ALIGNING INNOVATION TEAMS

HOW FEI CONSULTANTS PROVIDE THE ESSENTIAL GLUE

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INTRODUCTION

Cross-functional teams are essential to product and service innovation. Any time there are people involved, the “Fuzzy Front End” will remain fuzzy. One of our clients calls this place, “a simmering pot of ideas, opportunities, opinions, politics, and fear.”

A significant amount of literature exists on what it takes to build a culture of innovation and to keep the team aligned on overall goals and objectives. Little is written about what needs to be done specifically during research studies and concept generation to enhance team cohesion. From our perspective, the customer’s voice is the glue. His or her voice is the most important one in the room, and it’s our job to ensure the customer remains heard throughout the process.

In the front-end of innovation (FEI), significant dollars are usually spent on understanding customer needs and “filling the funnel” with product concepts. The client team is under immense pressure to make the best use of these resources. Maintaining team alignment, effectively communicating the insights and opportunities, and building team confidence are all vital functions of the insights consultant.

Over the past decade, we have identified several best practices to help align innovation teams during an innovation assignment. There are many moving pieces, and careful consideration is required of the people and the process.

SCOPE THE PROJECT PROPERLY

When discussing potential FEI projects with clients, the conversation often starts with learning objectives. While important, they are not the most critical things to know before embarking on an expensive assignment.

First and foremost, the Insights consultant needs to understand the business imperatives. For example:

- What is the overall strategic mandate, and how does this project fit?
- Into which innovation platform does this potential project fall?
- What is the genesis of the platform, and why is it a priority?

If we have an understanding of the big picture, and what is important to senior management, we will be better able to manage team alignment. As it relates to establishing overall learning objectives, we rely heavily on the Integrated Product Definition (IPD) from Stage-Gate® International.[1]

When scoping projects, we find it helpful to determine where the project teams lack clarity or are misaligned on each element of the IPD.

We keep the IPD framework visible throughout the assignment and schedule regular client checkpoints to ensure that we are indeed closing the gaps. With large project teams, “scope creep” is always a risk. The usage of a framework like the IPD mitigates this risk.

In addition to project parameters, there are two other essential components to establish while scoping a FEI initiative that ensures everyone stays “on the same page:” success criteria and evaluation criteria.

The cost of a large-scale FEI project can easily run well into the six-figure range. How will success be measured? How will the team articulate a return on investment to senior management, especially when the output is concepts?

We think the insights consultant should be held accountable for delivering a specific number of well-developed product concepts. If ten is the goal, we know what needs to be done to get there.

Further, as ideas and concepts emerge, against what criteria will they be evaluated? These assignments can generate hundreds of ideas. How will the team separate the “wheat from the chaff,” so to speak? It is essential that the entire team be aligned on these criteria and that they “buy into them” at the time the project is being scoped. If they are not, there is a high probability that the team will not reach consensus on which concepts to advance in the pipeline.

Some teams can establish project parameters, success criteria, and evaluation criteria with little effort. It is common, however, that some teams need a formal process to cross this important hurdle. That’s where a Scoping Workshop is warranted.

1 According to Stage-Gate® International, the Basic 8 Framework of the IPD consists of the customer problem, customer needs, solution concept, product uses, benefits/value, target market, positioning, and technical solution.

The workshop actually starts with one-on-one interviews with each team member. This ensures the perspective of each team member is heard. In these interviews, we listen for an understanding of the strategic mandate, business imperatives, priorities, clarity/conflict around the IPD, and overall learning objectives. Results are compiled, and we point out areas of agreement and disagreement.

From there, an in-person meeting is typically recommended. The starting point is a review of what was learned during the interviews. Team discussion and problem solving are then facilitated to drive consensus on the project parameters, success criteria, and evaluation criteria.

