

The Moment

# Setting up Your Innovation Team for Success

A guide for leaders and intrapreneurs who need to establish a solid foundation for challenging projects.

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The Moment works with leaders and teams in organizations facing disruptive change to build a long-term capability for innovation.

Our innovation programs help develop the strategies, projects, capabilities, knowledge, and culture that will enable organizations to continuously create new value and positively impact the lives of people.

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Ideas are the easy part.  
Creating innovation outcomes that  
stick...where do we start?

# Innovation is Risky Business

## INTRODUCTION

Corporate innovation initiatives fail more often than they succeed. What can you leverage from the lessons learned by others in your position to set up your new projects for success?

This guide will walk you through a model based on best practices we at The Moment employ in our client projects. These practices are based on our own experiences, as well as drawing inspiration from innovation practitioners around the world from whom we have learned along the way.

If you are reading this, you are probably a leader who has experienced how hard it can be to create innovation outcomes that stick. You may have experienced how great ideas fail when they first touch the harsh realities of the marketplace, or a wider organization that wasn't ready to support the needed change. You may have seen that ideas aren't enough and realized that, in fact, ideas are the easy part of innovation.

You may be an intrapreneur - someone who has been charged with carrying the innovation agenda in an otherwise traditional organization. You are well-versed in the "art of the possible", and know that sometimes the thing you need to do is to work

around the organizational structures and protocols to get things done. You have experienced how the unwritten rules of the organization can snap back, catching you and your project team unawares and taking your project off track when barriers suddenly appear.

The following steps will help you build your initiative on a solid foundation.

## STEP 1

# Have an Innovation Framework

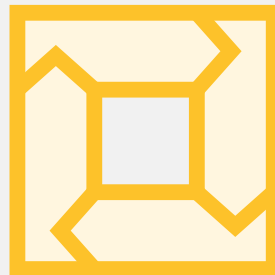
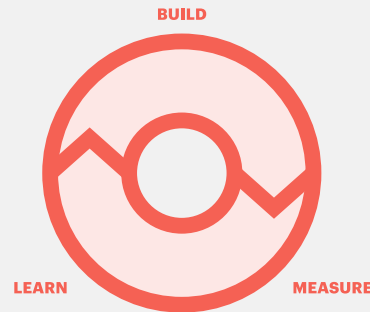
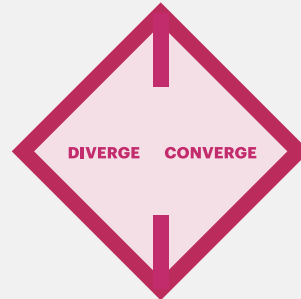
In supporting the work of innovation teams, a framework is a critical tool to create a shared understanding and language in order to align the organization. It provides the means to develop skills and coordinate the work of innovation while simultaneously keeping your customers at the centre, and creating business impact.

STEP 1  
HAVE AN INNOVATION FRAMEWORK

## The Approach

The foundations of our innovation project framework bring together a number of related practices and methods including:

- Design Thinking
- Lean Startup
- Agile Project Management



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## Design Thinking

is focused on creating value for customers using tools that elicit and distil deep insight into their functional and emotional needs in order to drive the creative process.

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## Lean Startup

methodology creates a strong discipline around creating hypotheses that can be tested early and often in order to accelerate learning based on real data.

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## Agile Project Management

helps teams create a rapid cadence of work that is able to adapt to the learning from your research and lean experiments.

## The Process

We use an innovation design process that is a modified version of the classic 4D's, the UK Design Council's Double Diamond framework.

The **Discover** phase is focused on learning about the strategic and customer context in order to clearly define the right problem to solve that will create substantial new value.

**Diverge** is focused on creating a big solution space of ideas and concepts that might be developed using the insights from the Discover phase to address the problem.

**Develop** takes one or more of the raw ideas and concepts through a process of iterative low-fidelity prototyping and testing, in order to validate that there is a case for the customer value proposition.

**Deploy** builds upon this early customer validation in order to create the business case and prepare the organization for a small scale pilot or "Minimum Viable Product" that can go to a market test in preparation for scaling up.

