



ideanote.io

YOUR MODERN GUIDEBOOK TO



MANAGE IDEAS

MANAGE IDEAS

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INTRODUCTION

LOOK AROUND

It's time for innovation professionals at all levels and in all industries to face some hard truths about our profession:

Today, innovation and idea management is no longer a magic science mastered by a lucky few innovation gurus. Access to the tools of innovation is democratized and more accessible than ever before. Every company knows they need to innovate to survive on the global marketplace.

At the same time people are tired of buzzwords and ideas getting lost, and customers don't care about a company's self-aggrandizing 2030 vision.

To put it bluntly, **innovation is mainstream.**

So that's the end of this guide, right?

Not so fast.

The reality is that the expectations of the workforce and customers evolve. As CIOs, innovation managers, and project leaders, we need to evolve alongside them.

People want autonomy and purpose. They want down-to-earth results. They want transparent processes.

We need to develop a new way of doing things. We need to be more resourceful, more open, more playful, more simple and more engaging.

We need a modern approach to managing ideas.



That's exactly why we wrote this guidebook; to share best practices that we've collected over the years.

At Ideanote, we have been working to make idea management more simple, fun and engaging for everyone since 2015.

In this time, we have designed and built three iterations of our idea management platform and launched pilots ranging from 20 people to 200.000 people - from Beijing to Berlin.

In this guidebook, you'll find 35 actionable lessons that you can apply on your journey to master modern idea management for your company.

Regardless of what stage you are at with your innovation, these 35 *best practice* lessons will help you take your idea management game to the next level.

We hope you'll enjoy the read - and remember to have fun while making ideas matter.

- TEAM IDEANOTE





HOW TO

1. START

2. STRUCTURE

3. COLLECT

4. ENGAGE

5. MEASURE

6. SCALE



CHAPTER 1

START

LESSON #1

Play Around

Let's get this show on the road!

Really. Don't be afraid. Idea management platforms have come a long way since 1990. It's really just clicking around. It's all there. And if it isn't, a friendly helpchat is just one click away.

It worked for IKEA, it worked for Roche, it worked for New York University, and it'll work for you.

Once hundreds or thousands of people are involved, things get serious. But right now the stakes are low and it's all fun and games.

You've got an empty canvas and everything you need right there at your fingertips. Play around.

LESSON #2

Short and Sweet

Who is going to remember
cocreation-innovation-lab-east.ideanote.io?

Bite the bullet and think of a short name for your workspace. Keep it short and memorable. Like this lesson.

LESSON #3

Make it Yours

Your home for innovation deserves some love.

You want to feel ownership of the platform and make people you invite feel at home.

Add your brand colors. Choose a font. Add a logo.

This might not seem important but it is surprising how it's sometimes the little things, you know? For someone visiting the platform for the first time a little familiarity will go a long way.

LESSON #4

Make Innovation A Team Effort

Don't blindside important stakeholders. If we could share just one piece of solid advice, this would be it:

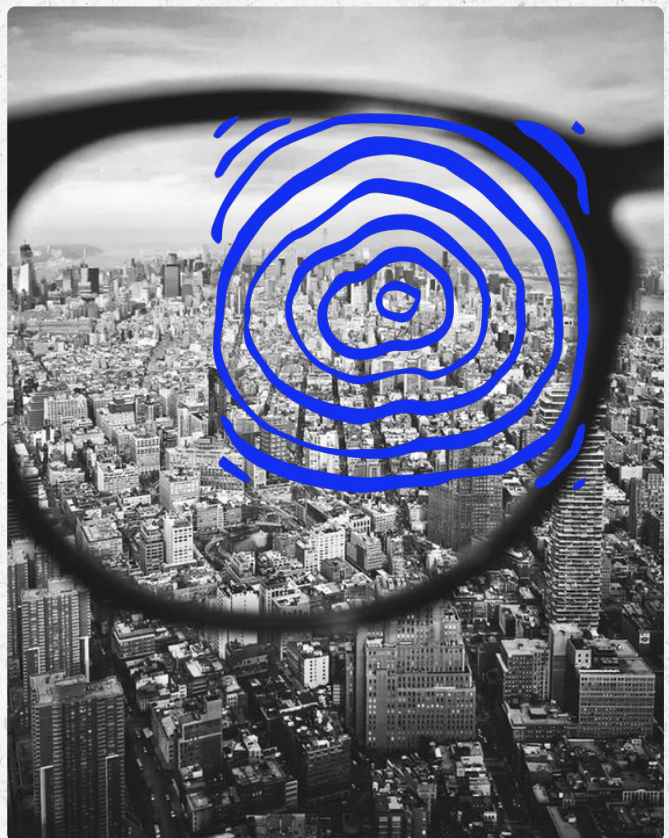
Get some of your people aboard today.

