

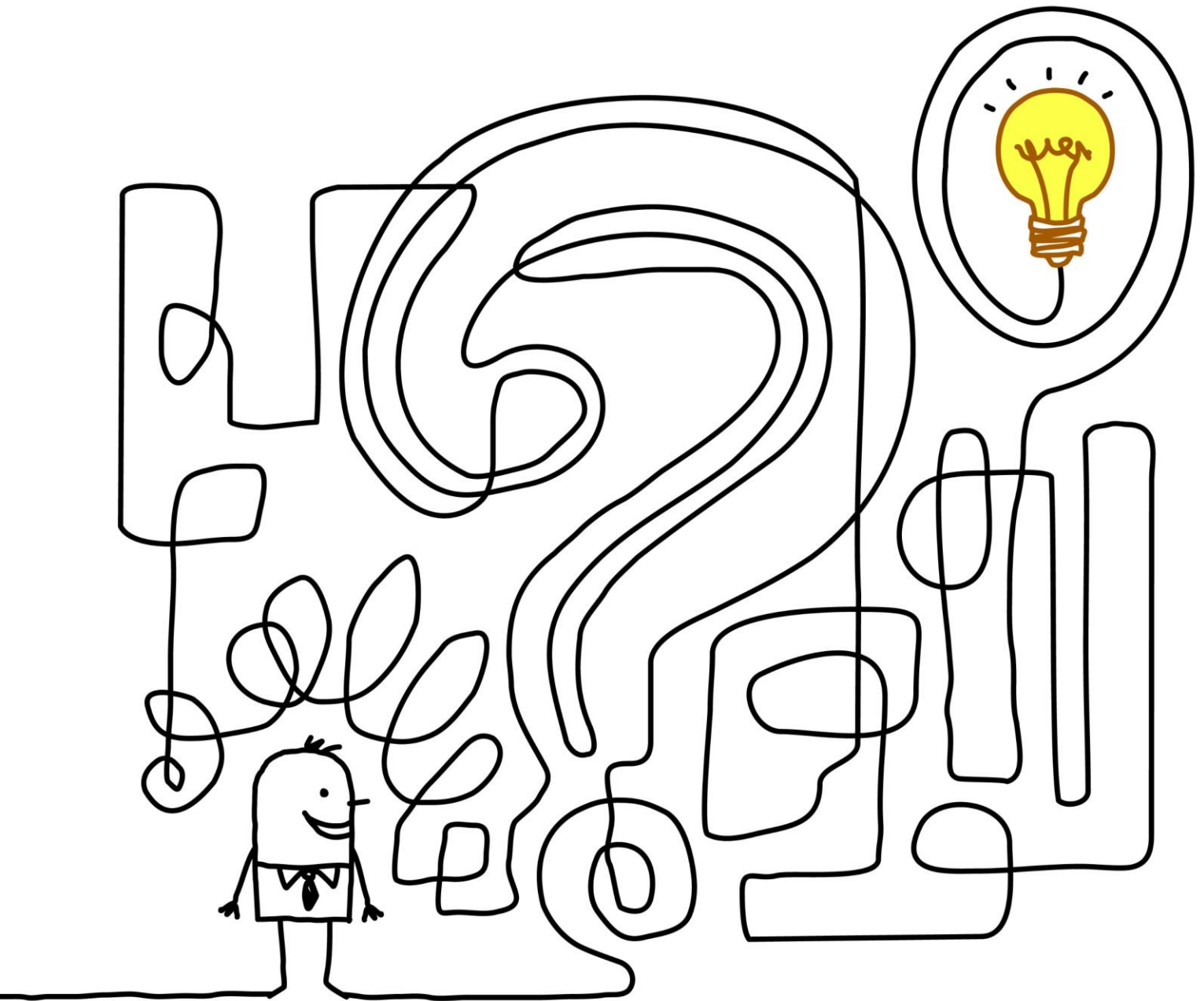


Get Smart

White Paper

Ideation

Do it Right Or Not at All





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Achieving breakthrough innovation relies on translating discerning insights into opportunities for new ideas and products. This challenge demands that those who participate utilize their individual perceptions, share them effectively, and shape them into ideas for new-to-world solutions. Ideation is intended to help in this process; however, not all ideation sessions truly accomplish these goals.

Ideation can be highly effective at generating novel solutions, but success depends on the right process and the right people. For many of us, our experience with ideation involves a large gathering of people and lots of sticky notes.

Unfortunately, it can also include a small number of people dominating the discussion, plenty of posturing, and some people feeling excluded or underutilized. The list of potential dysfunctions is long. As such, the general opinion among many colleagues is that past sessions have been disappointing. Some firms have given up on ideation completely because past experiences were considered a waste of time. We agree: if best practices cannot be followed it is better to avoid it altogether.

There is a right way to do idea generation. Decades of research have uncovered strategies for enabling organizational creativity and maximizing the outcome of brainstorming. In the past five years especially, significant advances have been made in brain science. We now understand far more about how people receive and process information, and what drives engagement. Both are critical success factors for idea generation. Our [Quartet](#) Ideation framework uses the science of innovation archetypes to maximize the engagement of ideation participants.