After Deploy, depending on the results, the options are:

- Scale up and get ready to launch
- Discontinue while capturing and integrating your learning
- Apply your learning to iterate the solution through the cycle (in whole or in part) again



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### Discover

- Research to really understand the problem
- Learning and building insights

**OUTPUT:**

Insights, Problem Definition

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### Diverge

- Generating a lot of options
- Filtering down to the top five options

**OUTPUT:**

Short-list of solutions, Additional Insights

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### Develop

- Prototyping and iterating

**OUTPUT:**

Concept Prototype, Customer Case, Business Case for Pilot

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### Deploy

- Piloting and putting it to scale

**OUTPUT:**

MVP, Market Validation, Business Case for Scale

STEP 1  
HAVE AN INNOVATION FRAMEWORK

## The Tools

Within this process framework, there are many tools drawn from the fields of design, business, qualitative and quantitative research, systems thinking, foresight, and more. There is a lifetime of learning around tools available to the innovator.

The art of what we call Innovation Design comes from having a multidisciplinary perspective and the ability to select the right tool for the right activity given the nature of the challenge, the phase of the innovation project, and the context of the organization. Innovation Designers acquire new tools constantly, engage and facilitate groups in their use, and remix, combine and develop new tools to aid the process.





## STEP 2

# Reframe the Challenge

You have probably identified an area of opportunity. You or other leaders in the organization may already have ideas about what the solution is or should look like. Now that you have a framework to support good innovation work, your immediate next task is to reframe the problem in a way that will create the conditions for powerful innovation work.

**STEP 2**  
**REFRAME THE CHALLENGE**

This may seem like a simple step, but we know from practice that so many projects start down the wrong path at this early stage.

The challenge is to shift your initial understanding of the problem you are looking to solve to the perspective of your customer.

It is not an idea, initiative, or solution. It is not a statement. It is articulated in the form of a “How might we...” question, which acts as an invitation to others to engage with the challenge in a spirit of curiosity and exploration.

For example:

**Not:** We need an app to attract millennials to our product.

**Rather:** How might we help millennials connect with our offering in a way that suits their values, lifestyle and media preferences?

It is important to acknowledge that your initial challenge statement is also a hypothesis. It should and will change in response to learning about customer needs and the strategic context in the Discover stage.

Challenge statements are powerful frames for the work of innovation teams. It is important not to become overly attached to any one frame, especially in the early stages of the project.

**Problem Framing Template**

**How might we** \_\_\_\_\_  
(enable / empower / etc.)

\_\_\_\_\_ (customer type)

**to** \_\_\_\_\_  
(customer behaviour)

**in order to** \_\_\_\_\_ **?**  
(customer need)

### STEP 3

## Setting up for Success

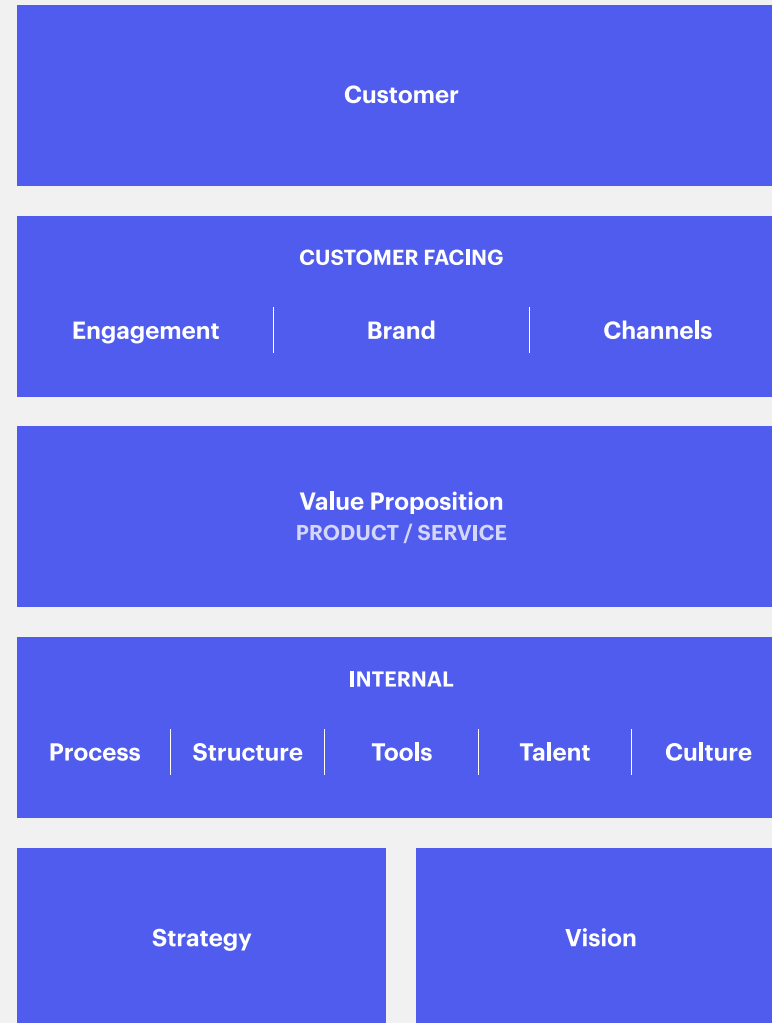
There are many different parts of the organization and types of innovation that might be involved in a particular challenge and context. Understanding these different areas and types of innovation work is critical to scoping your project, identifying the right team and preparing teams with the right tools.