One of the best ways to do this - apart from meetings - is by inviting them to the platform as early as possible.

You don't have to invite everyone and their dog, but do **invite 2-8 relevant stakeholders you think might be useful on your shared journey.**

Let them know you're still in the early stages. Most people appreciate openness and who knows, you might uncover some hidden innovator geniuses in the organisation already.

In the end, you'll need them, and they'll need you.



LESSON #5

Honest Culture Check

Stop. A big part of idea management is asking for ideas, co-creating solutions and asking for constructive feedback. You need to be brutally honest: what is your current culture like?

If your company's employees are scared to speak their mind or your customers are in full-on rage, idea management alone won't solve your problems. Idea management works best in companies that have a culture of listening, a culture that wants to make ideas matter.

We've seen idea management go butter-smooth when the culture was already there, we've seen companies turn idea management down because they "don't believe employees are smart".

Luckily, more and more companies are moving away from top-down, cubicle, carrot and stick methods. Instead, workplaces are becoming more and more decentralized, collaborative and encourage bottom-up and cross department communication. If that is already your path, the future is yours. If it is not yet - welcome!

Idea management can be a first step toward that new reality.

LESSON #6

Get Some Leadership Involved

It's one of the most important early-stage to-do's for idea management. Idea management, if run successfully, can lead ideas to the finish line that make a difference for your customers, your revenue, and your products and service.

Still, in their heart of hearts your people know: if your leadership is not onboard, their ideas might never make it across the finish line.

Yes, you can run idea management in your department or team and never bother your leadership. But you'll plateau once an important idea is too big to fund, too risky to try, or suddenly involves too many stakeholders.

It makes a huge difference for people to know innovation is one of the top strategic goals and that management is onboard. In multiple cases, we've had C-Level management record short 1-minute videos where they rally people and ensure innovation as a priority.

Innovation, by nature, needs trust and a willingness to dare - and **people will only truly dare to innovate if their leaders do.**

BEST PRACTICE SPOTLIGHT

How long does it take? Are we moving fast? Timelines vary across our customer base and what is considered fast varies too. Most companies want to get started within three months.

In fact, some get started within a day - see lesson #1.

A word of caution on compliance. Depending on your company, getting through compliance can stretch an ambitious 30-day goal into several months. Suddenly it's January. Ouch.

Starting the process early and asynchronously can make a difference for meeting your own timeline goals.





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CHAPTER 2

STRUCTURE

LESSON #7

Mirror Existing Structure

Most idea management platforms offer a flexible structure that cater to a wide variety of possible setups. You could structure the platform in a thousand different ways - so where to start?

Our advice for 90% of companies is to mirror their existing business structure. Create team folders for every department. Business challenges are then created in a department and shared from there.

Mirroring the structure is a surefire way to be able to scale the structure across the entire company.

People understand it because they know it and you're never in doubt: where is that marketing challenge? It's in "Marketing". Easy.