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BEST PRACTICES

Many clients ask us to describe “Best Practices” for ideation. In general, the success of your ideation depends on the following factors:

1. **Establish a precise problem statement, objectives, or opportunity areas.** This is critical, and it’s one of the areas often overlooked. A common criticism of brainstorming is the lack of clarity on the overarching purpose, which leads to unactionable results. We are often asked where and where not to involve senior leadership. Getting their alignment on the objectives is the obvious answer as they are often the people who can marshal resources for necessary change.
2. **Determine evaluation criteria.** Down the line, ideas and solutions will need to be evaluated and prioritized. Having agreed-upon criteria to accomplish this will ensure a more efficient process. What exactly does the idea need to enable: more sales, speed, greater accuracy, cost savings, reduced risk, etc.? Again, we advocate including executive input here, since the criteria are often linked to resource allocation.
3. **Select the ideation team.** As it relates to participants, there are many, many considerations:
 - It’s important to include the right voices for the assignment. Some potential questions: do you need subject matter experts? Should you include people who have little knowledge to get a fresh perspective? Do you need representation across functional areas? Who is closest to the problem you are trying to solve? Do you need to populate the team with people you know to be highly creative or strong problem solvers? Answers to these questions largely depend on the assignment objectives.





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- The ideal team size is 15-20 people. This group size allows for the creation of small working groups and some independence to work alone. If the group is too large, it is unwieldy and will lose focus. If it is too small, it will not allow for enough divergent opinions.
 - We do not recommend including both managers and their direct reports on the team. We also recommend avoiding including those who are Senior Director or higher level in the organization. We all know the reason for this. People in leadership positions have considerable influence over groups. Their preferences can significantly impact the generation of novel ideas.
4. **Prime the ideation team.** A key shortcoming of traditional ideation is that participants arrive at an ideation session without sufficient context and knowledge to contribute effectively. To remedy this situation, we typically engage participants in advance of the ideation session, “priming the pump” by sharing background information and “starter ideas” that may have emerged from prior activities. When such information and objectives are shared in advance, participants’ brains will naturally begin to process them, and participants arrive ready to engage. Best practices for priming include the following:
- Present the problem statement, objectives, or opportunity areas, encourage discussion, and gather ideas. Be open to the possibility that your original problem statement may require modification.
 - Provide your ideation team with the necessary background information that is driving the need for novel solutions. In our agency, we often present market research findings, voice of the customer research, or other consumer, customer, and end-user data that helps to frame up the problem, objectives, or opportunities. This priming meeting should occur 2-3 days prior to the scheduled ideation. If conducted too soon, participant engagement will decay over time. If conducted too late, people will not have enough time to process prior to the event.



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- It is acceptable to involve senior leadership here if they can help frame the problem or situation. But it is essential that they refrain from advocating for specific solutions.
 - Work toward a finalized problem statement. Ideally this will be completed during priming, but it may require additional communication to get this nailed down.
5. **Encourage reflection.** During the 2-3 day period between the priming session and ideation event, team members should reflect and journal ideas to bring to the meeting.
6. **Conduct the ideation.**
- The ideal format is 4-6 hours each day over a two-day period. Maintaining energy levels for longer than 6 hours is tough to do. A 4-6 hour time commitment also gives people time to handle urgent emails and calls and minimize distractions during the ideation event. Ideating over two consecutive days also has benefits—primarily that participants have an opportunity to think and reflect on ideas presented in Day 1.
 - It's important to include a variety of activities in ideation to activate both divergent and convergent thinking processes. Our brains are most activated when we share or teach others what we know. To capitalize on this, most listening and writing activities should be accompanied by both paired sharing and group processing activities.
 - If possible, it is a good practice to profile participants based on their innovation archetype and to include activities that play to the strengths of each participant. Based on principles of brain science, [innovation archetypes](#) can help participants understand their strengths and weaknesses, increasing engagement and maximizing the success of ideation.





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- Other tips for a successful ideation event include:
 - > Encourage movement to keep energy levels high.
 - > Keep the problem, objectives, or opportunities constant and reference them frequently.
 - > Avoid converging or organizing ideas until everyone's ideas are heard.
 - > Encourage drawing, diagramming, and writing to activate different types of thinking.
 - > Avoid evaluating ideas until the very end.
 - > Re-invite senior directors and higher to hear idea pitches (e.g. Shark Tank).

7. Keep communicating after ideation.

- Keep the lines of communication open because additional ideas will emerge.
- Encourage impromptu meetings to hash out ideas further.
- Purposefully reach out to each ideation team member to collect more ideas and get personal reflections.
- After a solution is adopted, make sure each person is aware of the solution, and the specific rationale.

Ideation can seem like a messy process. It's a creative exercise after all. But by setting smart guardrails, involving the right people, and following best practices, you can ensure it's a productive process, too.





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- Does your organization need a responsive helping hand when conducting do-it-yourself research? Our consultants are available to assist with problem definition, project scoping, reviewing discussion guides, reviewing questionnaires, interview coaching, and more. This is the best way to offer your team the training and support they need to elevate customer understanding across the organization. Blocks of time can be booked according to your needs. [Contact us](#) for more details.
- Check out our [event schedule](#) for upcoming workshops.



You can [Kickstart](#) the innovation process with a workshop focused on your own specific goals. It is an excellent way to align the cross-functional team, enhance skills, roll up internal ideas, and identify gaps in your knowledge.