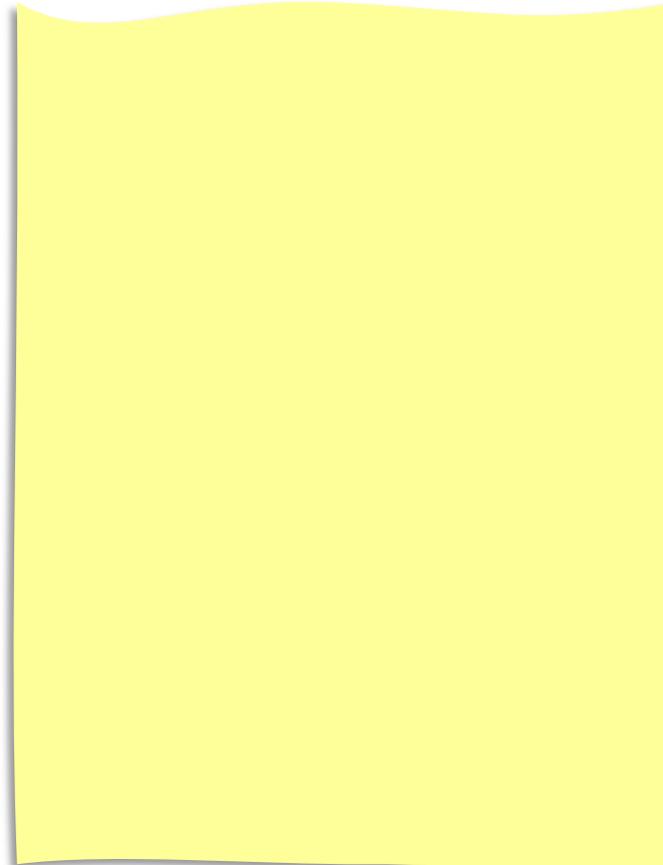
## 5. What is the Success Criteria for the Metric?



### Final Summary

Replace this text with your converged summary

## 3. Detailed Description of Experiment



### Final Summary

Replace this text with your converged summary



# Top Tips



- **Focus:** Focus on one assumption at a time versus testing the entire concept
- **Don't Forget Your Creativity!** There are more than a dozen creative forms of experimentation (beyond surveys) that will allow you to capture behavioral data and not just stated intentions or preferences.
- **Prototypes:** If you want authentic feedback, you need to bring to life your concept and the specific areas of focus that you want to test. The higher the fidelity of the concept, the more realistic to the feedback and reliable it will be.
- **Measurements:** Be sure to select a combination of lagging and leading metrics so you have a combination of meaningful metrics and track progress frequently
- **Assume Multiple Tests:** No innovative idea has only a single risky assumption. Assume you will be conducting serial experiments and plan to stage them.
- **Team Based Approach:** Include cross functional creative thinkers when designing rapid and low-cost experiments
- **Failure and Pivots:** Plan to Incorporate the learnings into your concept and make adaptations as you go along.



# MODULE #5

## *Plan*





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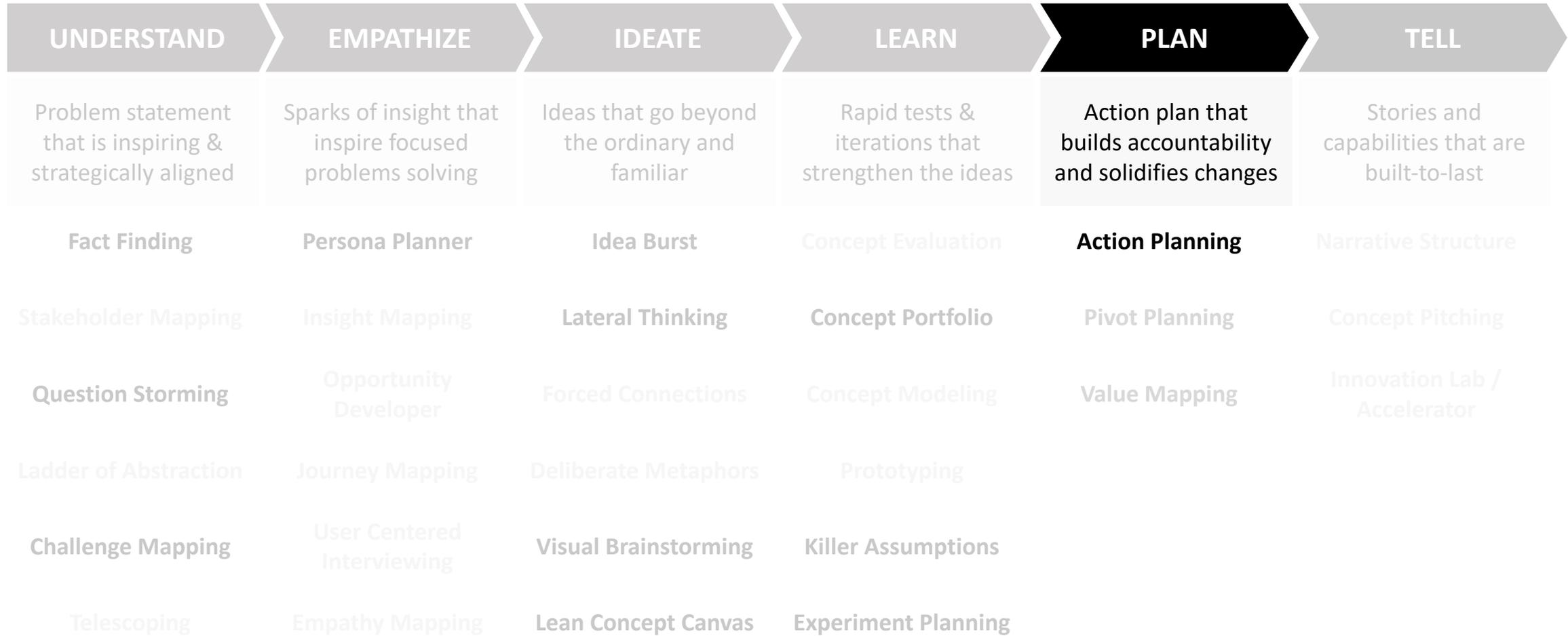
## Planning

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is the process of setting and memorializing goals with tangible actions and team commitment to achieve the desired outcome

# The Deliberate Innovation Framework

This module will focus here on the framework.