LESSON #8

Start Small

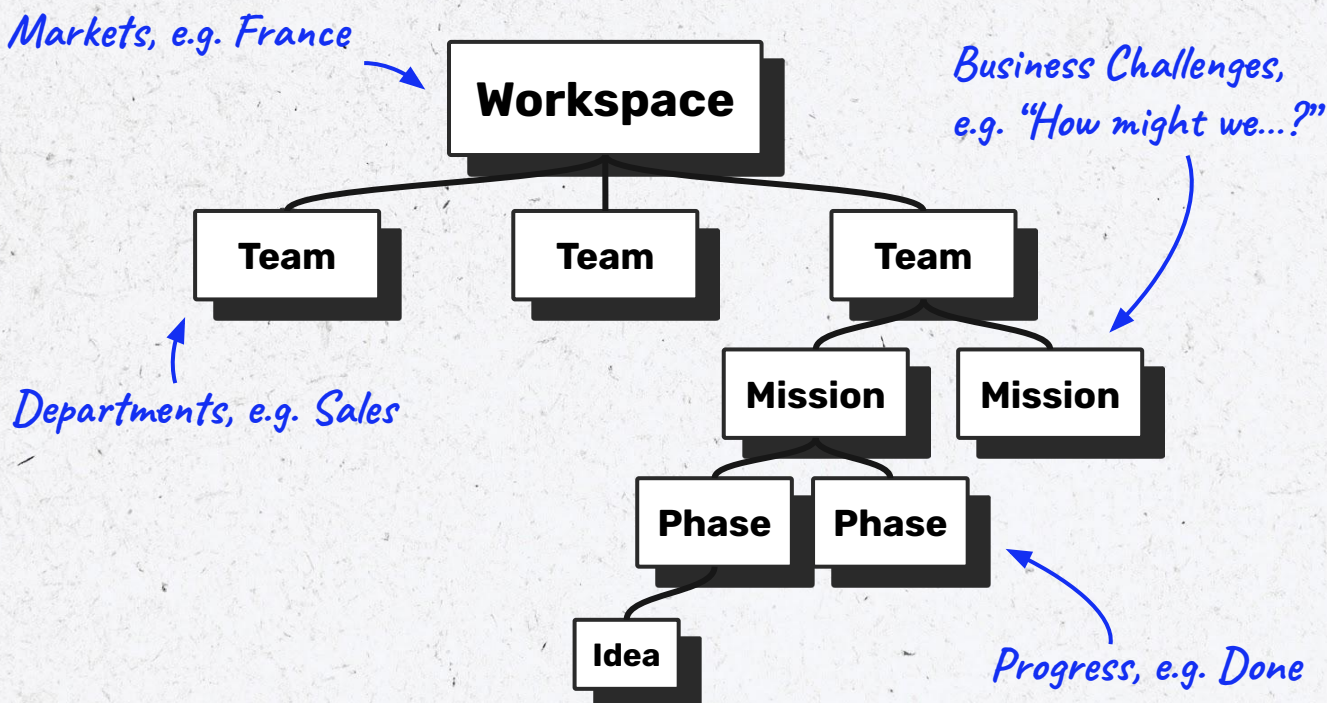
We love your ambition. We really do. However, if this is your first time introducing idea management into your organization, it's important not to rush things.

Instead, take your time and slowly find your legs by letting things grow organically one department at a time.

We recommend starting out in e.g. one team and then adding from there as you test, improve, and iterate to find your own unique style that fits both your innovation goals and your internal culture

Good innovation is like really good cheese: It takes patience. If you want the very best innovation, you must let it ripen slowly as you perfect it over time.

EXAMPLE IDEA MANAGEMENT SETUP



LESSON #9

Analyze Your Process

You might already have a process for working with ideas. People might be submitting ideas via email and you might have a council meeting about new ideas every month, where you discuss, evaluate and decide on ideas.

What happens after that? What happens before that? Why is that happening?

It's a good idea to map out the path of ideas in your organization in its current state.

Think about the reasons for the status quo. It might be purely technical - or **there might be important learnings in the ways you have been doing things.**

Once you've mapped your process you are better equipped to plan your idea collection.

LESSON #10

The Idea Management Rule of Three

If you're opening up the whole workspace and not just a single idea collection, you don't want people to meet an empty shelf.

We recommend quickly **running at least two specific and one catch-all idea collection at any given moment.**

A catch-all or "sandbox" idea collection makes sure people can submit ideas they had in mind when they entered the platform but that they could not find the right mission for.

One strategy is having a catch-all mission per department, for example "Other Marketing Ideas".

LESSON #11

Group People

Are you working with a group of evaluators that you often invite to idea collections? Create a team and make it easier for yourself to add them and track who has access to what.

LESSON #12

Master Role-Management

Your idea management platform has a role management system. That means you can make people admins, team owners, and possibly things in between.

Use these powers wisely to nominate people that can help you out when you're on holiday or even take over responsibilities side-by-side.

