

Planview
HORIZONS®

The Planview Customer Conference

October 8-10, 2019 | Austin, Texas

The Nine Pillars for a Successful Crowdsourcing Program

Part 2: Process, Implementation, and Measuring Impact

Doug Williams

Director, Professional Services



Planview
Spigit™

"Hi, I'm Doug Williams"

Crowdsourcing Strategist



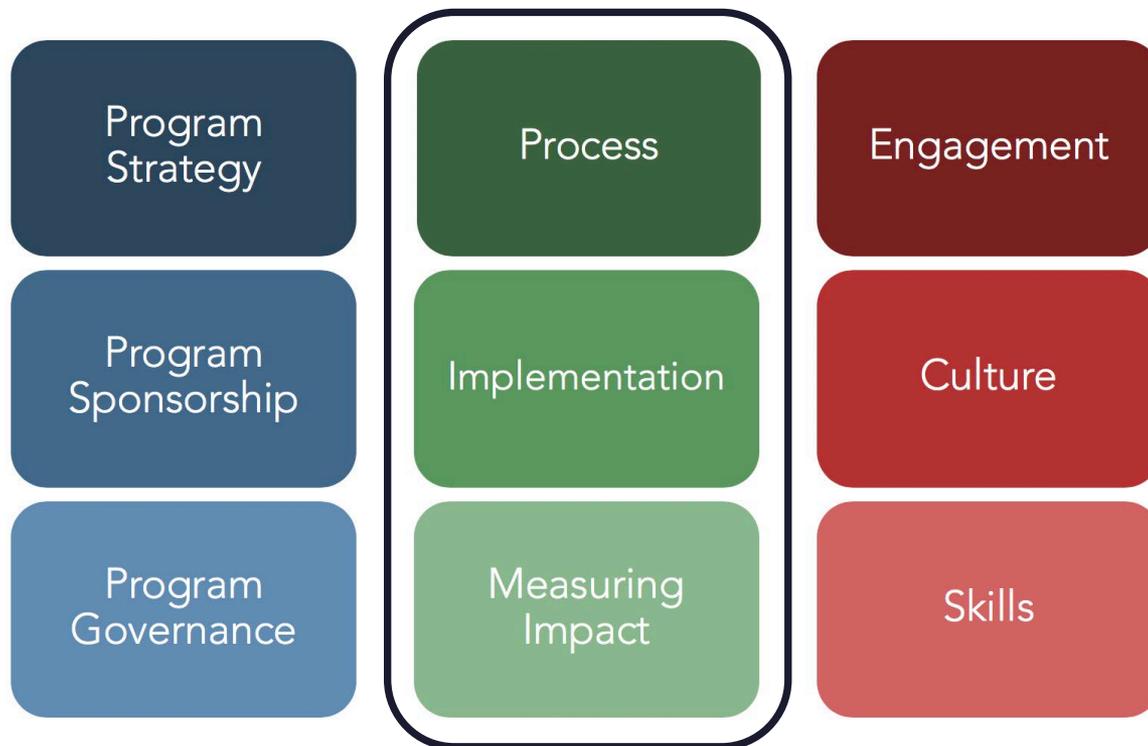
Dad



Drummer



A successful crowdsourcing program is supported by nine key pillars that will evolve and grow over time



Process

How you operationalize running challenges with different sponsors

The ideal state

Articulation

- Approach to crowdsourcing is clearly defined and articulated

Confidence

- Consistently produces results that meet or exceed challenge goals

Scalability

- Ability to gain broad awareness and adoption of program processes

Process

How you operationalize running challenges with different sponsors

How to begin

Articulation

- Quickly define a standardized challenge process that can be offered, configured, and executed efficiently

Confidence

- Run your first challenge, and use Spigit's blueprint and templates for guidance

Scalability

- Prepare to evangelize the successes of early challenges to build interest and demand

Implementation

How your program encourages and tracks progress on development of top ideas

The ideal state

Process

- Clearly articulated repeatable process for implementing ideas and provides resources and support

Tracking

- Actively track development of crowdsourced ideas

Ownership

- Employees are empowered to work on ideas and management supports their efforts

Implementation

How your program encourages and tracks progress on development of top ideas

How to begin

Process

- Research and define the approaches used within and across the organization for implementing ideas

Tracking

- Set expectations with challenge sponsors regarding follow-through on idea implementation and sharing feedback with you

Ownership

- Encourage sponsors to empower employees to work on their selected ideas (as a form of recognition)

Measuring Impact

The ability to track the direct and indirect value created for the company by the program

The ideal state

Direct financial value

- Consistent and accurate approach to measure and segment value generated by ideas, ROI

Indirect financial value

- Consistent and accurate approach to measure and segment indirect value generated by ideas

Transparency

- The measured value of the program guides our innovation strategy

Measuring Impact

The ability to track the direct and indirect value created for the company by the program

How to begin

Direct financial value

- Encourage Sponsors to estimate the primary and secondary impact of new ideas when selecting ideas for action

Indirect financial value

- Think creatively about other ways of creating value and how to measure it

Transparency

- Develop an approach for gathering, reporting, and socializing the impact the program is having on the enterprise

Want to Learn More about Spigit?