# ACTION PLANNING

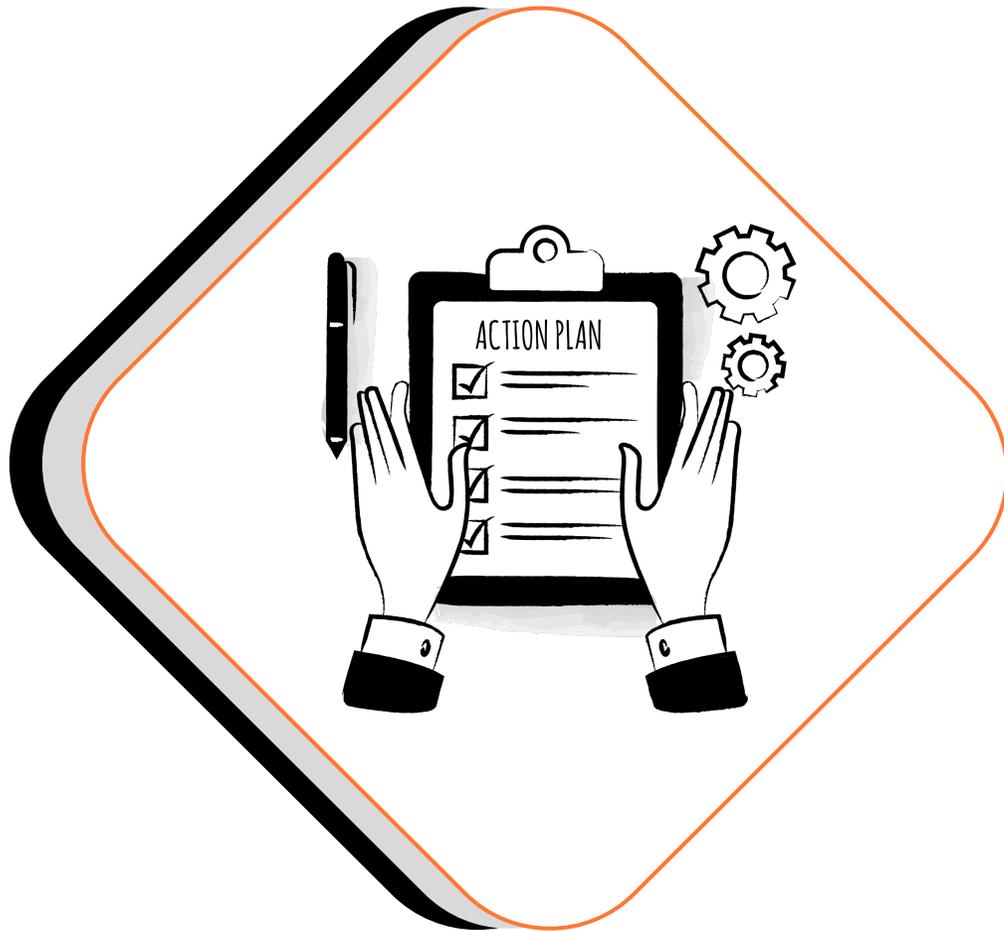


# Action Planning

is a project management driven process that ensures that you turn your ideas into measurable actions to ensure the team maintains momentum after the workshop has finished.



# Action Planning



## What It Is

---

Action planning is a project management driven process that ensures that you turn your ideas into measurable actions to ensure the team maintains momentum after the workshop has finished.

## When To Use It

---

Action planning should be used before any workshop or working session is complete. It ensures that a clear set of steps and executable actions are detailed so that the team has a path forward after the ideation and experimentation planning is done.