LESSON #130

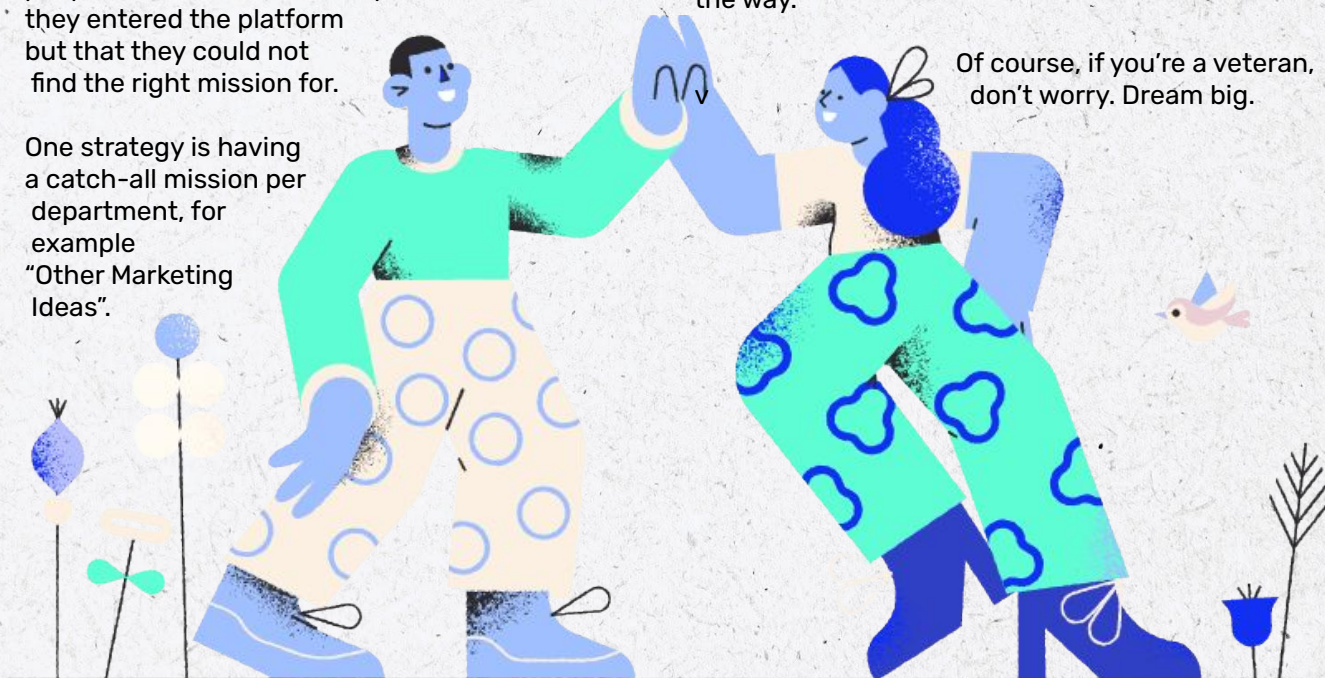
Pick A Path

Starting out, you'll have to make a tough decision. Where do you want to start? Do you want to launch a one-off idea collection campaign? Do you want to go for continuous idea collection right off the bat? Do you want to collect ideas internally or launch open innovation?

If you are new to idea management, you can start with a single limited-size internal innovation idea collection.

It's best if at least a part of your organization has made it part of their DNA before you push it out all the way.

Of course, if you're a veteran, don't worry. Dream big.





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COLLECT

LESSON #14

Pose Focused, Open-Ended Questions

We're big fans of something called the How Might We (HMW) method, and I'm willing to bet you will be, too.

The HMW method helps you brainstorm new opportunities using the power of language.

Here's an example: Imagine you're in the waffle business, Valentine's Day is just around the corner, and you and your team want to explore new business ideas!

Instead of simply asking *"Can we come up with something for Valentine's Day?"*, you might ask one of the following How Might We questions to get your team thinking differently and come up with new, valuable ideas:

- How might we reshape our waffles to convey different emotions?
- How might we create the perfect waffle to share?
- How might we disrupt the status quo of today's waffle toppings?

Make sure your How Might We questions aren't too narrow or too broad.

They should provide your team with focus, yet leave enough room to explore even the boldest of ideas

Posing too narrow a question might mean you're pre-defining the solution. For example "How might we deliver waffles via drones?"

You'll not inspire people to submit ideas, you'll get fewer ideas, and most of them are going to say "We could deliver waffles via drones".

Posing too broad a question might leave your people wondering what exactly you are looking for. For example "How might we earn more money?".

In this case, where the question is too broad, everything from *renting out elephants* to *firing everyone* are viable ideas. We don't want that.

It's all about striking a balance. **Ask a question that inspires solutions that will be useful to your organization.**



LESSON #15

Help People With A Minimal Idea Template

Remember, you're asking people to come up with ideas for a problem you've defined. Everyone wants to do their very best to submit an idea that is helpful - an idea template can help with that.

An idea template is like the empty skeleton that people fill their idea onto. It can inspire and provide context when needed.

By defining idea fields with helpful contextual clues, you're basically side-coaching people, helping them submit ideas in a format that have a better chance at being chosen as a winner.

From your perspective, depending on how broad your audience and question is, you might want to add qualifiers like a checkmark field asking "Which area is this idea impacting?". That can save a lot of time when managing ideas later in the process.

Remember: people love submitting ideas but they hate wasting time. **Only ask the questions you absolutely need to ask.**

LESSON #16

Be Transparent

It's best practice to be as transparent as possible about the process to both stakeholders and your audience right up front:

First off, to be honest themselves, people expect a transparent process. They are less likely to share their ideas if they don't know what's going to happen.

Secondly, you should manage stakeholder expectations. If stakeholders expect 50 executed projects after 30 days, but instead it takes you 90 days to produce a shortlist of viable ideas, you will meet a lot of disappointed faces. Therefore, agree on the goals.