The workshop usually takes 2-4 hours and is an excellent use of time. It ensures that everyone is on the same page and builds excitement and momentum toward next steps. The workshop is also a great way to assess the team's readiness for a significant FEI initiative. If after the workshop, there is still significant misalignment or trepidation, the "plug can be pulled" before significant dollars are spent on focus groups, ethnography, surveys, and more.

NEVER REMOVE THE GUIDEPOSTS

An aggressively-timed FEI project usually takes 8 weeks from start to finish, and it is like stepping on a moving train. Once the project is scoped, there is generally a whirlwind of qualitative research to ascertain customer needs: ethnographies, focus groups, and interviews. This can involve visiting multiple markets, oftentimes back-to-back.

Things easily start to blur.

After validating needs, the timeline advances to ideation and co-creation. After ideation, teams can get overwhelmed with the volume of ideas generated.

When working with large client teams, the players change from one phase to the next. This often adds to the volatility. We've been involved in projects where a new team of people was thrown in midway that had little knowledge of the project scope or understanding of customer needs, requiring a delay in team ideation until everyone got "up to speed."

Because of all the moving pieces, it is critical to keep the constants visible throughout every step of the FEI assignment. The Scoping phase yields three constants: project parameters, success criteria, and evaluation criteria. Once established, the customer's needs become the essential glue.

If the team does not "buy into" customer needs or hasn't internalized them, then team cohesion will erode once they move into ideation and concept refinement. There are some simple things to keep the team focused on the overall project charter and customer needs. The first is to create a laminated sheet or pocket card with that information printed on it, and give one to every member of the team. When new members come onto the team, they get a card. Because customers participating in ideation or co-creation need to know this information in advance, they too get a card. Also, each time a meeting is held, a wall poster is visible with the same information.

Visible and constant guideposts throughout the assignment are very important to keep innovation teams aligned. This is especially important during concept generation and concept refinement where the sheer volume of ideas can be overwhelming. A mechanism has to be in place to govern the development of this information, so create a "parking lot" for extraneous concepts. When evaluating ideas, if one falls outside of project parameters or cannot be linked back to a customer need, then it goes into the parking lot.

MAKE IT REAL

FEI assignments involve actively listening to the feedback and ideas of your customers and ensuring the client team has internalized them. Creating ways for the client to immerse with the customer is the best way to internalize needs and to build team cohesion around solving them.

Somewhere along the way, someone in our industry issued a commandment that stated, "during focus groups thou must always observe customers through a glass." Really? Why? The argument I heard was that the presence of the client in the room could bias the participants. I've never experienced this, and oftentimes the most constructive feedback our clients get is when they (with the help of a facilitator) communicate directly with customers. There is no better way to align a team than to throw them into the middle of a customer feedback session.

Immersion also applies to ethnography. By definition, ethnography is a combination of observation, interviews, and participation. The typical approach is to follow someone around, ask questions, and videotape them "in the moment." The best ethnographies occur when the project team can participate alongside the customer. It's not feasible in all situations, but if the opportunity arises...do it.

Perhaps the most successful ethnography I have witnessed was when the insights consultant and members of the client team worked side-by-side with hotel housekeeping staff. The amount of learning on unmet needs was unprecedented. During ideation and concept refinement, it was much easier to understand how ideas could make the housekeeping job more efficient and less strenuous because several members of the project team actually cleaned rooms for a few days.

Granted, it is not feasible to immerse every member of the project team in the manners described above. When the number of customer / client interactions will be limited, our suggestion is to immerse the right people.

A great tactic is to immerse a person (or two) who will become the "Needs Champion" for the entire project team. Their job is to make sure that customer needs stay front and center at every team meeting. We've even created life-size cutouts of consumer personas (organized around needs and value drivers) and given them an actual seat "at the table."

RAPID IDEATION CASE STUDY

Once of our best ideation experiences occurred when we employed back-to-back customer and client ideation. Customer needs had been previously established and internalized by the team.

On Day 1, ideation was conducted with customers. The 30-member client team observed this ideation workshop from an adjacent room. On Day 2, ideation was conducted with the client team.