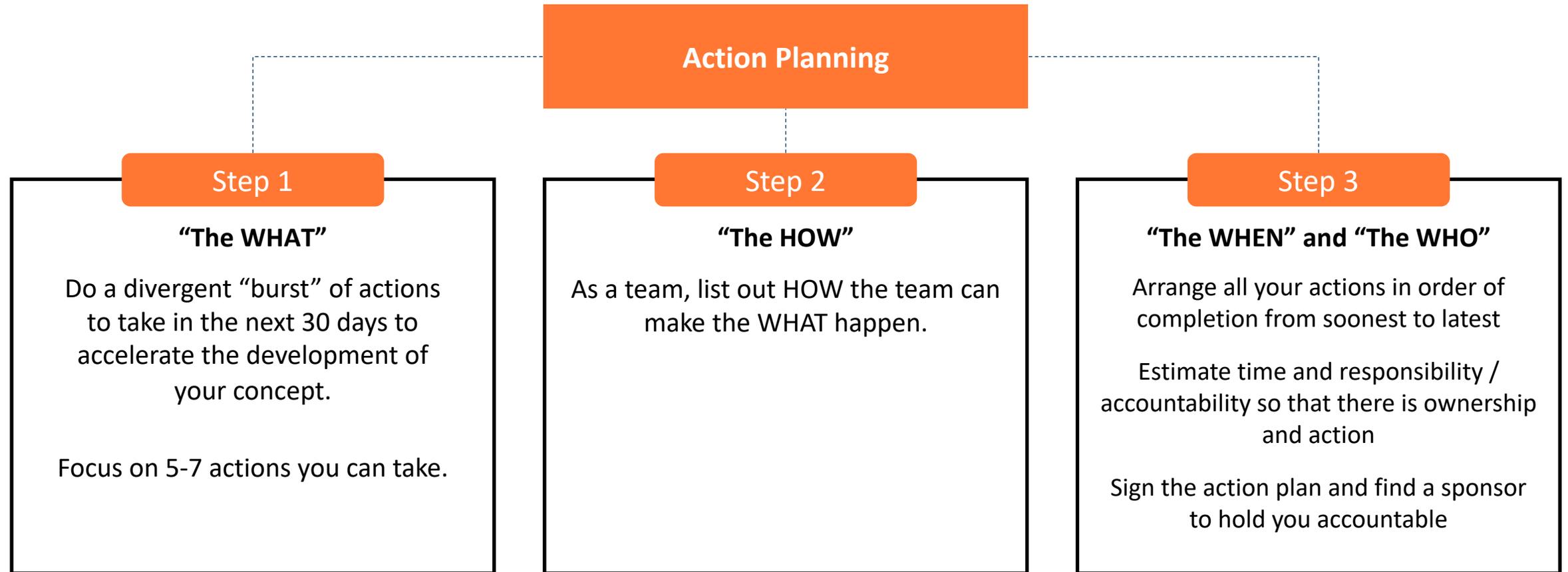


# How it Works

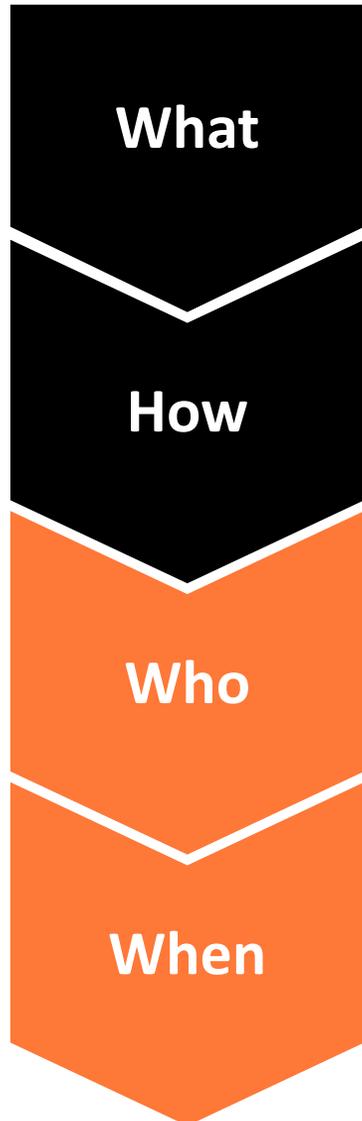
- 1 Identify** the overall mission and time horizon for the action plan
- 2 List** WHAT actions must be taken to accelerate the project
- 3 Determine** HOW you will fulfill each “What” action
- 4 Assign** timelines and accountabilities/responsibilities for each action
- 5 Commit** to the plan by signing a formalized ‘commitment contract’



# How to Use It



# Action Planning for Momentum



Generate the actions that must be taken to quickly test, learn and accelerate the project from concept to reality

Bring realness to the actions & propose HOW you will approach each WHAT

Start assigning accountabilities:

- Who is taking care of what?
- Who is the owner of an action and accountable?
- Who is supporting?
- Who needs to be informed?

Formalize the commitment by aligning actions and deadlines with team diaries

Divergent

Convergent

Concept Name: \_\_\_\_\_

| <b>What</b><br><i>What do we need to do in the next 30 days to build momentum behind this?</i> | <b>How</b><br><i>How do we make the "What" happen?</i> | <b>Who</b><br><i>Who will be accountable?<br/>Who will be responsible?</i> | <b>When</b><br><i>When will we start?<br/>When will we finish?</i> |
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Accountability Commitment: \_\_\_\_\_



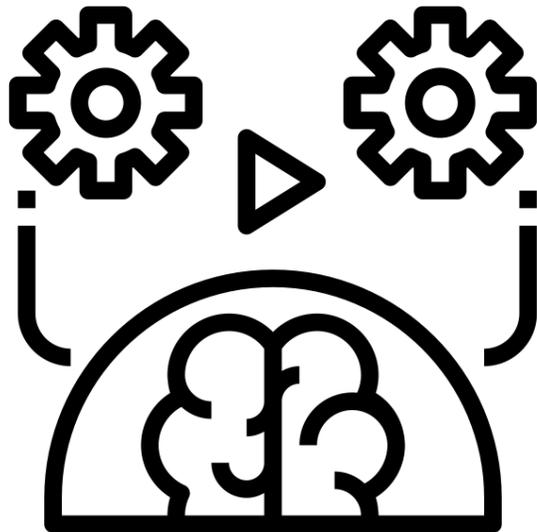
# Top Tips

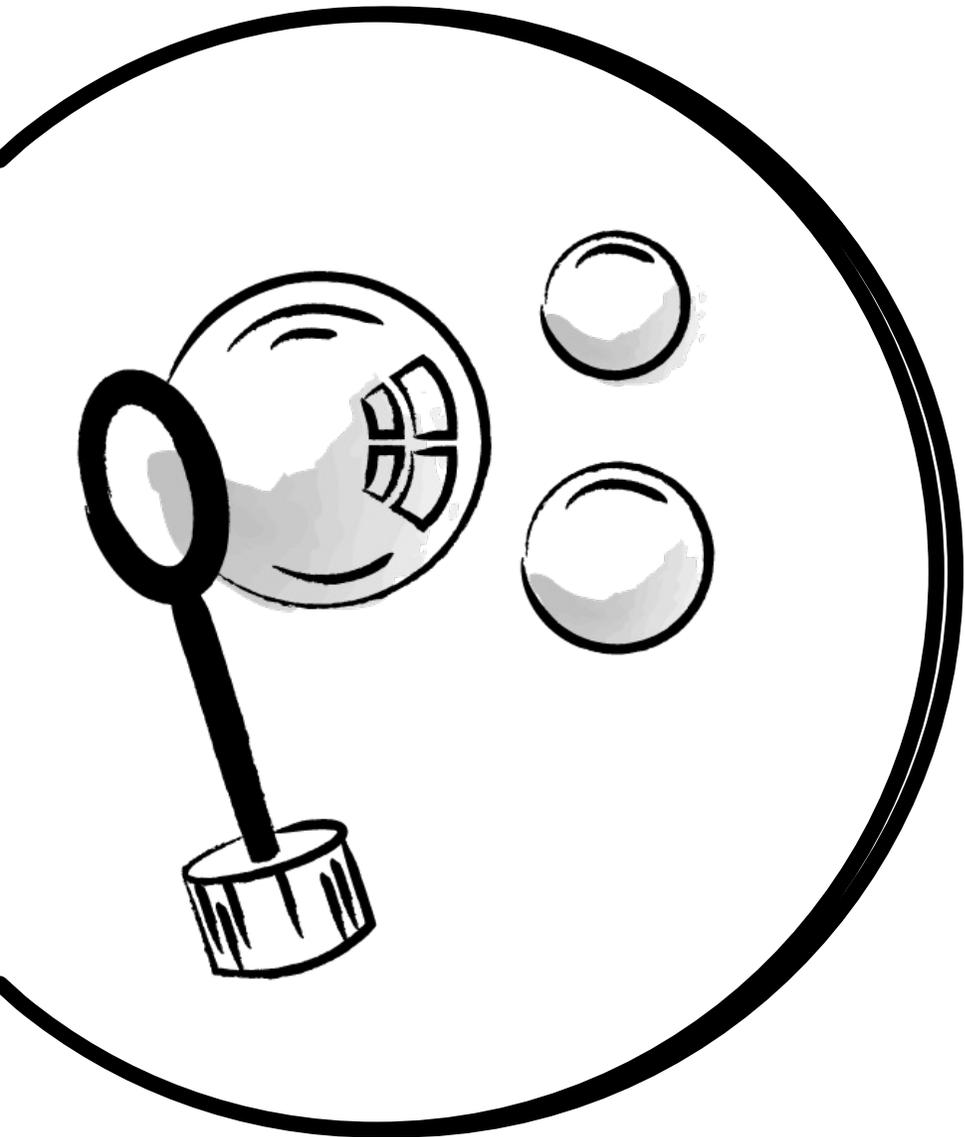


- Start by making an expansive list of WHAT you need to plan and HOW you will accomplish it
- Only after you have create the WHAT and HOW, assign accountability to WHO and WHEN
- Plan for the next 30 days
- Think about (1) what you need to learn (2) what logistics need to be addressed and (3) who you need to communicate with
- Bring in different perspectives and expertise to help detail the action steps
- If you want to ensure that action happens, incorporate the commitment contract to have colleagues hold you accountable



