

Innovation Roles  
The People You Need for Successful Innovation

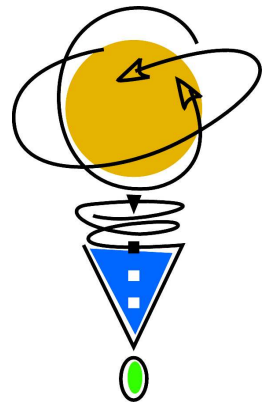
A White Paper

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## Introduction

Innovation is the way to drive growth in your organization. Innovation management, what we like to call Innovate on Purpose™, is a structured business process to help people innovate. When we talk about “innovation” we define innovation as putting ideas into valuable action. This means that merely being creative is not enough. An innovative firm must move ideas from the concept stage to the evaluation stage, through a new product development or prototyping process, and then launch a new product or service. Thus, innovation can be thought of as a business process which can be managed just as quality is managed, as the sales pipeline is managed, and as other business processes are managed. The difference is that innovation is the one process that organizations can use to grow. The other processes are generally geared toward wringing the most efficiency out of the current business—cutting costs. You can’t cut your way to growth. You have to have people who can collect ideas, pick the right ones rapidly, and put them into action that generates value.

The key here is people. Any worthwhile endeavor involves having the right people doing the right things the right way at the right time. That’s the focus of this white paper—to help you identify the people in your organization that can help you Innovate on Purpose.

Hundreds of books, papers, and articles have been published in the last two years defining and advocating innovation. Our approach is a fairly straightforward one – treat innovation as a sustainable, repeatable business process that you can measure and manage. Innovation and innovation management are too important to be left to chance, and too often are not supported by processes or by systems.

Our approach is people centric. Too often in many firms, a “champion” is designated and works to push an idea forward, almost like a “lone ranger”. We advocate a more collaborative and holistic approach, leveraging the insight and skills of many different people. The right people are the key to any organization’s success, so it stands to reason that in addition to understanding what the innovation management process is, you have to understand how people will implement it in your organization.

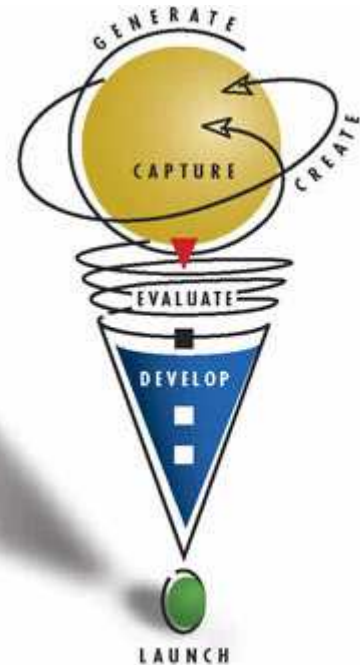
We’ll cover the basic innovation management methodology and framework so you’ll have an overall picture of managing innovation. Then we’ll look at the people you’ll need to be successful with innovation. These people will not be defined by organizational title (e.g. VP of Marketing) but by the role they play in the innovation process (e.g. Connector). Find the right people who can fill these roles and your innovation initiative is ready to start.

Ultimately, no matter how good your ideas are, and no matter how strong your processes are, if your teams don’t work to support innovation then your firm won’t be innovative. The people and the roles they play hold a real key to innovation.

## Innovate on Purpose

Let's start by identifying the process for managing innovation—what we call Innovate on Purpose. It consists of five steps:

- § **Generate** great ideas—the raw materials of innovation
- § **Capture** all ideas, regardless of the source.
- § **Evaluate** the ideas based on a common framework.
- § **Develop**—from rapid prototypes to final versions of your new product or service.
- § **Launch** and sustain the new product or service.



These steps are somewhat linear; however, there are loops in the process. For example, once ideas are evaluated as having potential, it's critical to develop prototypes to quickly get the ideas in front of users. This will determine which ideas to develop further and incorporate valuable feedback to make the ideas better. Similarly, during evaluation it's important to think about launch, since how the innovation is launched is an important consideration in resources that will need to be allocated.