During customer ideation, the client team was instructed to listen and journal ideas as they heard them. After the customer ideation was completed, the team discussed the preliminary ideas that emerged.

Client ideation started promptly at 9am on Day 2. The morning started with a review of the ideas captured from the previous evening along with insights from the facilitator.

We then moved immediately into team ideation. Over the course of six hours, this large team generated more than 50 preliminary concepts and roughly 300 new headline ideas on how to leverage their core technologies with a new target customer.

The human brain is an amazing processor and continues to problem solve during sleep. The Day 1 activity with customers was an excellent priming exercise for the Day 2 client ideation.

This rapid pacing of customer and client ideation significantly boosted the overall productivity of the client team. There was significant momentum from one step to the next with little opportunity for team division.

In short, wherever you can make the customer part of the team, do it. It has a profound impact on building and maintaining client team alignment.

When discussing issues, it's common for team members to ask "what would Sally (fictitious consumer) want?" It may seem a little corny to some, but it works.

As mentioned before, it is imperative that the entire team is fully aligned on customer needs prior to any ideation or concept refinement. In lieu of a PowerPoint presentation, organize a Persona Workshop. The goal is to hear what was learned during the research and internalize it. The outcome is a set of customer personas designed by the team that are organized around customer needs and value drivers. Because the team designed them, there is generally significant buy-in.

During ideation and concept refinement, there are unique ways to blend the customer and client team. Having that customer "in the room" can be a tremendous equalizer, and keeps the team focused on who (and what) really matters. When doing qualitative research, we always keep our eyes open for the "super participant"—someone that can clearly articulate needs, has good ideas, and seems thoroughly engaged in the process. When feasible, that participant is invited to participate in ideation and concept building. In effect, he or she is the "customer representative" for the innovation team.

PACE YOURSELF, SMARTLY

During an innovation assignment, some calculated pacing between specific phases can help maintain momentum and team cohesion.

Most innovation projects follow a similar path: project scoping, understanding/validating customer needs, ideation, and concept building and refinement. As it relates to pacing, there are specific recommendations during and between phases.

Scoping requires careful planning, and should be done slowly and deliberately to ensure everyone is on the same page. This step may take several meetings, a formal workshop, or other tactics, and is the most important step in maintaining team cohesion throughout an innovation assignment.

The phase dedicated to determining customer needs typically takes the most time and usually involves qualitative research to hear and understand those needs. Quantitative research is used to validate their prevalence and priority among the target customer. Once the studies are completed, time is needed for the full team to digest and internalize the learning.

Once customer needs have been internalized, it is critical to move quickly to ideation. If too much time passes, there is a decay effect and teams start second guessing themselves. Take advantage of the momentum coming out of qualitative and quantitative research. You'll be amazed at the results.

After ideation, attention turns to organizing and synthesizing raw ideas. Take your time with this. Get feedback from everyone on the team. Before you go into concept building and refinement, poll your team on the winning "idea buckets" using the same set of evaluation criteria established at the very beginning. Try to establish some priorities on where you want to focus the team's efforts moving forward.

The most effective concept building and refinement process is one that is designed to force the team to make tradeoffs and collectively agree on which concepts will advance. During refinement workshops, we recommend an iterative process where "idea buckets" or preliminary concepts are flushed out by small groups, and then presented to a larger group for feedback. This results in the entire team having contributed to the development of all concepts. After several iterations, consensus voting is conducted to determine which concepts will advance.

If actual customers are involved in this process, they always get "veto power." This prevents good ideas (from the customer's perspective) from dropping off if it fails to win the popular vote.

Once the concept building and refinement process is completed, we recommend rapid development of the final concepts. Staffing an illustrator or designer in this phase can accelerate this process.

When the final concepts are finished, hold a team meeting to get their blessing and submit them to quantitative testing as quickly as possible. Again, too much stalling (unless there is a really good reason) will erode team cohesion and momentum.

