Guided Ideation:
A Management Approach to Creativity-Based Performance

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Executive Summary

> *"I start with an idea and then it turns into something else."*
> – Pablo Picasso

In business as in art, ideas are the backbone of innovation. The importance of creativity and new ideas is widely recognized, and formalized ideation is the accepted front end to the innovation process. A certain amount of management is required to turn good ideas into good business. But human elements also play a key role in this process, manifest in such areas as serendipitous discovery, cognitive and social interaction between people, personal motivation, and emotional engagement. These indicate the need for a somewhat less traditional management approach.

Guided ideation can offer solutions to many of the common hurdles to creativity and new ideas in business. This paper will review some of those challenges, and propose best-practice building blocks for creating a successful guided ideation process.

Ideation, Idea Management and Guided Ideation

Pablo Picasso, co-inventor of cubism, once described his way of working as "I start with an idea and then it turns into something else." This is a good description of the creative process, and not only as it relates to art. On a high level it also applies to new product and service innovation in the business enterprise, pointing to the need for inspiration, search and exploration.

The importance of creativity and new ideas in business is of course widely recognized. Today *ideation* has established itself as a front-end extension to the well known Stage-Gate® process for product innovation. In this context, ideation loosely refers to the acquisition, creation and evolution of ideas in organizations. Following this notion, *idea management* might then be defined as the process and associated discipline of facilitating ideation from a management perspective. Even though the process concept can be applied to ideation, it must be recognized that innovation involves serendipitous discovery as well as significant human cognitive and social activity. To emphasize the thus somewhat less traditional management approach required, it may be more appropriate – at least in some respects – to refer to idea management as *guided ideation*.

The purpose of a guided ideation process is to increase the return on creativity in organizations in support of both innovation and problem solving. This may involve a number of key objectives and challenges such as stimulating creativity, generating and capturing ideas, engaging relevant expertise and evaluating new concepts.

The successful implementation of a guided ideation process should result in both organizational and business benefits:

- Adding structure, definition and visibility to the early stages of innovation;
- Providing ideation language and vocabulary;
- Adding consistency in creating, developing and evaluating new ideas;
- Increasing the level of innovation (more good ideas) and accelerating learning; and
- Increasing the return on innovation (good ideas turning into good business).

Ideation Challenge: Harnessing Creativity

Over time, R&D and engineering organizations develop strong expertise in technology and in product development processes. They also typically show a preference for analytical over creative thinking. Even though such expertise and skills are necessary in technological innovation, it does not automatically follow that experienced and competent organizations are also highly creative. However, creativity can be developed and creative thinking can be learned.

Creativity research suggests that *process* (ideation), *management* (guidance) and *intrinsic motivation* all play key roles in driving creativity and innovation in organizations.

Working on interesting technology is certainly a key intrinsic motivator in R&D organizations. It is, however, not the only one. Creativity is closely related to

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positive emotions and perceptions of progress. On the other hand, a strong focus on performance and efficiency – important as these may be – can be difficult to reconcile with a need for creativity and innovation.

Creativity, to be useful, requires convergent and divergent thinking. It also requires both individual thinking and thinking in teams. Even though creativity can be stimulated, it has some limitations. To some extent, technology and product areas determine creative potential. And creative ideas most often originate from what individuals are actually working on and, therefore, what they naturally think about. This implies that the driving context for ideation is constructed not only from the characteristics of technologies and products, but also from people's knowledge and perceptions of them, and from the innate creativity and curiosity of the human mind.

Ideas may emerge spontaneously or as a result of organized efforts. Regardless, they need to be captured. Ideas that remain tacit, as cognitive entities in the minds of people, can only be expressed by engaging people in idea collaboration, review and discussion. Ideas expressed in explicit form can, of course, be captured more easily and submitted to an idea repository, for example.

It is not only the initial *idea conception* that is important. The subsequent discussions, comments, reviews, enhancements and collaborations add perspectives and insights that may be necessary to move an idea forward and make it grow into a strong new product concept. Creating and maintaining a collaborative environment for *evolving ideas* is crucial to successful ideation. This also helps level the playing field so that ideas can compete on fair terms.

Overall, it is easy to see that the process of ideation is one that, while driven by purpose, needs to be guided rather than managed. If asked, most people would be willing to share their ideas with their employer and coworkers. This assumes that conditions are conducive to such contributions. Though typical in mature organizations, questions such as "Do we really have time for this?" or "What's the charge code?" can easily frustrate any initiative, innovative or not.

Not everyone can be expected to genuinely care about the organization for which they work (and vice versa). In R&D environments, this can be particularly noticeable as many professional engineers feel as strong an identification with their discipline as they do with their employer. In fact, the smartest and most creative individuals are often the first to disengage if they perceive things are not going the right way.

It may even be possible that some individuals feel it more advantageous to keep a great idea to themselves in case they are laid off or decide to quit. This attitude is obviously not desirable, but certainly understandable considering that even rejected ideas are in most cases still legally owned by the company and not by the employee.

Ideation Challenge: Time and "Space"

Another important ideation challenge is the often chronic condition of real or perceived lack of time. Deadlines and everyday distractions take away from the time necessary for people to make creative contributions. Ideas need time to "breathe" and people need time to "soak" in the problem, challenge or opportunity. This requires some form of organizational slack, or the active facilitation of opportunities

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for people to spend time thinking and connecting with others beyond the needs of their current assignment.

It should be noted that time is required for a range of ideation activities: creative thinking, making idea contributions, collaborating with others, participating in events, reviewing contributions and so forth.