Last, but not least, if idea submitters know what is going to happen, they feel they are part of something bigger and won't be disappointed if their idea is not chosen - out of possibly thousands.

No-one expects a golden egg, and in general, people know innovation can be unpredictable. But be aware that you bear a responsibility in communicating clearly. Be transparent.

LESSON #17

Be Where Your People Are

How and where should you collect ideas? Our best advice is as much as possible to get out there in front of people.

- Do you have a lot of front-line factory workers with limited device access? Set up a kiosk solution or integrate with SMS idea submission.
- Do your people frequently use the intranet? Integrate with the intranet as a way to launch new missions and a fast solution to submit ideas right then and there.
- Do you only have a list of emails? How about just generating a shareable link and adding that to your outreach emails. One click and they are in.
- Do you run physical stores? Add posters with a short link to one of your missions.
- Do you run open innovation with customers? Expand your idea collection to all website visitors with an embeddable widget.

It's simple math. People love to come up with ideas - but only if they know it's an option.

We've had customers put up posters in every toilet stall at the corporate office. Yes, it's unorthodox - but it worked wonders for awareness.

Don't be shy. Be where your people are.

LESSON #18

Remove Friction With Single-Sign On

Your company has ways to let people sign-in to your existing infrastructure. Connect this identity provider with your idea management platform to make sure it's safe and secure.

Even more importantly, it's easier. Who wants to remember another password.

Ask an IT representative to find out what sign-in people are using in your company. Most standard sign-in solutions are easy to connect nowadays.

Here's what to ask: What type of SSO, SAML or AD are we using in our company? Just send that info over to your idea management platform provider.



IDEA COLLECTION CHECKLIST

1. Purpose

Every idea collection starts with a strong purpose that people can rally behind.

Questions: Why now?
Why this challenge? What
company values,
strategies and challenges
does it tie back to?

2. Question

Define your focused
“How might we..?”
question. Keep it
positive and focused.

Examples: How might we reduce emissions during production? How might we turn our product line into services?

3. Goals

What are your goals and how will your people know you've reached them.

Examples: Number of engaged people, collected ideas, countries involved, implemented ideas, or dollars saved.

4. Audience

Define a relevant audience and decide how open the challenge is.

Questions: Who is invited to submit ideas? Should people be able to comment? Who will understand the question?

5. Team

Settle responsibilities.

Questions: Who helps define the question? Who takes care of technical aspects? Who will help evaluate the questions? Who takes the best ideas further and how?

6. Timeline

Plan out activities on your timeline and distribute tasks.

Examples: Mission Setup, Communication Plan, Test Run, Launch, Mid-Way Updates, Deadline, Evaluation Round, Top Ideas Announced.





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CHAPTER 4

ENGAGE

LESSON #19

Get The Throne Involved

The power of activating upper management is impossible to overstate.

It will help tie your innovation efforts to your organization's overall strategy, but more importantly, it will energize people and motivate them to participate and help drive success without you lifting a finger.

We're all social animals, and a bit of recognition from peers, or even better, from the nearest supervisor or executive, can make all the difference.

If you're smart, get upper management to help promote your newly launched missions through videos or internal memos. It's the ultimate hack.

LESSON #20

Channels and Resources

Use what's available to you to spread the message far and wide so you can keep the fires of engagement burning long after the first mission has been launched.

Here are a few quick tips:

1. Intranet, internal newsletters or even guerilla marketing such as bathroom posters are great ways to spread awareness. The same channels can also be used to share success stories to keep people coming back.
2. Nothing beats the team meeting. Do a little *show and tell* where your idea management platform is introduced to people live on a big screen. Make sure people understand that this is a priority and not some small fad that will disappear in the footnotes of the meeting agenda.

LESSON #21

Sharing and Caring

Show sincere appreciation. Do this and you're already halfway there.

In our experience, it's not just about celebrating the next *big idea*, but about telling a story that includes all the small victories as well.

A lot of companies have hit the bedrock of innovation with the shovel of an unappreciative management. Don't be one of those companies.

We have already mentioned the power of peer recognition, but this goes beyond that. It's about culture, about creating something that works, where creativity and ideas thrive and blossom.

Making ideas matter starts with people, so voice acknowledgements of the creativity of those around you, and the rest will surely follow.

LESSON #22

What's In It For Us?

What and how you choose to communicate will largely determine your success. It's a language-game. And playing this game well, will result in an increased willingness to adopt and participate.

Try to see things from the perspective of the end-user you're asking to submit ideas. Do your best to speak to their wants and needs instead of focusing solely on the goals of the organization.