ROOM 301 / 302

TUES

- 3:00 PM – *What are Ideation and Crowdsourcing? And How Can They Transform Your Company?*
- 4:00 PM – *Leveraging Spigit for Innovation Management Across the Enterprise*

WED

- 10:00 AM – *A Journey Through Innovation Culture – Cambia Health*
- 11:00 AM – *Innovating Insurance: Holy Cow! This Stuff is Hard! – MetLife*
- 1:45 PM – *Unleashing the Power of Collective Brilliance – Aristocrat*
- 2:45 PM – *Advancing a World in Motion: Driving Culture with The Innovation Garage – Advance Auto Parts*
- 3:45 PM – *Innovation Management from Idea to Impact: Findings from the 2019 Benchmark*
- 4:45 PM – *Where will Spigit Take Ideation and Crowdsourcing Next?*

THURS

- 9:30 AM – *The 9 Pillars for a Successful Crowdsourcing Program – Part 1: Program Strategy, Sponsorship, Governance*
- 10:30 AM – *The 9 Pillars for a Successful Crowdsourcing Program – Part 2: Process, Implementation, Measuring Impact*
- 11:30 AM – *The 9 Pillars for a Successful Crowdsourcing Program – Part 3: Engagement, Culture, Skills*

Planview
HORIZONS®

The Planview Customer Conference

October 8-10, 2019 | Austin, Texas

Thank you!

Doug Williams

@DougWilliamsMHD / dwilliams@planview.com

Appendix 1

Program Assessment questions by pillar

Program Assessment questions by pillar

Program Strategy

Alignment: Our program strategy, challenge topics, and activities are fully aligned with the company's strategic objectives and priorities.

Acceptance: The business as a whole has a shared understanding of crowdsourcing, knows it is a tool that is available for use within the organization, and views it as an accepted practice for solving problems.

Scope: Crowdsourcing is used to source ideas and drive innovation across incremental, adjacent, and transformational opportunity areas for the business.

Program Sponsorship

Resources: The program sponsor has the authority and ability to consistently access budget, capital resources, and human resources to drive program success.

Passion: Our program sponsor actively promotes the values of the program (e.g., crowdsourcing, collaboration, idea management, diversity, engagement, etc.) and visibly associates him/herself with program growth and success.

Influence: The program sponsor is a change agent for the organization and works to align the program with corporate strategy.

Program Governance

Focus: We have a structured approach for sourcing challenges from the business, and for evaluating, selecting, and prioritizing actionable ideas to deliver maximum return for the business.

Cross-functional: We take a holistic approach to crowdsourcing and idea management by involving diverse groups and individuals throughout the ideation, collaboration, implementation, and measurement processes.

Structure: Our program has a defined home in the organization with clearly defined structure and roles, and the ability to serve the needs of the entire business.

Program Assessment questions by pillar

Process

Articulation: We have a clearly defined and articulated approach for running challenges, and we have the tools and artifacts needed to help challenge sponsors understand the approach

Confidence: Our approach to crowdsourcing consistently produces results that meet or exceed the challenge goals and success factors.

Scalability: Our processes allow us to efficiently generate interest and satisfy demand for challenges from all parts of the business.

Implementation

Process: Our company has a clearly articulated repeatable process for implementing ideas, and provides the necessary level of human and financial resources to support this process.

Tracking: We actively track development of ideas/projects with robust dashboards that assist with reporting and strategic planning.

Ownership: Employees are empowered to work on ideas/projects, and management supports their efforts.

Measuring Impact

Direct financial value: We have a consistent and accurate approach to measure and segment the financial value generated by ideas sourced from our program.

Indirect financial value: We have a consistent and accurate approach to measure and segment the indirect value created by our program. Consider "Indirect value" to be value created through use of the platform that is not directly tied to implementing a new idea (such as incremental revenue, cost savings, or productivity enhancements). Indirect value created by the program as a whole might include improvement in employee engagement, reduced employee attrition rate, speed of the innovation process, skill building, employee satisfaction, and the like.

Transparency: The measured value of our program across incremental, adjacent, and transformational opportunities is socialized internally, and helps guide our innovation strategy at the enterprise level and within business units.

Program Assessment questions by pillar

Engagement

Experience: Our program team provides a high-quality experience for challenge planners and active challenge participants.

Participation: We have a clear picture of who is participating in crowdsourcing, what they are doing, how frequently they do it, and the quality of their contributions.

Sustainability: Our employees have visibility into the outcomes of crowdsourcing campaigns, see crowdsourcing activities as a part of everyday work, and are self-motivated to participate.

Culture

Strategy: Our organization's leadership expects and encourages collaboration between and amongst employees at all levels within the organization, and with external parties.

Creativity & change: Our company is open to change, sources opportunities for change from employees, and encourages experimentation.

Teamwork: Employees work together within and across departments to share knowledge and drive improvements in the business.

Skills

Competency: Key employee skills and competencies (such as creativity, ideation, collaboration, critical thinking, subject matter expertise) are tracked, nurtured, and leveraged effectively within our crowdsourcing program.

Thought leadership: We are viewed as a crowdsourcing leader in our industry because we try new and creative approaches, use cases, and experiences to drive engagement and value for the business, and we socialize these initiatives with the outside world.

Learning opportunities: Employees have access to a variety of on-the-job training courses and learning opportunities to improve the skills required for effective ideation and collaboration.