**STEP 3**  
**SETTING UP FOR SUCCESS**

We use our Innovation System Map (pictured at right) to place the different types of innovation work within the context of how the firm creates value for customers. We do this by thinking like a service designer, using the metaphor of the organization as a theatre.

The Stage represents your product or service offering that is the focal point of your customer's experience. Front-of-House describes the various touchpoints of the experience through engagement, brand and channels that define the customer's relationship with your product or service. Back-of-House is defined by the processes, structures, tools, talent and culture of your organization that shape your ability to create and deliver the value you offer to customers. Vision (or purpose) defines why you exist and for whom, and your Strategy outlines the way in which you create and capture value through your business model and the steps needed to get there.

**Innovation Opportunities Map**



### STEP 3 SETTING UP FOR SUCCESS

Based on your challenge and initial problem definition, you can start to imagine the areas of the business that might require innovation. If you're only focused on product without thinking about brand, channels and supporting processes and structures, you're probably missing most of the work. If you're thinking about creating a greatly improved customer experience without looking at the product-customer fit, you're probably missing enormous areas of opportunity. And if you're learning about how customer needs and the market context are changing, you had better bring a strong strategic lens to everything you do.

The bigger, more strategic and most powerful innovation projects may impact many, if not most, of these areas. The right approach and right team will depend to a great extent upon the scoping of this innovation work.



## STEP 4

# Identify Assumptions and Risks

Innovation lives in the world of uncertainty and risk. It is inherent to the work. So you need to work with these as raw materials, not as things that you wish would go away.

Identify all the major assumptions about your project, team, customer, leadership and resources that would need to hold true for your project to be successful. This will give you a list of items you can test to validate if your assumptions are true.

You will also identify potential risks about the project, team, customer, leadership and resources that could get in the way of project success. This will give you some foresight into potential barriers that may emerge later, so you can create some strategies for mitigating those.

For example:

- A key executive resigns, disrupting the project
- The stakeholders develop inaccurate and unrealistic expectations of the project
- Inability to secure sufficient project resources places many tasks on hold
- Key decision-makers are too busy, and major decisions are delayed

Thinking ahead to what may go wrong will help as you set up your project and team for success.

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## STEP 5

# Structure and Cast the Team

There are many different ways you may structure and staff an innovation team. Many organizations are creating dedicated innovation labs staffed with specialists separate from the general lines of business. These labs are very popular in corporate innovation right now, but they also carry the risk of becoming expensive showcases that don't create business impact.

**STEP 5**  
**STRUCTURE AND CAST THE TEAM**

Innovating in a black box or a bubble creates the risk that the outputs cannot be implemented or supported by the organization. With a change in leadership, that expensive showcase may be quickly cut as “fluff”, setting back the innovation agenda in the organization by years. It is also true that back in the organization there is a lot of very useful information, intelligence, and wisdom that needs to be engaged to bring diverse perspectives into the creation of solutions. If you use the innovation lab model, its connection to the rest of the business is a critical design consideration.

The model we like best comes from Dr. Munib Karavdic and Jon Campbell from their work on “The Implementation Dilemma.” In order to create an innovative solution that can integrate with the organization in a way that sticks, scales, and realizes its value potential, you need a team structure that both creates a safe space for experimentation and exploration, and taps into and engages the collective intelligence of the organization.

**Project Team Structure**





## Business and Design Lead

In this model, two key roles drive the project. The Business Lead deeply understands the business, industry, and internal context and holds accountability for ensuring that innovations are viable from a business perspective. The Design Lead has deep expertise in design process and tools, ensures that the team is well-equipped for the work, and is particularly focused on the desirability of the solution from a customer perspective.

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## Cross-Functional Team

Surrounding these two leads (who are either fully or partially dedicated) are an enabled and cross-functional core team drawn from the operating business lines and functions relevant to the project challenge. These people ensure that knowledge is moving in and out of the project team with respect to their functional areas, and are collectively responsible to ensure that the resulting solution is feasible with the available resources in and around the organization.