# INNOVATION BEHAVIORS





# PLAY

A practice of injecting humor, fun, and game design into everyday situations so we can accelerate learning and collaborations to be in a more open mindset.



# Play



## What It Is

---

A practice of injecting humor, fun, and game design into everyday situations so we can accelerate learning and collaborations to be in a more open mindset

## When To Use It

---

We have been taught that work and play are different, and play is unproductive or lacks gravitas. But play is about letting go and being in-the-moment. Use it in your teams to shift the mindset, introduce a difficult topic, or "break-the-ice" with new people.



“Our ability to play throughout life is the single most important factor in determining our success and happiness.”

**Dr. Stuart Brown,  
National Institute of Play**

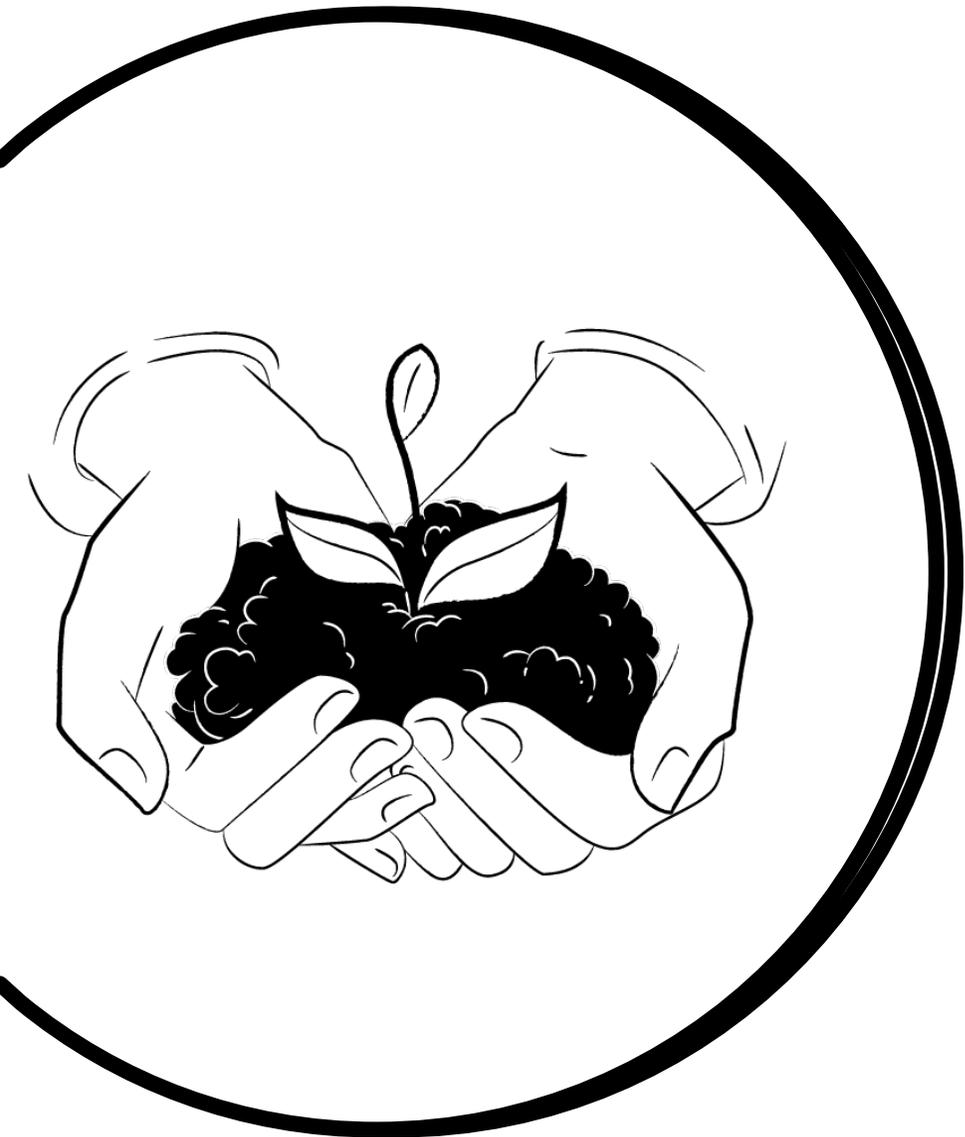


# How to Practice Play



- **Energizers:** Bring in a playful, 5-minute activity at the start of your meeting to change the mindset of your team. Science says teams that start with a small activity at the start will produce more novel ideas than teams who don't.
- **Environment:** Mix up your work environment. Have a meeting outside, change up your Zoom background, add music at the start of your meeting
- **Game Mechanics:** Gamify your everyday routines and activities
- **Permission:** Give yourself, and peers, permission to be playful
- **Suspend Judgment:** Hold off on critiquing what is fun for others
- **Small Steps:** Do one small playful thing EVERY day



