Innovation Workshops

Welcome to the Leadership Academy Innovation Module!

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Meet Your Instructors

Jim Kalbach

Jim Kalbach is a noted author, speaker, and instructor in innovation, design, and the future of work. He is currently Chief Evangelist at Mural, the leading online whiteboard.

Jim is the author of several books: Designing Web Navigation (O'Reilly, 2007), Mapping Experiences, 2nd Ed. (O'Reilly, 2020), and The Jobs To Be Done Playbook (Rosenfeld, 2020).

In 2023 he co-authored Collaborative Intelligence (Wiley, 2023) with Mariano Battan. Jim is also the Co-founder and Principal at the **JTBD Toolkit**, an online resource with learning, trainings, and content.

David Bland

David J Bland is an author and founder based in Northern California. In 2015, he founded Precoil to help companies find product market fit using lean startup, design thinking and business model innovation.

David has helped validate new products and businesses at companies such as GE, Toyota, Adobe, HP, Behr and more. David is the co-author of Testing Business Ideas, a practical guide to lean experimentation that contains a library of hands-on techniques for rapidly testing new business ideas.

Prior to advising, David spent over 10 years of his career scaling technology startups. He continues to give back to the startup community by teaching at several accelerators in Silicon Valley.

Program Timeline

*This is a high level timeline. See workshop content overview on pages 7 -13 for detailed, week by week assignments and expectations for your team.

📅 Mar 4 - Mar 26	PHASE 1: Pre-Work
March 4 (Mon - Fri)	Teams Select Focus Area for Project
Wednesday, March 25 **Thusday, March 26** *1 pm – 1:30 pm EST*	•Whiteboard Orientation •Meet and Greet with Innovation Team

📅 Apr 2 - Apr 29	PHASE 2: Define the Customer and the Core Functional Job Map
Tuesday, April 2 *1 pm – 5 pm est*	Introduction to Innovation and Jobs to be Done Workshop
Tuesday, April 9 *1 pm – 5 pm est*	Innovation Discovery - Introduction to Job Mapping Workshop
Tuesday, April 16 *1 pm – 5 pm est*	Innovation KPI and Metrics Workshop
Tuesday, April 23 *1 pm – 5 pm est*	Innovation Culture and Leadership Workshop

📅 May 3 - Jun 14	PHASE 3: Customer Jobs to be Done Discovery
May 3 - May 17	Conduct 10 Customer Interviews
May 17 - May 24	Synthesize Interviews to Complete Job Maps
May 31 - June 14	•Organize, refine, finalize list of desired outcomes •Select Top 5 Desired Outcomes with biggest value gaps

Program Timeline

📅 Jun 17 - Jul 16	PHASE 4: Ideation
June 24 - July 2	Facilitated Ideation Sessions & Selection of top 1-3 ideas or concept to validate with
July 8 - July 16	Build Back of Napkin Financial Models for Selected Ideas
Tuesday, July 16 *1 pm – 5 pm est*	Validation Lean Experimentation Workshop
📅 Jul 17 - Aug 30	PHASE 5: Validation
July 17 - July 23	Create Business Model Canvas and Value Proposition Canvas for Selected Idea
August 1 - August 30	Create and Conduct Lean Experiments for Top 2-3 Hypotheses
August 16 - August 30	Continuous refinement of financial model based on learnings and research
📅 Sep 3 - Oct 24	PHASE 6: Pitch Presentation
Sep 3 - Sep 13	Finalize financial Model
Sep 3 - Sep 30	Conduct at least 2 validation experiments
Sep 11 - Oct 11	Finalize Pitch Deck
📅 Oct 11	Pitch Presentations Due
📅 Thursday, Oct 24 *8:30 am – 4 pm est*	In – Person Graduation Day

Innovation Workshop

SERIES OVERVIEW

📅 April 2ⁿᵈ, 2024 | 1pm – 5pm EST

Intro to Innovation & Jobs to be Done
Led by: **Joe Carlucci & Jim Kalbach**

Overview

In this engaging workshop you'll dive into the fundamentals of scoping and investigating target jobs. Day 1 begins with an introduction to the timeline, tools and frameworks that you will use to complete the innovation team project, followed by an in-depth session on scoping a customer-centric target job, job performer, related jobs, and aspirations.

Innovation Module Overview
• Introduction to Venture Design Framework
• Program Timeline

Jobs to Be Done (JTBD) Framework
• Scope a Target Job
• Use JTBD Canvas 2.0 to define job former, target job, and aspirations

Customer Interview Planning
• Create the assets that will be used to interview customers in real life

In Class Exercise
• Define Core Job and Job Performer
• Begin filling out JTBD Canvas

Resources
• JTBD Canvas 2.0
• Screener Template

Project Room Whiteboards
• JTBD Whiteboard

Take Away

By the end of the workshop, you will be equipped with interviewing techniques and extracting essential elements using the Jobs-to-be-Done (JTBD) framework. Expect to leave with a comprehensive understanding and actionable strategies to tackle job assignments effectively.