Ideation Challenge: Visibility and Focus

Poor definition of problems, challenges and opportunities may also render ideation efforts ineffective. This requires special attention as the urge is often to move quickly towards solutions even if the problem or opportunity has not been well defined.

It should also be easy for people to make contributions without necessarily having to follow documented procedures or climb a steep learning curve associated with the use of a new tool.

During idea searches and reviews, people should preferably have access to all existing idea artifacts as well as to relevant market and technology research and competitive intelligence. It would therefore be beneficial to maintain an integrated tools environment or at least to provide easy access to different information environments.

Having made contributions, most people accept the fact that their ideas may be rejected, but they would like to know why. They would like to get feedback in a timely fashion and they would like to see that at least *some* ideas, even if they are not their own, are actually acted upon. It may be an advantage to establish an ideation point-of-contact in addition to referring individuals with ideas to an online ideation tool. Such a tool may be a good one, and may include ratings and comments by others, but it will always remain to some extent impersonal and unable to share the passion a person may feel about their ideas.

It is also important for people to be able to stay connected with their idea in the event that is adopted for further development. This in turn requires both some overall continuity of technology and projects and some organizational flexibility to allow people the freedom to follow their idea and participate in the effort of moving it to market.

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- *an open "submit-anything-anytime" environment*
- *integrated with the product or service development process*
- *topic-focused and time-limited: idea campaigns, events, competitions"*

Ideation Challenge: Organization

Not everyone can be expected to have ideas about everything. Ideation should focus on active solicitation of ideas from groups and individuals who are likely to have ideas about a particular problem or opportunity. In the product domain, this translates to people with sufficient technology expertise or application/user experience relating to the areas concerned.

There are basically three ways of organizing ideation:

- An open "submit-anything-anytime" environment;
- Integrated with the product or service development process; and
- Topic-focused and time-limited: idea campaigns, events, competitions.

The integrated approach is typically semi-mandatory with ideation activities predefined as part of the work process. It is not necessarily intended to change what's in a new product development project but rather to tap into people's minds as they work through it.

The first and the last of the above organizing schemes are most common, with the topic-focused and time-limited approach generally producing better results. While an open and asynchronous ideation process ("submit anything anytime") makes it convenient to contribute, it does not create compelling reasons to do so. An ideation process organized as a series of *idea campaigns* would most likely yield a better overall result.

Idea campaigns are organized innovation challenges that are relatively short in duration and focused on predetermined business opportunities or technology problems. It is feasible to launch two consecutive campaign sessions on the same topic to reach an appropriate number of people, thereby allowing the second session to build on the results of the first.

Well-articulated innovation challenges motivate creative thinking and facilitate collaborative ideation. As contributions cluster in the targeted area, evaluations may be performed in bulk by a single team of experts and managers, making the review cycle more efficient.

Idea campaigns are useful in that they serve as the "front end" of ideation, helping to communicate importance, raise urgency and focus the creative effort in time and on particular challenges. They also demonstrate management commitment and thus can make it easier for people to make time for contributing ideas. Most likely it will also be easier to find an internal sponsor willing to invest in ideas that result from campaigns organized and promoted by management.

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The ideation process can be greatly facilitated by designating organizational roles. This also demonstrates management support. Such roles could include *ideation champion*, *idea campaign manager* and *idea champion*. R*eview teams* can be designated in conjunction with the initiation of an idea campaign to secure the availability of time and expertise for idea evaluation.

Serious idea contributions may justify serious incentives. In cases where ideas develop into actual new products, such incentives might include cash rewards similar to those many organizations offer for patents. If an idea develops into a new business, the incentive might take the form of stock options.

Tangible incentives, however, should not be used to the exclusion of working with intrinsic motivation, as the latter has been shown to be strongly associated with creative contribution. The reverse should also be avoided.

Summary

In summary, the following should be part of any serious approach to guided ideation:

- Communicate and promote ideation to increase general awareness;
- Develop a management approach to organizational slack, intrinsic motivation and employee engagement from the perspective of ideation performance;
- Designate organizational roles: ideation champion(s)—not just an ideation tool champion, idea campaign manager(s), idea champion(s) and idea reviewer(s);
- Drive ideation through organized and engineered idea campaigns;
- Clearly define problems, challenges and desired outcomes;
- Segment and target potential contributors and actively solicit contributions through individual invitations to submit or review ideas from different perspectives;
- Communicate with idea contributors and provide timely feedback and updates;
- Offer real incentives for engagement;
- Conduct internal ideation workshop sessions to increase reach and stimulate contributions;
- Align the design and configuration of ideation tools with the main business purpose of ideation and with the focus of idea campaigns; and
- Make it easy to submit contributions and use an ideation tool not just to capture and share ideas, but also to promote ideation and manage idea campaigns.

Even with all of the above in place, confidence in the future has an inevitable impact on people's willingness to make voluntary contributions to the business. When people are not sure about the company future, or their own future with the company, even if they do not deliberately deny the company a great idea, creativity and innovation are simply not first and foremost on their minds. It may be tempting for management to communicate that individuals making idea contributions are particularly valuable to the business, but this could easily turn into a slippery slope. Better then for management to demonstrate strategic leadership, create a compelling but realistic vision for the future and, most importantly, provide real, tangible support for innovation.

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About the Author

Anders Hemre is the founder of Interknowledge Technologies and the former chief knowledge officer at Ericsson Canada. With an international background in the telecommunications industry, he now specializes in the organizational practice of innovation and knowledge management. He can be reached at ahemre@interknowledgetech.com.

About Sopheon

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