Like other methodologies and business processes, the Innovate on Purpose methodology sits within a larger framework. Implementing any methodology requires that the people, processes, and culture support and enable the methodology and that you provide tools for people to do so.



For example, the number one innovation killer in an organization is the fear of failure. You simply cannot innovate without failing, sometimes in a big way. It might be a cliché that Thomas Edison knew 1800 ways not to make a light bulb filament, but it's also true. Innovation requires trying things and taking risks. If your organization can't stomach that, it won't be able to innovate. If a person's career at your organization will suffer from failure, you won't innovate. How the corporate culture supports innovation and the people involved in innovation initiatives will drive the success or failure of any firm. We'll assume for the sake of this paper that the culture supports innovation and look at the roles and types of people required for repeated, successful innovation.

## **Why do you need people anyway?**

Innovation is often viewed as a “soft” science. Innovation is hard to measure and hard to define. Other business functions such as purchasing, finance and manufacturing are easier to define and seem much more established and “concrete”. Purchasing, finance and manufacturing are accepted business functions with hierarchies and responsibilities. When we talk about innovation, however, the measurements, metrics and operations become much less concrete. Few firms have an “innovation department” and very few firms have metrics around innovation or systems and processes to support innovation.

That's why people are so important in an innovation initiative. Much of the work of innovation is at the “fuzzy front end” where there may not be as many clear cut milestones or metrics, and traditional transactional systems can't provide much value. Therefore the people, the process and the culture must fill the voids.

In a larger sense, the important things in business—and in life—boils down to people. If I ask you to go to a movie, the first question you'll likely ask is “who's in it?” If you are thinking about buying a book, most times you'll flip it over and see who recommended it. Asked to join a project, you'll likely ask “who is managing it and who is on the team?” Venture capitalists' chief interest is the management team—who will be making this venture work? The focus is always on people.

Innovation is an outgrowth of the people and the culture of the firm. If people are encouraged to innovate and compensated and motivated appropriately, the culture and processes will follow. If they are not motivated or compensated to be innovative, no amount of systems or processes will drive an innovation initiative. The people are the key to the success of innovation.

Why focus on people? Success in any endeavor is based on having the right people doing the right things the right way at the right time. If you want to implement a successful innovation initiative, you need the right people in place to succeed. People are going to implement the processes and systems to make things work. You need to identify those people. Additionally, different people bring different skill sets and viewpoints to any project, so exposing ideas and innovations to a broad team within your firm can improve the chances of success with new ideas. Finally, a few people who truly believe in an idea

can overcome many barriers and management hurdles. Many new products and services were resisted by the existing management teams and were launched only through the dogged efforts of a few true believers.

## **Getting Started—the People You Need**

If we've defined the problem and outlined the solution correctly, at this point in the paper you should be asking yourself – OK, what people? How do you choose the right people who will support and nourish an innovation initiative? What this paper will seek to provide you with is a set of important roles in innovation, and with those roles some attributes of the people who can fill those roles. Here we are less concerned with titles or hierarchies and more concerned with getting the people who can help drive each critical role or task.

In reality, you will find people in your organization that will fit multiple roles; your goal is not to find an individual person for each role listed below, but rather to make sure your team covers each of the areas identified. Many times people can play multiple roles, especially in smaller organizations.

### ***General Guidelines: The Three H's, Stakes, and Failing Forward***

First and foremost, as you seek people to fill the innovation roles you must engage peoples' heads, hearts, and hands. You should look for people with an intellectual and emotional commitment who can and will contribute their time and talents. What they do to help your organization innovate should make sense intellectually for them (head), it should be something they are passionate about (heart), and they should be able to execute in their role (hands). The greater the commitment of head, heart, and hands you have from each person, the more likely you are to succeed.