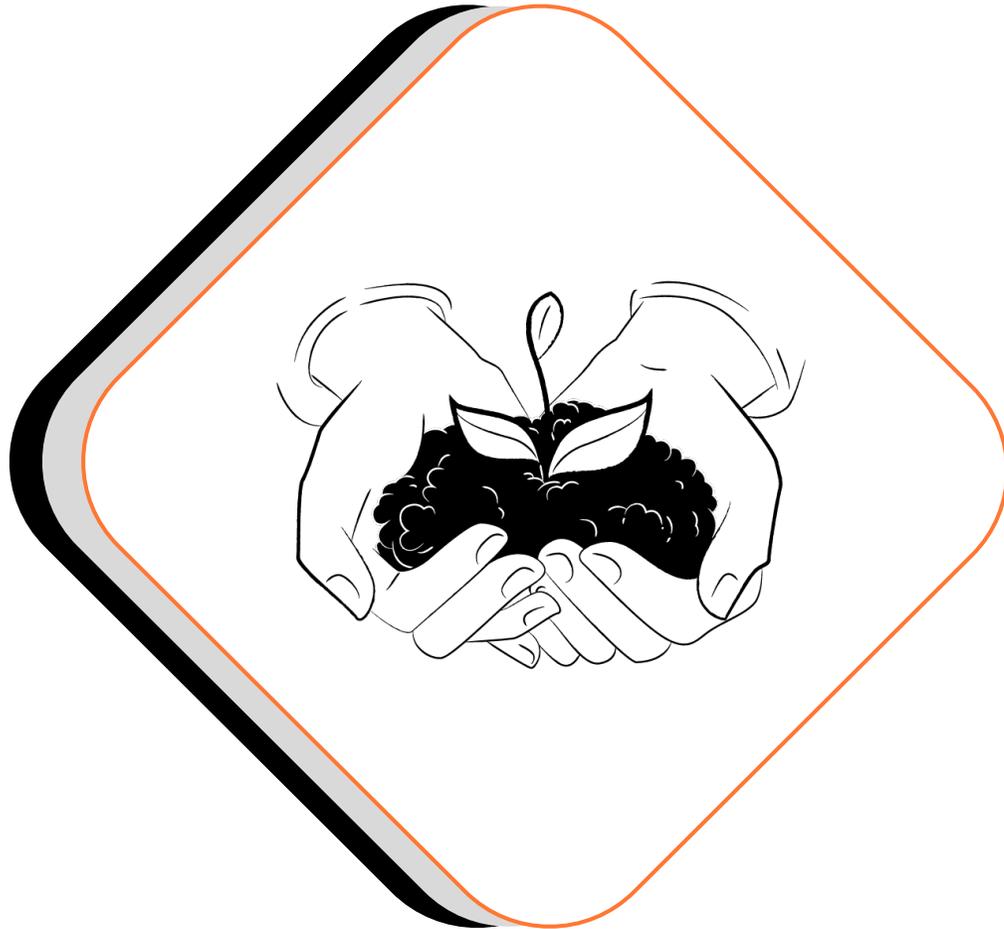


# **NURTURING**

is about protecting and encouraging each other's ideas to help them grow until they are ready to be judged.



# Nurturing



## What It Is

---

A cornerstone innovation behavior which guides us to protect and encourage each other's ideas to help them grow until they are ready to be judged.

## When To Use It

---

Nurturing is a behavior and a habit that we need to practice all the time. You should practice this behavior when a colleague presents a new and/or unfamiliar thought. Nurturing can be used anywhere that new ideas are shared, formally or informally. This includes in team meetings, working sessions, client calls and workshops.



# How to Practice Nurturing

When you are receiving a thought / idea from a colleague, it is important to do the following:

(1) Defer judgment (2) Ask for clarification/understanding (3) Contribute or build on the offering.

**Here are 3 expressions that can help you to practice nurturing:**

*“Tell me more”*

*“...and what  
if we...”*

*“Yes... and”*



# The Purpose of “Yes...And”

## YES,

- Appreciation
- Acknowledgement
- Heard
- Validation
- Encouragement
- Acceptance

## AND...

- Adding
- Building
- Collaborating
- Connecting
- Inspiring
- Creating



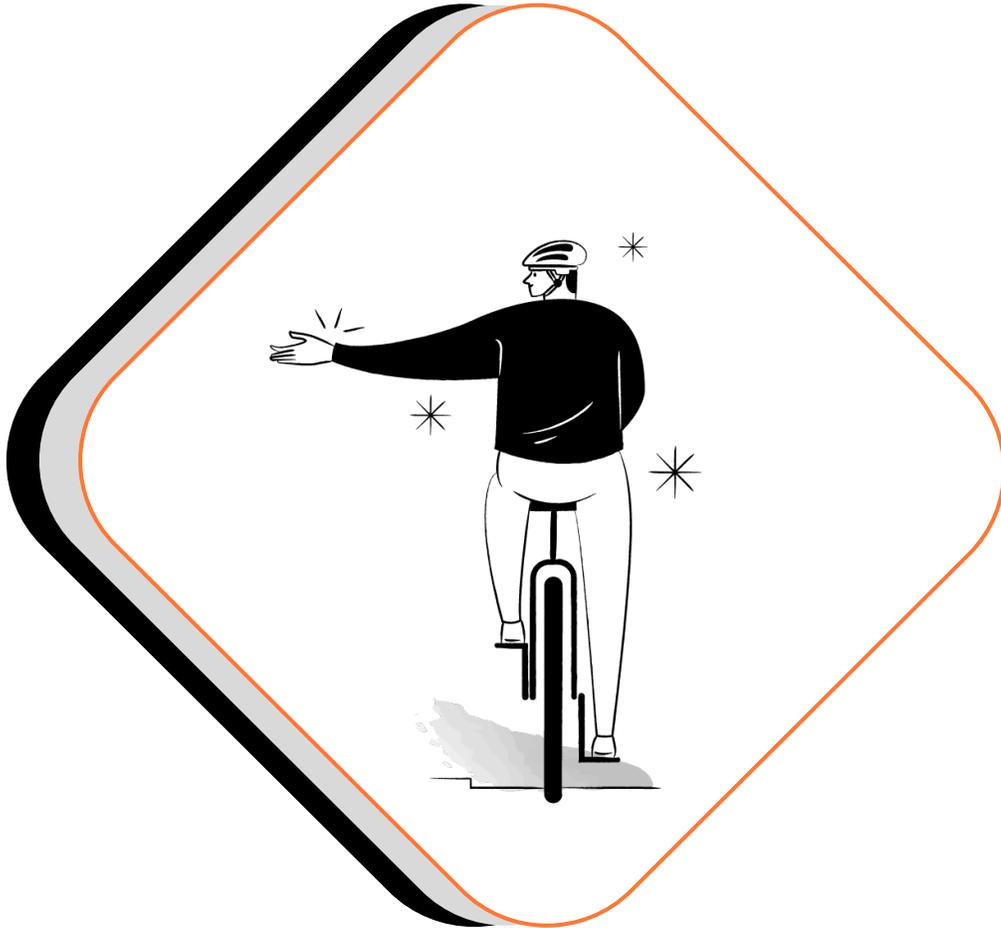


# SIGNALING

is about navigating  
between **divergent** and  
**convergent** thinking styles.