What makes this cross-functional team an enabled one is the relationship with senior leaders. These are not committee members who have to go back to their bosses for insight, approval, and permission at every step. They are selected for their knowledge and access, and are given the authority to make decisions as part of the team to ensure high cadence of work. They are trusted high performers.

## Subject-Matter Experts

You will not have all the necessary expertise all the time on your core team, so you will need to identify and recruit subject matter experts, both internal and external. Fresh perspectives from different points of view are critical to good innovation work, so find the smartest and most talented people you can to be part of the extended team.

A note here on engaging consultants:

There are different kinds of consultants, who bring different kinds of expertise. Some can become an integrated extension of your team, bringing their expertise and skills in service to the team and the challenge in an agile and adaptive way. Others remain on the outside, doing their work in a black box, creating deliverables like slide decks without the internal commitment to deliver. At today's pace of change, the latter approach cannot adapt or integrate to the conditions of the organization in ways that will stick.

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## Senior Leaders

Senior leaders will need to be engaged and prepared, involved and consulted, at regular intervals throughout the work. They often need to be educated about innovation design practices in order to prepare them to support the process, and their primary roles are to connect the team to resources and to remove barriers. It is not the job of senior leaders to have the answer, or to jump the process to a solution based on their particular points of view. Business and Design Leads need to manage these relationships very thoughtfully.

## Team Styles

In casting your team, it is useful to assess individual styles and readiness for doing innovation work, in addition to knowledge and skills. We often use the Basadur Creative Problem Solving Profile tool to assess individual problem solving styles in order to ensure that the team is relatively balanced between the styles of Generators, Conceptualizers, Optimizers, and Implementers.

We also prepare team members who are new to the innovation practice around how the process unfolds, and help them to get very comfortable with ambiguity. Ambiguity walks hand-in-hand with innovation. Letting go of old mental models and stepping into an ambiguous space is difficult for most people. Your Design Lead and Business Lead will need to have experience in helping the team to unlearn old habits and move through the process.

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## Space

One thing that innovation labs get right is the importance of space. A dedicated space to support your team is an essential asset. Preferably that space is big, open, and highly flexible with furniture and fixtures on wheels that can be folded away or redeployed in a number of different configurations that will support collaborative work. You will want to be able to work on walls and whiteboards, leaving your unfinished work-in-progress up and visible to all.

This space should not just be a showroom with cool technology and furniture in it. It needs to serve the functional needs of creative work.

Even if you can't get dedicated space, there are a variety of techniques to achieve the same effect using foam-core boards and online collaboration tools.

## STEP 6

# Get Started!

Now you are ready for the real work. Time to unpack the challenge with your team and begin your journey.

By now you have:

- Selected an innovation framework
- Reframed the challenge
- Mapped the innovation system
- Identified assumptions and risks
- Structured and cast the team

You are ready to “break open the brief” with your team, unpacking the challenge and the approach to addressing it. You will go through the classic group dynamics stages of forming, storming, norming and performing.

It is helpful to understand the team’s creative styles and their readiness to do innovation work, including their comfort or discomfort with ambiguity. You will prepare the team to be highly adaptive -- ready to pivot the project at any point in response to new information and learning.

You will enable the team with the language of the innovation framework, including the approach, process and tools. The tools are best learned just-in-time, as you begin a particular activity at each phase of the project, by doing the work.

You will set up an ongoing learning and evaluation stream of activity to help the team learn new tools, and evaluate the team’s progress against clear criteria of success that are as focused on process and learning as the project outcome.

If you are not sure how to do all of the above steps, then you probably need to engage a partner to play the Innovation Designer role, to guide you and your team through these steps, selecting the right tools for the right activities at the right stage for the goals of your project and the specific context of your organization.

Setting up your teams and projects for success is just the beginning of the story. This story is called The Innovation Journey. You are cast in the role of the leader who gathers together a band of talented heroes, who are called to adventure. In this story the heroes confidently traverse uncertain and complex terrain in order to create value for others in ways that will sustain prosperous organizations through times of disruptive change.

Ready to begin?

# Innovation Project Challenge

The Moment's Innovation Project Challenge is a game-like workshop experience that supports leaders, intrapreneurs and cross-functional teams to set up their complex innovation projects for success.

We developed this tool in order to help teams get started by learning about the innovation process and helping project leaders to select activities and tools appropriate to the specific context of their project. It's a fun way to ignite and enable your project and team for success.

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