Second, try to involve someone from every business function who has a stake in delivering your product or service. In this manner you'll uncover opportunities for the new product or service you had not thought of previously, as well as challenges or issues that might not have been obvious. These people need to pass the 3 H's test as well. It's sometimes advisable to invite one or two skeptics into the mix to provide different viewpoints, as long as they are committed to the idea of innovation. Getting them involved may eventually win them over, and if so they'll be great evangelists once they are on your side.

Third, the higher you can reach in the management chain as you fill the roles, the greater your chances of success. Your goal should always be to continually move up the management chain, getting more buy in as you go and establishing legitimacy. However, don't waste time seeking senior individuals at the cost of doing nothing. Demonstrating a quick success with individuals with less seniority will attract the management team. Nothing succeeds like success.

Fourth, everyone must be comfortable taking risks. Failure is an inevitable outcome and will occur; if you are not failing, you are not innovating. The participants must be

comfortable with failure and able to quickly adapt and learn from inevitable failure and incorporate what they learn in subsequent initiatives.

Finally, as you provide tools to support innovation, such as idea management systems or evaluation schemes, everyone must remember that tools are useless and potentially dangerous without the methodology and right people using them. Tools will enable implementation but will not insure success. A CRM system will not solve customer relationship problems by itself. If you don't know your customers, understand their needs and treat them well, it doesn't matter what CRM tool you use. Likewise, implementing an idea management system without establishing processes and metrics and training users will not make your firm more innovative. Creating a suggestion box for ideas with no infrastructure behind it never works.

Here's the list of roles people play in innovation and why they are important:

### **Connectors**

Malcolm Gladwell, in his book *The Tipping Point* identifies three people required to spawn an epidemic. One of those people he calls the Connector, which is a person who is one or two degrees separated from others, rather than the typical six degrees of separation the rest of us have. Andrew Hargadon, in his book *How Breakthroughs Happen*, writes that a key element of innovation is building bridges to connect distant worlds—industries beyond your own—to generate new products/services and building networks to connect people to create and distribute the new offering. Combining these attributes with several other characteristics results in what we call a Connector.

Connectors have these characteristics. Connectors:

- § **Are a mile wide and an inch deep.** Connectors have the ability to connect departments, organizations, and industries that normally would not be connected. Although they may be an expert in their own field, Connectors are generally people you'd describe as a mile wide and an inch deep. They know things about a variety of fields and industries and can connect them.
- § **Are one degree separated.** Think of the person or people you know who can get anything through the system. They know the person in the mailroom who can expedite getting things delivered fast, they know the administrative assistants that wield the power, and they know the person in purchasing who can order the thingamabob you need. They know everyone inside and outside the organization and can connect you with them.
- § **Build networks.** Connectors build networks. Their ability to do so means that once an idea has been captured and evaluated (or even during evaluation), they can help you build the network of people to deliver the offering.
- § **Jump the tracks.** Connectors can jump the tracks, making connections with other people, industries, technologies, ideas, distribution, partners—and *they bring others along*—which is critical. Because they connect with people, they have the ability to get others to see the benefits for jumping the track.

- § **Skyscraper.** Connectors, because of their position or people they know in key positions, can easily get or make connections to the upper reaches of an organization.

It's likely that you will need several Connectors, since not everyone has all the characteristics above. The person who knows how to work the internal system is usually not a skyscraper—they usually work behind the scenes. That's ok. It's likely the Connectors you identify will know each other already.

Here's what the Connector can do for your innovation initiative: create connections to other people and technologies within your organization, and connect you to customers and business partners who can help you outside your organization. Connectors dramatically reduce the time to find the appropriate connections and improve the chance you'll make a valuable connection.

### ***Librarian***

The Librarian holds the key position of collecting ideas and providing organized access to others who can help build the library and make sense of the current collection. The Librarian provides an easy way to check in, check out (as in examine), and add to ideas, solutions, problems, technologies, and needs. Think of a library where you can write in the books or write your own books, put them back on the shelf, and allow others to do the same.