Homework

📅 due by April 9th

• If not yet completed,complete Onboarding and Team Agreement whiteboard activity
• Complete Voice of Employee (VOE) Interview Guide
• JTBD Job Step Assignment

*Meet with your Coaches weekly

Innovation Workshop

SERIES OVERVIEW

📅 April 9th, 2024 | 1pm – 5pm EST

Intro to Job Mapping and Focus on Putting the Customer First

Led by: **Jim Kalbach**

Overview

Join us for a Day 2 of our JTBD workshop series, where you'll delve deeper into the intricacies of job analysis and storytelling. Get ready to unlock the power of job stories, discover how they can drive understanding and engagement.

Jobs to Be Done (JTBD) Framework
- Create detailed job maps, identifying essential elements and gaining insights into job dynamics.
- Write a job story for your target job

In Class Exercise
- Compile, sort and prioritize job steps
- Extract outcomes, emotions, and job differentiators

- Create job stories for your target job that reflects the prioritized step and biggest un-met needs
- Practice interview members of your cohort

Resources
- JTBD Canvas 2.0
- VOE Recruiting Document
- Example Interview Guide

Project Room Whiteboards
- JTBD Whitboard
- Stakeholder Mapping Whiteboard

Take Away

By the end of the workshop, you'll be able to explore key components such as outcomes, emotions, and differentiators, to hone your ability to understand and address job complexities effectively.

Homework

📅 due by April 16th

- Meet with min. of 2 SMEs
- Schedule 5 VOE interviews
- Begin Stakeholder Mapping
- External customer interview screener
- Start external customer interview/discussion guide

*Meet with your Coaches weekly

Innovation Workshop

SERIES OVERVIEW

📅 April 16th, 2024 | 1pm – 5pm EST

Innovation KPI and Metrics

Led by: **Joe Carlucci, Jim Kalbach & David Bland**

Overview

Measuring progress in validating novel business models is based on the velocity in gaining real evidence that the novel approach will work at scale. In this session, you'll and be introduced to the Innovation Scorecard. You will also have time to continue working on your JTBD canvases and finalize preparations for external customer JTBD interviews.

Innovation KPI and Metrics
• Learn about evidence strength for lean experiments
• Designing experimentation sequences to accelerate evidence gathg

In Class Exercise
• Complete BMC and VPC for insurance business model
• Assess confidence level gained by experiment sequences
• Introduction to Evidence Scorecard

Resources
• JTBD Canvas 2.0
• Business Model Canvas
• Value Proposition Canvas
• Innovation Evidence Scorecard
• Access to Testing Business Ideas book

Project Room Whiteboards
• Stakeholder Mapping Whiteboard
• JTBD Whiteboard
• KPI & Metrics Whiteboard

Take Away

By the end of the workshop, you'll have a understanding of the main tool for innovation accounting - the Innovation Project Scorecard. As well as an introduction to the concepts of Discovery, Validation and Acceleration and how they connect to each other.

Homework
📅 due by April 23rd

• Interview minimum of 5 VOE employees
• Continue stakeholder mapping
• Continue working on external customer interview/ discussion guide

*Meet with your Coaches weekly

Innovation Workshop

SERIES OVERVIEW

Workshop 4 📅 April 23rd, 2024 | 1pm – 5pm EST

Innovation Culture and Leadership

Led by: **Joe Carlucci & David Bland**

Overview

The Innovation Culture and Leadership workshop focuses on how we can create the right ecosystem and culture to drive innovative behaviors within our teams and across the enterprise. In this session, you will be introduced to the key elements of an innovation ecosystem and the Innovation Culture Map to evaluate the strengths and barriers for building a culture of innovation on your teams and across the enterprise. You'll also have time to work on synthesizing completed customer interviews to validate and revise your Job Maps and Canvases.

Innovation Culture and Leadership in Class Exercise

- You will engage with your team in a fun activity where you will evaluate company xyz's Innovation Culture and come up with ideas of how you and your team will personally contribute to improving it. You will also be introduced to business model shifting using the BMC.

- Sythensize Voice Of the Employee interviews

Resources

- Innovation Culture Map
- Innovation Culture Scorecard
- Business Model Canvas
- Access to Invincible Companies book

Project Room Whiteboards

- Stakeholder Mapping Whiteboard
- Innovation Culture Whiteboard

Take Away

By the end of the workshop, you'll learn what the key elements of a strong innovation culture are and have an early understanding of using the BMC to think about novel business model shifts.

Homework

📅 due by May 3rd

- Create initial set of desired outcomes from VOE interviews

- Complete stakeholder map

- Complete external customer interview/discussion guide
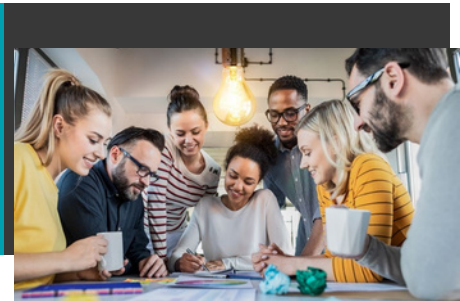**External customer interviews kick off the week of May 6**

***Meet with your Coaches weekly**

Innovation Workshop

SERIES OVERVIEW

After the April 23rd workshop, you get a well-deserved breather from weekly workshops! Hang tight, there's still plenty of work to be done. See below for what your team should be focusing on from May to June, leading up to the Ideation sessions taking place the week of June 24th – July 2nd.