Why, specifically, should people participate? Make sure everyone knows what will happen to their ideas and how much you appreciate their input.



LESSON #23

Keep Your Process Simple

Take what's good about your current process and map that version in a simple and practical way to your idea management platform

If you don't have a process yet, we suggest the **simple idea funnel** mapped below. It makes sure every idea gets a chance to be improved before it is evaluated. That keeps things positive and everyone gets feedback.

LESSON #24

Automate Where Possible

For every phase you add to your funnel, you add complexity and you add work. Be sure to help with automated progression, smart rating, automatic filtering and integrations wherever you can.

In a way, the future of innovation is automated.

LESSON #25

Co-Manage

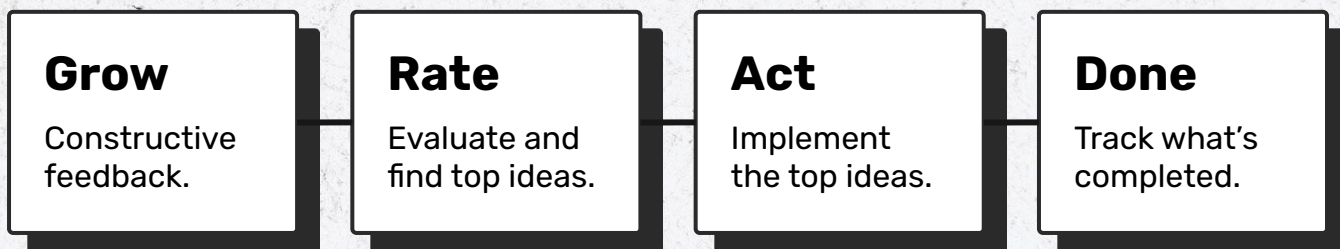
Every phase you add to your funnel is an opportunity to involve people and make smarter decisions, together.

You might invite 8 experts to rate ideas in one of the phases, or invite project leaders to an implementation phase. It's all up to you and about who you can mobilize.

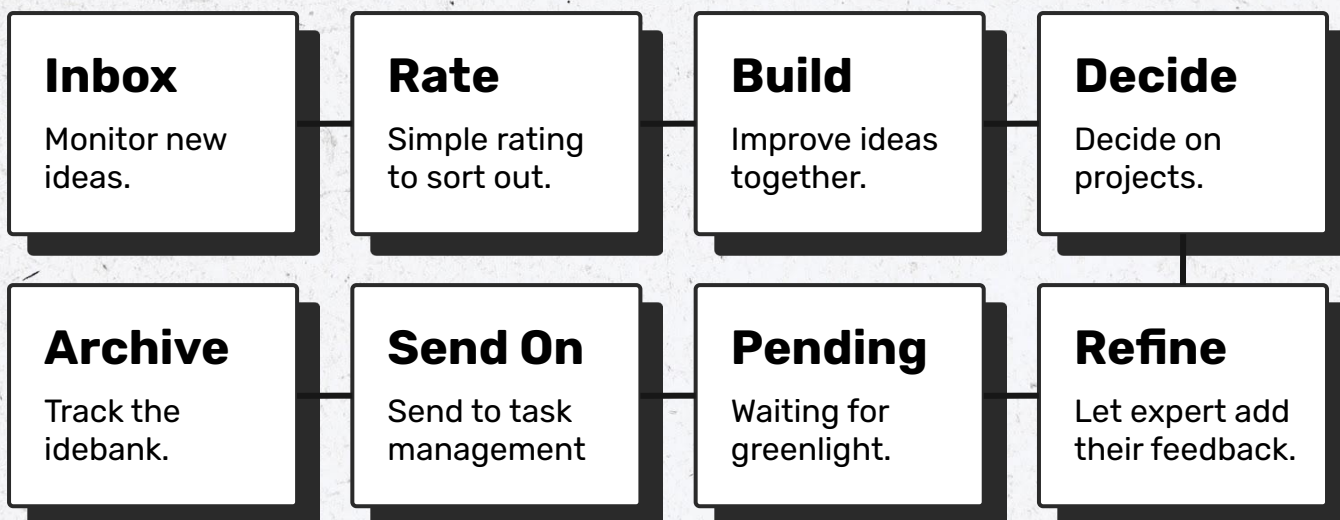
If it's just one person moving ideas, it's harder to have the same degree of impact. Sharing the burden gives people a necessary feeling of ownership in an important process. It helps **keep the process transparent, fair and efficient**.

In the end, idea management gets stronger the more it is engrained in a company's DNA.

SIMPLE IDEA FUNNEL



ADVANCED IDEA FUNNEL





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CHAPTER 5

MEASURE

LESSON #26

Monitor Engagement

Get better at managing continuous engagement by tracking it over time.