Librarians have these characteristics. Librarians:

- § **Define the “meta-data”.** Librarians determine what information is important to capture about an idea. Librarians determine what information is necessary to capture about an idea and to evaluate it. They determine the formats for the information.
- § **Help store and retrieve information.** As the number of ideas grows, so does the complexity of storing, finding and retrieving information about those ideas.
- § **Help others help themselves.** The capture of information, storage, searching and information retrieval should be a self-help mechanism. A good librarian works themselves out of a job.

Here's what the Librarian can do for your innovation initiative: define a consistent data model to help document and capture your ideas. Provide the meta-data and information tags to search and find ideas, and ensure easy retrieval. Help others in the team and associated with the team find information and add to it.

### ***Framer***

The Framer works with business functions and management to determine the appropriate evaluation schemes and frameworks teams should use to evaluate ideas fairly, transparently and consistently. The Framer:

- § **Understands where the organization is trying to go.** The strategic direction is critical in evaluating ideas, because new products and services will dictate how



fast and far the organization can go in that direction. All evaluations must be made relevant to that direction.

- § **Understands who needs to be involved to make the evaluation meaningful.** If key individuals or groups are left out of the evaluation, the idea may fail in execution because a key element is missing. Absent heads mean absent hands. The evaluation should include everyone who will be involved in executing and no more. The Framer needs to make sure all heads, hearts, and hands are accounted for in the evaluation process.
- § **Understands the need for transparency.** Contributors need to understand the evaluation process and the rationale behind it. This will help ensure that ideas are contributed because contributors understand the process is fair; it will also help contributors provide information to make the evaluation easier.
- § **Understands how an idea should be evaluated.** Different classes of ideas need to be evaluated different ways, but within those classes ideas should be evaluated consistently and in a way that allows ideas to be compared against each other so that the desired portfolio may be achieved.

Here's what the Framer can do for your innovation initiative: construct the evaluation frameworks which your team will use to evaluate your ideas, and ensure the evaluations are consistent and transparent.

## ***Judge***

The Judge evaluates the ideas, using the Framer's framework. Generally speaking there are many "Judges" for any idea – often representing business functions (sales, marketing, R&D), regions or other business silos. Judges follow the evaluation criteria set by the Framers, who worked with all the entities involved in setting the evaluation framework.

Judges have these characteristics. Judges:

- § **Evaluate ideas and determine which ideas should move forward to** prototyping, which should be tabled until an internal or external criteria is met (e.g., good idea when the price of memory falls to one dollar per terabyte), and which should be shelved.
- § **Provide the verdict on which ideas merit further investigation** and development by the organization.
- § **Document their decisions for posterity.** Too often decisions are made about initiatives and ideas, and those decisions are not documented. Eventually the idea will be considered again. Without the documentation for the decision, a team may be forced to reconsider an idea that was previously rejected.

Here's what a Judge can do for your innovation initiative: evaluate the idea against a standard framework and ensure all the business functions responsible for the idea have weighed in. Establish a verdict on the idea, to move the idea into production, end evaluation of the idea, license the idea to someone else or continue evaluation until conditions change. Document the rationale for the decision so that others can understand why the idea was approved or why it failed the evaluation.

## ***Prototyper***

Many organizations are comfortable with their new product development (NPD) process. Once they know what to make or offer they are pretty efficient at producing it. The problem they have is how to capture ideas and evaluate them. The people identified above fulfill this need; however, a key glue person you must have is the Prototyper. Between evaluation and development there is an iterative process—the Prototyper is the master who makes rapid prototyping a reality.

Prototypers rapidly create bare bones versions of your product or service. Their goal is to create enough of the user experience so that real live customers can work with the offering and provide key feedback.