# Signaling



## What It Is

---

Verbal and non-verbal cues that can be used to indicate whether your audience should be in a divergent or convergent mindset.

## When To Use It

---

Anytime you need your audience to switch their thinking styles. Specifically, when you require your audience to generate possibilities, you can signal that it is time to be in a divergent, or more expansive, mindset. Likewise, when it is time to make choices and narrow your selection, the act of signaling cues your audience to move away from generating options and shift to making deliberate choices.



# How to Practice Signaling

Both non-verbal communication and word choice plays a vital part when it comes to signaling. Be clear on what mindset you want the receiver of your thought to be in.

Here are 3 expressions that can help you to practice signaling:

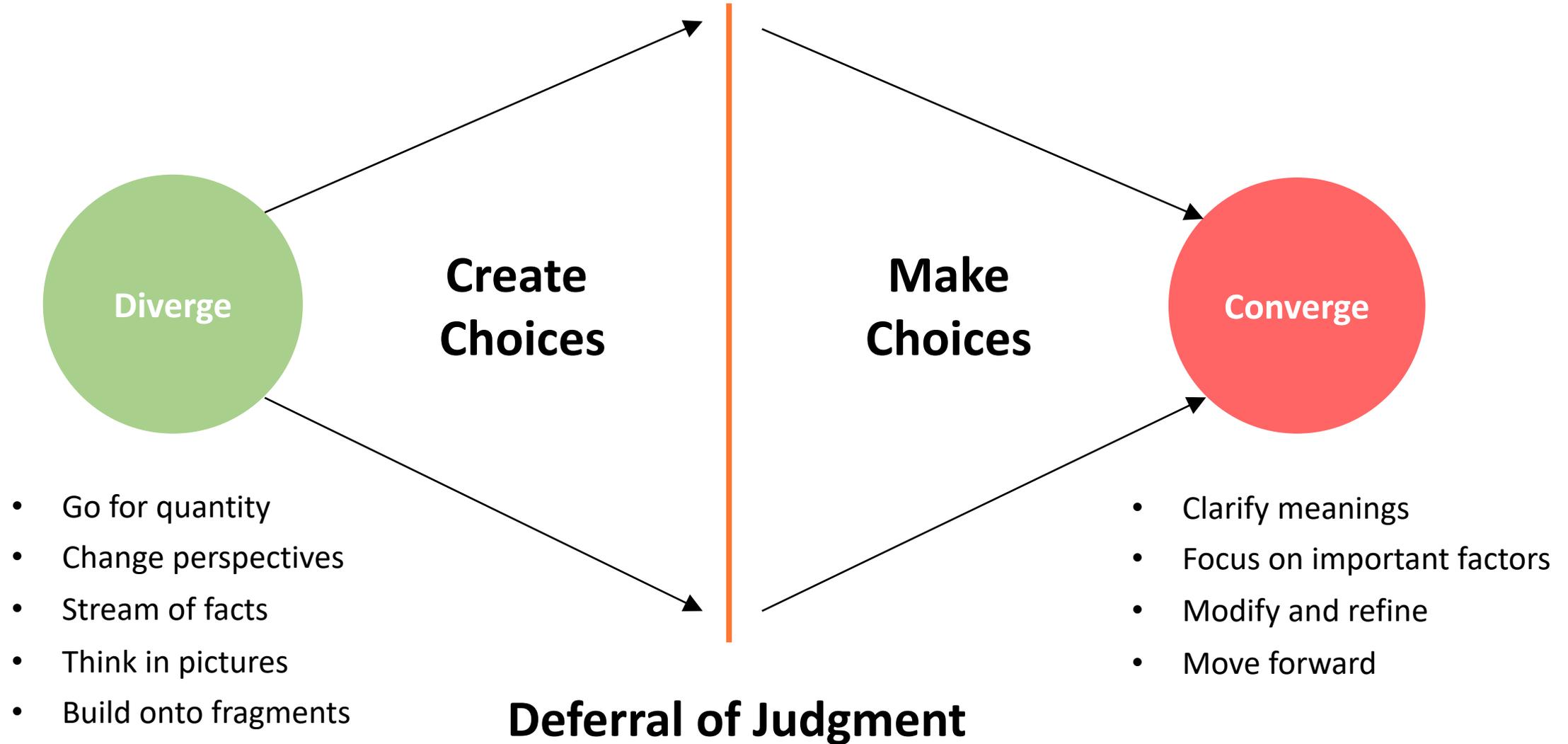
*"What I need from you is..."*

*"Can you help me build this idea?"*

*"This idea is not ready to be judged yet..."*



# Divergent vs. Convergent Mindsets





# QUESTIONING

is the practice of constantly asking the right questions, instead of providing the right answers, to challenge common wisdom and deepen understanding.



# Questioning



## What It Is

---

The practice of constantly asking the right questions, instead of providing the right answers. It is the foundation of a learner's mindset. The intention of this behavior is to remind us to challenge common wisdom and deepen our understanding.