USE THE BRAINS IN THE ROOM

When working with large client teams, you often wind up with very diverse personalities and skill sets. Not to be too stereotypical, but think about the people in marketing vs. research and development. A lot of naturally creative people are drawn to the marketing field. Those with strong problem solving skills often find their way to research and development. Each, however, makes a unique contribution to the innovation function.

An innovation assignment requires a very diverse talent pool, and its overall success depends on the right combination of people and process. Team alignment can be compromised when the wrong people are called upon at the wrong step in the process, and when the process does not account for the differences in people.

Earlier I mentioned an important role of the “Needs Champion.” Did you know there is a personality type hard-wired to sense and internalize customer needs? It’s true. In Myers-Briggs® testing, that person would be labeled an “S-F”, which stands for Sensing/Feeling and is the middle two letters of the four-letter score from the test. We typically refer to them as Storytellers.

Another style, the Implementer, is process-driven and the perfect choice to be the person keeping the internal team corralled and on task.

During ideation, we want to make sure each small group has at least one Creative and one Problem Solver. These two styles excel at generating original ideas, and their presence will help those in the group who find brainstorming more difficult. During concept building and refinement, Problem Solvers are at their best. This process requires a lot of small group work and, when possible, you want the Problem Solver to lead the break out session. He or she is excellent at synthesizing ideas and will help bring others along.

At the beginning of an innovation assignment, we recommend testing your project team for their cognitive styles. This gives the project owner and consultants insight on how best to leverage each team member throughout the process. We always make sure that each person knows his or her style and that the full team understands how the styles work best together. When team assignments are based on leveraging unique gifts and abilities vs. things like tenure and position, it goes a long way in building team cohesion.

Styles testing also encourage self-reflection. When you make someone aware of their natural impulses, they are more likely to keep those in check. The Implementer, for example, can find ideation frustrating because at times it seems like a lot of spaghetti being thrown at the wall. It is supposed to feel that way. If the Implementer knows why they feel the way they do, they are more likely to “let it go” than disrupt the flow.

The best workshops and team meetings are designed to accommodate and maximize every style in the room. Activities can be designed that activate the left and right sides of the brain and tap into the potential of each style. If everyone feels connected to the process and that it accommodates their individual needs, this too helps to boost team cohesion.

Building and/or maintaining team cohesion is an important aspect of an innovation assignment. Keeping a team focused on customer needs is, without question, the best glue. Take the time to properly scope the project. Establish clear guideposts and make sure everyone knows the boundaries from the beginning. Keep these guideposts visible throughout the assignment. And, always look for opportunities to maximize the engagement and productivity of the client team and customer. Everyone has unique gifts and abilities, and careful consideration is required to ensure that these gifts are being maximized to their fullest extent.

ABOUT KIP CREEL & STANDPOINT

Kip Creel is the President and Founder of StandPoint, an Atlanta-based agency specializing in the front-end-of-innovation including insights, ideation, content building and concept evaluation. Over the past 15 years, StandPoint has generated impactful insights for many notable Fortune 5000 companies in healthcare technologies, pharmaceuticals, medical supplies, medical devices, and consumer packaged goods.

Kip developed SCORE™, an award-winning VOC process used by many companies in their front-end-of-innovation activities. In 2012, StandPoint was named a runner-up for the EXPLOR award, recognizing innovations in market research. Later that same year, StandPoint was named a finalist for Atlanta Marketer of the Year based on its unique VOC methods. In 2014, StandPoint won the Atlanta Marketer of the Year award for Innovation in Marketing Research.

Kip is also on the faculty of Stage-Gate® International, leading training seminars on using customer and consumer insights in the front end of innovation. Additionally, he teaches marketing management for the Executive Academy for Growth and Leadership, a continuing education program through Texas A&M University. Learn more about what Kip & his team can do for your innovation projects at: ***standpointgroup.com***