Idea management platforms make it easy to see how many people you are reaching and how many people are submitting ideas in a given timeframe.

If engagement is one of your goals, it's important to monitor engagement in the first hours, in the first week, and later on - in general.

With the data in hand, you can take action. We've had customers create competitions about most ideas *by market* when they saw that certain countries submitted more ideas while others slacked off.

We have seen graphs go up over time and graphs go down. Monitor that curve.

LESSON #27

Track Impact From Day One

It's good to get ahead early.

When you create your customized idea submission form for your first mission, why not include a slider that invites people to reflect on potential return on investment for their idea.

Our most successful customers are always inching closer to effectively tracking their ROI - and you should too - that's why idea management tools are often filled to the brim with live stats, innovation charts, a funnel overview, and a slew of engaging leaderboards.

LESSON #28

Power in Numbers

Build a network of knowledge and ideas over time.

Modern idea management comes with the perks of natural language processing.

That means, the more ideas you submit, the easier it is for a system to recognize patterns and help you find similar ideas, categorize them automatically and send them to the right places.

Beep-boop. There's built-in AI. Let smart and benevolent robot-overlords perform all the tedious work of sorting and categorizing ideas, so you can focus on other more important things!

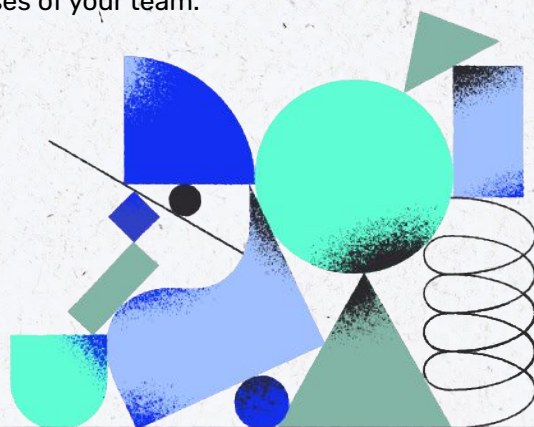
Using tools like these, you can also link and unlink ideas to break up existing clusters or create new ones of your own. Or even identify people working on the same ideas across languages.

LESSON #29

Take A Deep Dive Your Way

You love numbers... especially when they're neatly organized to help tell the story of your brilliant innovation efforts.

Export all platform data to Excel or take a deep dive into the specifics by looking at individual missions, teams or time periods, so you always have the right numbers in handy to tell your story and share the successes of your team.





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SCALE

USTER'S CONTINUOUS INNOVATION

If you are familiar with the textile machinery industry then USTER Technologies needs no introduction. USTER has been a global leader in textile quality control for the last 70 years.

Today, with 4500 customers across 75 countries and 3,5 million systems installed worldwide, the USTER brand is synonymous with the highest quality standard in the industry. The company has been extremely successful in implementing new technologies one step ahead of competitors which for the large part can be accredited to the innovative creativity of their staff.



"Before using Ideanote we didn't have any structured online system for collecting ideas, and certainly not for collecting ideas worldwide. Individual teams had their local solutions, such as collecting ideas on project reports, but we didn't have any structural process worldwide."

"Today, we have around 500 active users. We have four different ways of collecting ideas, such as missions for general suggestions in a specific location (i.e. local idea boxes), open-ended missions for product improvements, open-ended missions on specific topics, and targeted time-limited missions (i.e. idea campaigns).

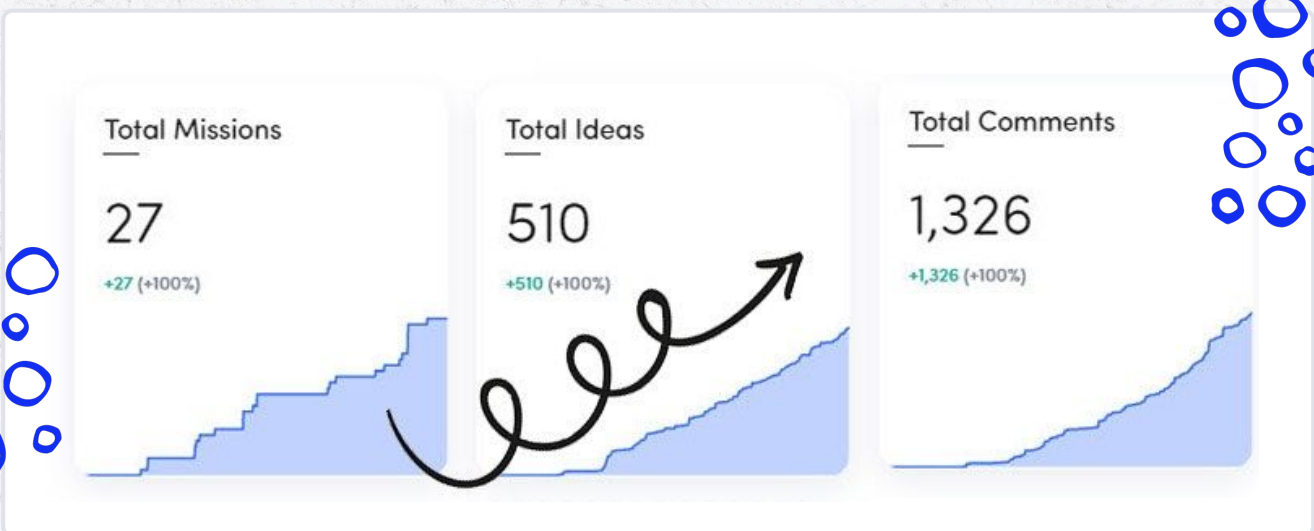
The process is supervised by a core team of five people, each responsible for implementing the system at their location.