Prototypers have these characteristics. Prototypers:

- § **Enjoy building mockups and “strawmen”.** They understand the temporary value of the prototype and how powerful a physical representation of the solution can be to drive new requirements or customer acceptance
- § **Are comfortable iterating and building successive prototypes.** Often an early prototype leads to requirements or needs that were not previously uncovered, which leads to the need for a new prototype.
- § **Are good listeners.** People who build prototypes need empathy with the customer and their needs. They need to translate what they hear the customer saying (and not saying) into a tangible representation of the product or service.
- § **Can handle the ejection seat.** A key function of prototyping is to rapidly identify what works and what doesn't. Prototypers can handle their role of allowing the organization to fail forward—to recognize and jettison ideas that are unlikely to succeed and thus save valuable time and money that would have been spent developing them.

Here's what the Prototyper can do for your innovation initiative: provide a representation of the idea (product or service) to the customer very quickly for feedback and further tuning. Iterate until the representation matches the customer needs and expectations. Significantly reduce the likelihood that you'll miss a key customer requirement or pursue an idea that will flounder.

## ***Metric Monitor***

You get what you measure. If you want your organization to innovate, you have to establish what you will measure to make sure this happens. These metrics range from quantitative, such as time from idea submission to launch, to qualitative, such as what was learned from a failing. Metrics should apply to each person, each unit, each division, all the way through the entire organization.

The Metric Monitor fulfills this role in two ways: monitoring the metrics and suggesting new metrics and new patterns of operating based on the results of the metrics. In the

beginning of your innovative initiative, the Metric Monitor can define easy to measure metrics to get you started: number of ideas submitted, time from submission to evaluation, time spent on innovation, etc. As you move forward, you also need the Metric Monitor to adjust the metrics based on the organization's progress and processes.

In addition to defining the metrics, the Metric Monitor examines successes and failures in your innovation process. They recognize patterns of what works and what traditionally hasn't. The more patterns they see, the better your organization will be at identifying factors that help you innovate better.

Metric Monitors:

- § **Work with the management team to set achievable goals for innovation.** Innovation is a process, and should be measured and managed like a process. The management team should set reasonable goals and measure results against the goals.
- § **Establish metrics for measuring your innovation process** (e.g., how many ideas are being captured, what are the long and short poles in the evaluation process, what types of prototypes are helping fail forward faster, what sources of ideas are leading to the most likely to succeed.
- § **Examine and analyze the metrics for patterns to determine what is and is not working** and help you tune your process so it's most efficient and so you understand where to focus your resources on opportunities and to correct problems.
- § **Create new patterns from observing successes and failures**

Fill this role with someone who embraces change and can handle incomplete data. Find them by looking for people who like change and like to measure things. They, like the Prototyper, will need to work with incomplete information, begin to draw conclusions, and constantly update their conclusions based on new information.

Here's what the Metric Monitor can do for your innovation initiative: They will help you establish metrics, measure the results, and find patterns in your organization for successfully Innovating on Purpose.

## ***Storyteller***

The Storyteller is one of the most valuable roles in the organization. The Storyteller's responsibility is to collect, keep, and tell stories about the organization. People respond to stories better than any other method of communication. Humans are wired this way—for the majority of our history this is how we kept and passed along records. We value relationships, experiences, and stories more than bulleted facts and mind-numbing spreadsheets. The Storyteller will help you achieve a culture of innovation, especially in the area of allowing people to fail.

Storytellers have these characteristics. Storytellers:

- § **Provide communication that matters to people.** They are the record keepers that influence how people view the organization and themselves within it. If you want to effect change in your organization to help innovate, you need Storytellers to keep help people really get what's important and to help them make an emotional connection.
- § **Reinforce the corporate culture.** Storytellers reinforce the culture by relating existing situations to instances in the near and recent past and what the organization did to succeed.
- § **Create an emotional connection to an abstract process.** Innovation requires something more than most business processes – a belief system.

Here's what the Storyteller can do for your innovation initiative: remind people of what's important, and reinforce the corporate culture.

## **Scout**

An important role in the identification of new trends and the analysis of those trends and the impacts they may have on your business is held by the Scout.