## When To Use It

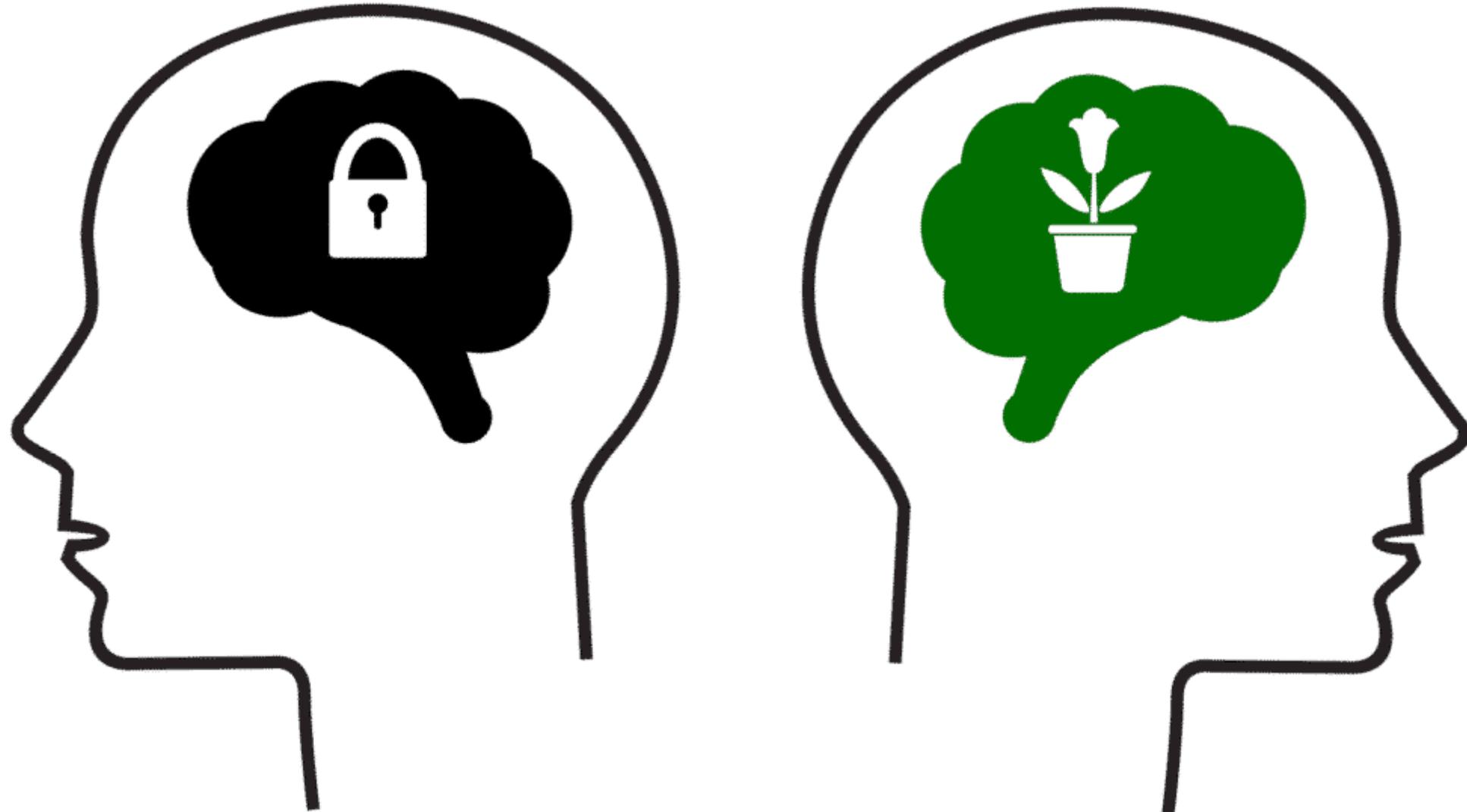
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Anytime you are at the beginning of a project, an engagement with a client, or new scope of an existing project and the situation is not well understood by you.

Practice questioning even if the client or project lead tells you the engagement is well defined when you first start. At best you will uncover new information for all parties and at worst you will come-up-to-speed quickly because everyone already has the answers.



# The Tale of Two Mindsets: The Knower vs The Learner



# How to Practice Questioning



**Contribute** to a culture of psychological safety that encourages questions

**Refrain** from jumping to answers immediately when faced with a problem

**Seek** to understand before arriving at conclusions

**Ask** many questions rather than seeking the “perfect question”

**Practice, Practice, Practice**





# RULE BENDING

The mindset and practice of knowing the rules yet finding creative ways of pushing the boundaries, bending the rules and reinventing the way a game is played. Breaking the rules just for the sake of it makes no sense.

Continually challenging everything is not courage but a lack of focus. The pressure to conform is self-imposed. That is why we must intentionally remind ourselves to get out of our “Rivers of Thinking” and to challenge ourselves to think about how we can bend or break a rule.



# Rule Bending



## What It Is

---

The mindset and practice of knowing the rules yet finding creative ways of pushing the boundaries, bending the rules and reinventing the way a game is played. Breaking the rules just for the sake of it makes no sense. Continually challenging everything is not courage but a lack of focus. The pressure to conform is self-imposed. That is why we must intentionally remind ourselves to get out of our “Rivers of Thinking” and to challenge ourselves to think about how we can bend or break a rule.

## When To Use It

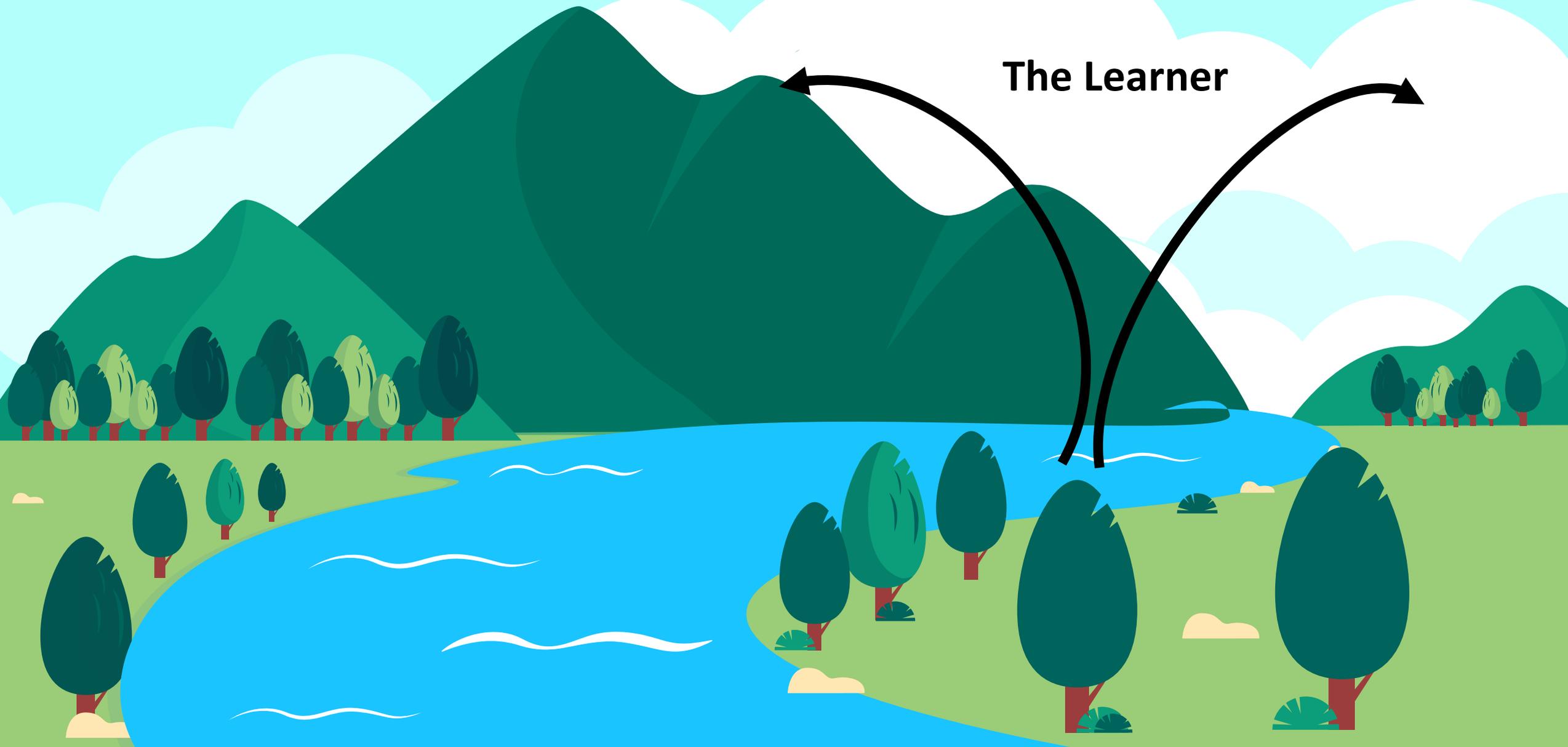
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There are right times and wrong times to bend the rules. Understanding when to break the rules requires wisdom and judgment. Corporate rules tend to limit people rather than enable them to do more and better. The litmus test we recommend is to ask if the rule is holding back progress and possibility. But just as importantly, before breaking a rule, evaluate if the outcome is worth it. Will the outcome justify the consequences of bending or breaking that rule.