“What is more, each of the missions are also supervised by an appointed idea facilitator. All of them have clearly formulated roles that are communicating via internal tools.

Transparency is a very important part of the platform. It is important for people to be able to see what happened to their ideas. People want to know who is looking at their ideas, what happens to the idea in each phase, who comments on it, etc. Ideanote allows them to observe their input directly. We also created recognition and reward initiatives on the local and global levels in order to reinforce this feeling. We celebrate small and big achievements and give credit to participants and active contributors.

My favorite feature is phases. Each posted idea goes through four phases: Grow, Rate, Act and Done. This provides a lot of transparency and supports the process of handling ideas very well. Now, we can also move the ideas by simple drag & drop functionality, which makes it even easier. Another very important feature is the ability to assign people to an idea that is ready to be implemented. It makes the whole process very efficient.”



Today USTER has collected 510 new ideas. With a 70% engagement rate, they have already implemented 106 of these.

LESSON #30

Scale Internally

Did you start out with limited-scale internal idea management? Great!

Once you've mastered one team, one department or one limited audience campaign, you can scale across more departments with ease and duplicate your success. It might be possible to roll-out idea management in a third of the time - and you can achieve economies of scale on your ROI.

LESSON #31

Scale Your Channels

Remember back in the days when we had the dusty suggestion box in a corner?

You revolutionized that. You gave your people a challenge to submit ideas to. Broaden that approach and capture more ideas with integrations, embeddable widgets, and more.

Opening up for more channels and integrating them into your existing ways of working over time means you make sure good ideas never get lost - and people know they can innovate every day.

LESSON #32

Scale Structure And Share Responsibility

You launched a challenge for business development or marketing. You involved stakeholders that have now been through the mill.

If you want to scale your success, you need to find people that can take on responsibility as you scale it to more parts of the organization.

Imagine Gareth from Sales being in charge of running a quarterly idea collection for his department.

Giving up power and passing on responsibility is the best - nay - the only responsible way to scale your innovation over time. Build some muscle and flex it.

LESSON #34

Turn Continuous

It's not everyone's dream. Some companies just want to run a yearly campaign where they involve people and then work on these as the year passes.

But more and more companies turn to continuous innovation, and idea management platforms are getting better at supporting it, too.

Continuous Innovation is the notion that idea collections, if managed well, can run virtually forever. This is what we believe in more than anything!

LESSON #35

Make It A Tool

No matter how collaborative and continuous idea management is, it will never become as bottom up as just putting your idea management tools directly in the hands of the majority of your employees.

If you're ready for it and have set up the proper structure and restrictions, you can open up your idea management platform for people to create their own idea collections.

Template collections for workshops, digital brainstorming, replacements for meetings, and even personal idea management.

Yes, it might sound overwhelming - but in the end, if set up the right way, idea management can democratize the power of innovation across your entire organization. Imagine an organization where proper idea management tools are used right alongside chat, document sharing and presentations

Idea management can be a skillset and a superpower available to anyone in your organization.

But why?

Because people want autonomy and purpose, and they want to feel connected to their work via powerful and transparent processes.

We need to develop a new way of doing things. We need to be more resourceful, more open, more playful, more simple, and more engaging.





Your Modern Guidebook to Manage Ideas

Authoritative, actionable strategies and examples
on how to implement modern idea management.

Ideanote builds end-to-end idea management
that businesses of all sizes can use to accelerate
their growth across the innovation lifecycle, from
idea collection to engagement and measurement.
www.ideanote.io

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