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| **Foundational Challenge Elements** |  |
| **\*Challenge Title (140 char)**  A short and concise title works best. Use the title in your marketing and communication efforts. |  |
| **\*Challenge URL** **(20 char)** Each “challenge” site within Spigit has a unique URL, which can be used as needed in communications and promotions to take users directly to a single challenge site | https://clientname.spigit.com/\_\_\_\_\_\_\_\_ |
| **Business Impact (not included in site configuration)**  It’s important to articulate, estimate at the time of selection, track, and measure the impact of actionable ideas. Ensure processes are in place to capture impact prior to launch. |  |
| **Challenge Sponsor:**  Who is ultimately responsible for implementing ideas from the challenge? [**Learn More**](https://success.planview.com/Planview_Spigit/User_Management/Roles/Challenge_Sponsor) |  |
| **\*Challenge Question (500 char)**  The best challenge questions are linked to corporate or innovation strategy and have measurable success criteria. When the challenge question is well formulated it stimulates engagement and collaboration to drive relevant results. [Learn More](https://success.planview.com/Planview_Spigit/10_Getting_Started/10_Defining_the_Intent_of_the_Challenge/20_Developing_the_Challenge_Question) |  |
| **\*Challenge Context & How It Works**  **Challenge Background:** What is the critical problem or business challenge you are trying to solve? Please provide one paragraph that explains the importance and relevance of this topic.  **How it Works (optional):** Content to augment the view timeline. This includes highlighting prizes, graduation criteria for each phase and intent to act on ideas |  |
| **\*Audience:**  Who is your audience for this challenge? And how many people will be invited?  [Learn More](https://success.planview.com/Planview_Spigit/10_Getting_Started/20_Roles_and_Responsibilities/80_Selecting_the_right_Audience_for_your_challenge) |  |
| **\*Moderators**  Who will you assign to act as Challenge Moderators? We recommend a minimum of 2-3 users who commit to managing the challenge for the 2 weeks of employee engagement. Please provide first name, last name, and email address. [Learn More](https://success.planview.com/Planview_Spigit/User_Management/Roles/Moderators) |  |
| **\*Subject Matter Experts**  Who will you assign to act as Challenge Experts? We recommend 3-4 users who commit to reviewing ideas. Please provide first name, last name, and email address. [Learn More](https://success.planview.com/Planview_Spigit/User_Management/Roles/Experts) |  |
| **Incentive Planning**  Who will plan and manage the incentives for the challenge? [Learn More](https://success.planview.com/Planview_Spigit/10_Getting_Started/Rewards_and_Recognition) | [Enter incentives point name and plan details if needed] |
| **Communication Planning**  Who will plan and manage the communications and marketing efforts for the challenge? [Learn More](https://success.planview.com/Planview_Spigit/10_Getting_Started/Communications) | [Enter communications point name] |
| **\*Phase Timing:**  What activities will take place during each phase of the challenge? What is the timing for each phase?  **\*Expert review timing**  By default experts can receive task assignments as soon an idea hits the required graduation criteria for Crowd Validation. This means if the idea is well received by the crowd early on, it could advance into the expert review stage before the dedicated phase. This allows experts to get a jump on their tasks early; however if you would prefer to wait until the actual Expert Review phase is about to begin to assign tasks, that is an option.  [**Learn More**](https://success.planview.com/Planview_Spigit/30_Communities_and_Challenges/10_Creating_Communities_and_Challenges/81_Configuring_Challenge_Phases) | |  |  |  | | --- | --- | --- | | **Phase Name** | **Timing (Insert start & end dates & times)** | **Activities (reflected in “View Timeline;” 100 char limit for each phase)** | | Soft Launch | Date time start  Date time end | Testing and seeding ideas (5-10 end users, moderators & experts only) | | Ideation & Collaboration | Date time start  Date time end | Idea submission, commenting & voting | | Voting & Commenting | Date time start  Date time end | Close out idea submission & focus on commenting/voting only | | Expert Review | Date time start  Date time end | Expert team performs assessments of top ideas; assign all experts in each category for each idea | | Prioritization | Date time start  Date time end | Pairwise with entire audience to prioritize expert-approved ideas | | Selection | Date time start  Date time end | Meet with sponsor to determine implementation next steps. | |