Scouts scan the future to understand how the industry is likely to change. What are the scenarios we might face? What technologies are in development that may affect our business? What might a competitor do that would upset our position in the market? What is hot in other industries that we might adapt? What are customers doing with our offerings? What are they doing with our competitor's offerings?

Additionally, Scouts have an active role. They meet with customers, partners, vendors and industry influencers to obtain insight into the market and market trends. Scouts aggregate and synthesize this information to bring back to the team for further analysis.

Scouts have these characteristics. Scouts:

- § **Read voraciously and network with others.** Scouts are very curious and gather data both in the same industry and outside of it. They observe customers in action. They also know the strategic direction of your organization and what drives it. Generally they are in a management position with external focus.
- § **Stay abreast of the latest trends and fads.** They know what products and technologies are cool before you've heard of them.
- § **Draw conclusions about the convergence or divergence of trends.** Scouts understand what's important and what's noise in the trends.

Here's what the Scout can do for your innovation initiative: define what's happening, and what's likely to happen, in your market and in tangential markets before it happens. Help you and your team understand what trends are important and should be considered as part of an innovation process.

## In sourcing versus Outsourcing

At this point you may say to yourself, “I can’t find all of the individuals with these skills and capabilities in my organization. Should I simply move ahead without them?” Well, possibly. First, however, consider whether or not you can outsource some of the roles. Several of the roles can be easily outsourced. The Scout role, for example, can be taken on by any of a number of trend watching firms. Sometimes you may want to outsource a role to ensure that there is no bias in the decision making process. You may find it easier and simpler for the Judge to be a consultant or third party not involved in the day to day decision making. Another role that can be easily outsourced to a trusted partner is the Prototyper role. There are a number of firms that can provide these skills and integrate with your process.

Some roles, however, are simply too important and too integrated in the process to outsource. The Connectors, Librarians and Framers are roles that should definitely be taken on by people within your organization. It will be difficult if not impossible to find people who can understand your organization and its culture to the extent necessary to fill these roles and the Story Teller role from outside the organization.

All of these roles are critical to a successful, repeatable innovation initiative, but, if you must do without some of these roles, then by all means ensure that you have a good Librarian, to help people record and recall ideas, strong Connectors to span the organization and bring people and ideas together, and Framers to build the appropriate evaluation criteria.

## Conclusion

Unlike a lot of existing business processes, innovation is still in its infancy as a process and thus is dependent on people rather than systems or metrics to drive it forward.

Also, unlike other processes, innovation requires a commitment and a belief system in order to succeed. After all, I don’t have to “believe” in purchasing to cut a purchase order, but I do need to believe innovation is important and possible in order to commit time and resources to an uncertain goal. I’ll see it when I believe it.

People are important to innovation, and the right people in the right roles are critical. We’ve identified a number of important roles for innovation to succeed, including:

- § Connectors
- § Librarians
- § Framers
- § Judges
- § Prototyper
- § Metric Monitor

- § Story Tellers
- § Scouts

In some firms, one person may hold multiple roles. In larger firms each role may be held by one or several individuals.

Note, however, that the roles do not define a title or organizational hierarchy. We find that the seniority of the person filling the role is important only if they are committed to innovation. If you cannot fill a role with a senior person but have a committed, more junior person, engage the process and demonstrate success and the senior people will come aboard.

Cast your net broadly. The more business functions involved, the easier it will be to implement a business process across the organization. If marketing, sales, engineering, legal and finance all have a stake in the success, they will be more likely to work together to succeed.

Engage people who are intellectually interested (heads), who are passionate about innovation or the success of the project or product (hearts) and who are willing and able to commit time and resources (hands) to successfully execute the project

Identify people who are willing to fail and will incorporate the experience from failing as a learning experience in the next project

The right people will always be key to success in any endeavor. This is especially true with innovation. Since innovation is the way to drive growth in your organization, pay close attention to the people part.

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