# “The Rivers of Thinking”

The Learner





# THOUGHTFUL RISK TAKING

The experimenter's mindset accepts that there is no such thing as perfect. We learn through serial tests and trials and failure is a normal part of the learning process. Because innovation requires risk, experimenting enables us to systematically manage risk and accelerate learning and development.



# Thoughtful Risk Taking



## What It Is

---

The experimenter's mindset accepts that there is no such thing as perfect. We learn through serial tests and trials and failure is a normal part of the learning process. Because innovation requires risk, experimenting enables us to systematically manage risk and accelerate learning and development.

## When To Use It

---

When developing and/or testing out a new idea that is rife with uncertainty and risk. The risk taker's mindset allows you to carefully calibrate investment, risk and rewards.





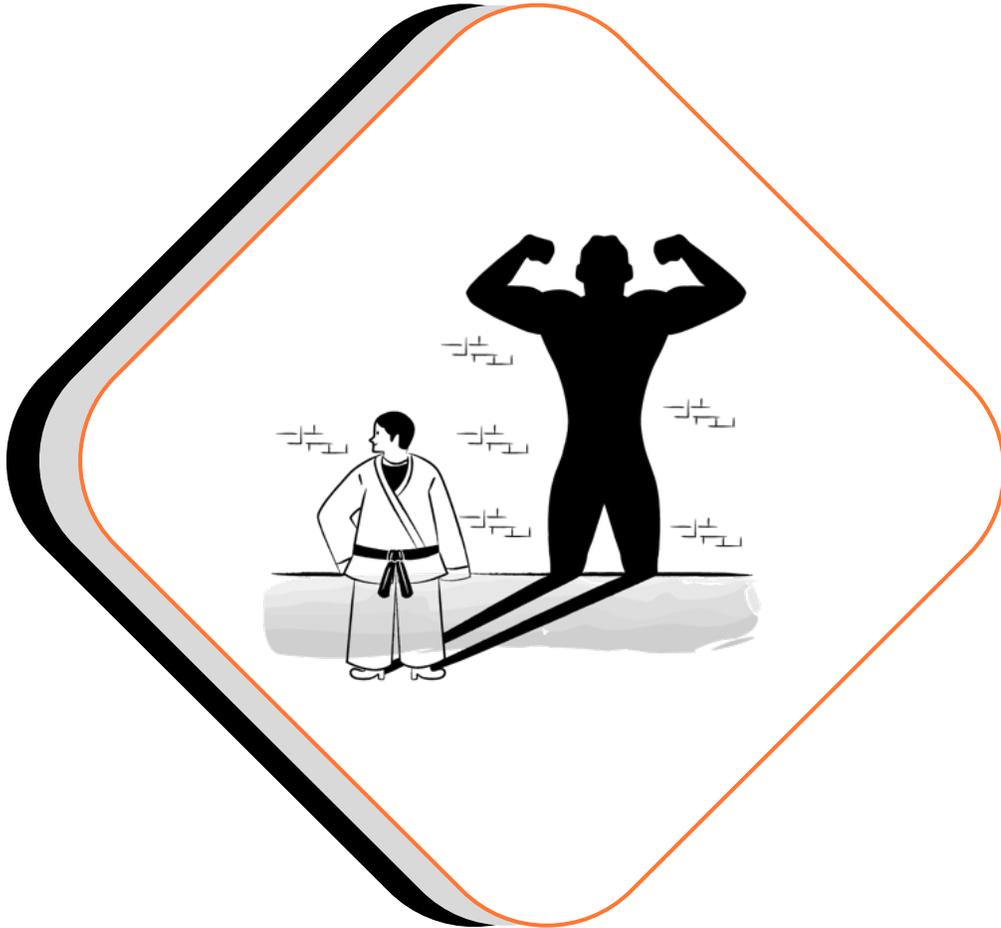
# COURAGE

is to keep going when everything in you wants to turn and run.

Fear is a reaction.

Courage is a decision and a practice.

# Courage



## What It Is

---

Courage is a decision rather than a reaction. This behavior is a reminder that no innovation can thrive unless we have the courage to say and do what is against the conventional wisdom and take a stand for what we believe is important.

## When To Use It

---

Courage is required at every step of the innovation process. From defining the problem to ideating new possibilities to designing and conducting experiments where the outcome is uncertain. Courage is required at every step of the process.



# How to Practice Courage

Courage can look different for every person. There are many different ways for courage to be expressed in the work environment and within your teams. Here are a few:



- **Suspend Negativity:** People are prone to put more weight to negative outcomes over positive outcomes. Recognize this and put as much effort into considering positive outcomes as you do for negative outcomes.
- **Create Scenarios:** Imagine the worst outcome from a given action and the outcome if you did not act. Identifying risks in advance can build immunity to your fears.
- **Build the Habit:** The best way to think of courage is to treat it as a muscle. While not everyone is created equal, we all have the ability to improve through training and practice. Try to speak up when you believe something is not right in your everyday and/or challenge yourself to take a stand when it matters.
- **Support Network:** Identify internal partners to consult with. Sometimes additional perspectives can embolden you to make the right choices.