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| **Recommended Initial Settings** |  |
| **\*Voting:**  There are two options for voting: Up Vote or Star Rating  Please indicate which option you want to use. Star Rating can use either 4 or 5 stars. 5 stars is most common (think Amazon.com), but 4 stars forces the rater to choose something other than “the middle ground.” |  |
| **\*Graduation Criteria:**  **(pre-defined based on an audience size of 1,000)**  Idea Stages are key to surfacing popular, but validated ideas from your audience with a high probability of implementation success. We can adjust the graduation settings during the challenge to ensure the flow of ideas that we are targeting.  Ideas can advance to the Expert Review stage immediately upon achieving the Stage 2 graduation criteria, OR we can hold ideas in Stage 2 until the Expert Review phase begins.  [Learn More](https://success.planview.com/Planview_Spigit/Idea_Management/20_Idea_Graduation/Automated_Graduation) | * Stage 1: Submission – 10 Views, 5 Ratings, Avg. star rating of 3.0 * Stage 2: Crowd Validation – 3 Comments, 10 Ratings, Avg. star rating of 3.5   + HOLD ideas until Expert Review begins? (Y or N) * Stage 3: Expert Review – 3 reviews per idea, Avg. review score of 3.5 out of 5 * Stage 4: Prioritization – Top 10 * Stage 5: Finalists |
| **\*Post Idea Form:**  **(pre-defined in guided challenges)**  The Spigit platform can accommodate a variety of field types as part of the idea submission form. Keep in mind that overly complex idea forms can limit participation; so make sure to take a balanced approach based on your challenge needs and topic specifics.  A “Category” in Spigit is a way of grouping ideas with similar themes or attributes, like Department or Region, within a challenge. Categories are unique to each challenge and can be customized on a case by case basis. If using Categories, Moderators and Experts can automatically be aligned to ideas within those categories, such that email notifications and task assignments will align only with ideas in the assigned category. [Learn More](https://success.planview.com/Planview_Spigit/Idea_Management/10_Idea_Lifecycle/10_Creating_an_Idea_Template) | * **Idea Title** (default field): * **Category** (what are they?) * **Idea Description (default field):** Describe your idea. * **Idea Value:** What are the benefits of implementing your idea? * Image * Tags |
| **\*Expert Review Criteria:**  **(pre-defined in guided challenges)**  What criteria will be used to evaluate the ideas for implementation feasibility? What does your sponsor consider a “good idea”?  [Learn More](https://success.planview.com/Planview_Spigit/Idea_Management/40_Tasks_and_Metrics/26_Spigit_Evaluation_Form_Templates_and_Tasks) | **Criteria:** Rate the following on a scale of 1-5 (1 poor, 5 Exceptional)   * **Strategic Fit:** Idea is aligned with the challenge question for this initiative. * **Market / Consumer Impact**: Idea offers a significant advantage over the current approach. * **ROI Potential**: Advantages and benefits from pursuing this idea outweigh the likely investment * **Feasibility**: Idea is easy to try or trial with our current technical and business resources. * **Time to Market:** Idea can be implemented within reasonable period of time.   **Commentary:**   * Please describe in a sentence the one aspect of this idea that you find most compelling. (optional) * Please describe in a sentence the primary reservation, if any, that you have about trying this idea. (optional) |
| **Supplemental Challenge Items** |  |
| **\*Email Notifications**  These are the recommended way to start you may want to customize message for additional engagement & link to unique program elements  What “entity” should the email appear to come from? Default is Spigit Innovation – change to your program name?  What email address should we use for the “reply-to” address from these notification?  Additional email notifications & set up can be found [here.](https://success.planview.com/Planview_Spigit/Spigit_Notifications/Email_Templates/10_Email_Template_Overview) | Recommended email templates enabled by default in Guided Challenge:   * Idea submission confirmation to owner & moderators * Content marked as spam notice or abuse * Idea graduation notice (stages 1-4) * Idea closure notifications (successfully & unsuccessfully) * Notice to subscribers * Task assignment notifications * Share idea, private messaging & @ mention notifications * Challenge update email (daily, weekly, monthly) |
| **\*Expert review criteria visibility**  Allow end users to see review scores & feedback | On by default |
| **Team Members Enabled?** | On by default.  (Think about how team members might impact rewards and recognition, and the challenge process). |
| **User Upload**  If using SSO, the benefit of uploading users at the outset of the challenge is that it easily enables @mention and sharing of ideas, as those individuals will appear in a lookup field. If users are not uploaded, only those users that have visited the site will appear in the lookup field. |  |
| **Challenge Imagery**  Minimum of 180 pixels (w) x 110 pixels (h) but ideally 1080 pixels (w) x 600 pixels (h). |  |

**\*Items marked with (\*) are REQUIRED for Spigit team to configure site!**

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| **Participation Goals:**  Individual challenge factors such as audience size, topic relevance, communications tactics, and leadership support will create significant variances in results from challenge to challenge. However, the table to the right can assist in providing a benchmark gauge as to challenge health. | **Participant Engagement: 1500 audience**   |  |  |  | | --- | --- | --- | | Action Type | Target (%) | Target (#) | | Unique Visitors (# of users that visited the challenge) | 25% of audience | 375 | | Unique Participants (# of users that submitted at least 1 idea, comment, vote, pairwise vote, prediction vote, or review) | 40% of visitors | 150 | | # of Ideas | 15% of visitors | 56 | | Unique Ideators (# of users that submitted at least 1 idea) | 10% of visitors | 37 | | # of Comments | 50% of visitors | 187 | | Unique Commenters (# of users that submitted at least 1 comment) | 30% of visitors | 112 | | # of Votes | 100% of visitors | 375 | | Unique Voters (# of users that submitted at least 1 vote) | 40% of visitors | 150 | | # of Pairwise Votes | 100% of visitors | 375 | | # of Pairwise Voters | 40% of visitors | 150 | |