📅 Due Date	May - June Homework
May 6 - May 17	Conduct 5 External Customer Interviews
May 24	Synthesize interviews to complete job maps, ID emotional and social jobs & uncover desired outcome statements for the JTBD
May 31	Organize, refine, finalize list of desired outcomes. Conduct Desired Outcome quantitative survey
May 31 - June 7	Evaluate existing, WIF & competitive solutions against customer's desired outcomes
June 7 - June 14	Refined Job Map with value gaps identified. Select Top 5 desired outcomes with biggest value gaps
June 14 - June 21	Team creates long-list of possible ideas for addressing top Desired Outcomes

Workshop 5	📅 Week of June 24th, 2024 – July 2rd, 2024

Faciliated Ideation Sessions

Led by: **Joe Carlucci**

Overview

This will be a highly interactive and fun session where your team will brainstorm on a broad array of possible ideas for addressing key customer-centric, desired outcomes that you identified during JTBD Customer Discovery. Be ready to think outside of the box and assume anything is possible. Your team will then select your top 1-3 ideas or concepts to validate via lean experimentation in the next phase of the program.

Innovation Workshop

SERIES OVERVIEW

Workshop 6   📅 July 16th, 2024 | 1pm – 5pm EST

Validation Lean Experimentation

Led by: **David Bland**

Overview

This workshop will introduce you to Strategyzer's proven methodologies for testing your novel ideas through lean experimentation. You will be introduced to hypothesis generation, assumptions mapping and hands-on design of experiment sequences for your projects.

Testing Business Ideas In Class Exercises
- Identifying Assumptions Fundamentals
- Extracting Assumptions
- Creating an Assumptions Map
- Refining Assumptions Into Hypotheses
- Selecting an Experiment
- Designing an Experiment

Resources
- Business Model Canvas
- Value Proposition Canvas
- Assumptions Map
- Test Cards
- Experiment Library (Testing Business Ideas book)

Project Room Whiteboards
- Lean Experimentation Whiteboard

Take Away

You will learn how to quickly identify unique value propositions and uncover key opportunities to differentiate potential solutions from the competition. You will also discover how to identify the right experiments to validate your riskiest hypotheses.

Homework

- Continue refining BMC & VPC and assumption map from in-class activity
- Work with coaches to create experiment sequence

*Meet with your Coaches weekly

Innovation Workshop

SERIES OVERVIEW

After the July 16th workshop, you are finally done with the workshop portion of the Innovation Module! Let the road to Graduation Day begin! See below for what your team should be focusing on from late July, all the way to the BIG presentation to the EEMT on October 24th.

📅 Due Date	July - October Homework
July 17 - July 23	Create BMC and VPC for selected idea. Start working on hypotheses lists
July 24 - July 31	Create assumptions map
Aug 1 - Aug 8	Create experiment sequence(s) for top 2-3 hypotheses that need evidence
	•Conduct lean experiments
Aug 9 - Aug 30	•Capture learnings in test cards and track progress in innovation scorecard •Conduct competitive analysis and market research on products and customer needs
Aug 16 - Aug 30	Continuous refinement of financial model based on learnings and research
Sep 3 - Sep 13	Finalize financial model
Sep 3 - Sep 13	Conduct competitive analysis and market research to back up approach and financial model
Sep 3 - Sep 30	Conduct at least 2 validation experiments with wireframe, storyboard, or other early concept prototype Pitch Deck Due
Oct 11	Pitch coaching and bi-weekly pitch dry run sessions
Oct 11 - Oct 23	
Oct 24	IN – PERSON GRADUATION DAY

Team Assignments

Team 1 - "Idea Name" (Enterprise Focus Area 2: Health Equity)

Name	Email	Department
		Corporate Strategy
		Commercial Markets
		Information Technology
		Human Resources

Team 2 - "Idea" (Enterprise Focus Area 1: Admin Savings)

Name	Email	Department

Know Before You Go

Coach Assignments

Each team has been assigned designated coaches for the Innovation Module. Your coaches will work with your team up until Graduation Day in October.

The scheduler role on each team is responsible for setting up coach calls. Email (Coach) and include Innovation in invites

Coach calls are first come, first serve

DON'T WAIT to get your weekly cadence established!

Team	External Coach	Innovation Team Coach/Support
Team 1		
Team 2		
Team 3		
Team 4		
Team 5		
Team 6		

Know Before You Go

Team Project Room Links

Each team will have a **dedicated Project Home Page and Project Room in the Bright Ideas platform**. The Project Home Page provides an executive summary of each team's project, while the Project Room serves as the vessel for project file management and workshop facilitation, all through the use of virtual whiteboards.

------ Team Project Home Pages --

Team 1

Team 2
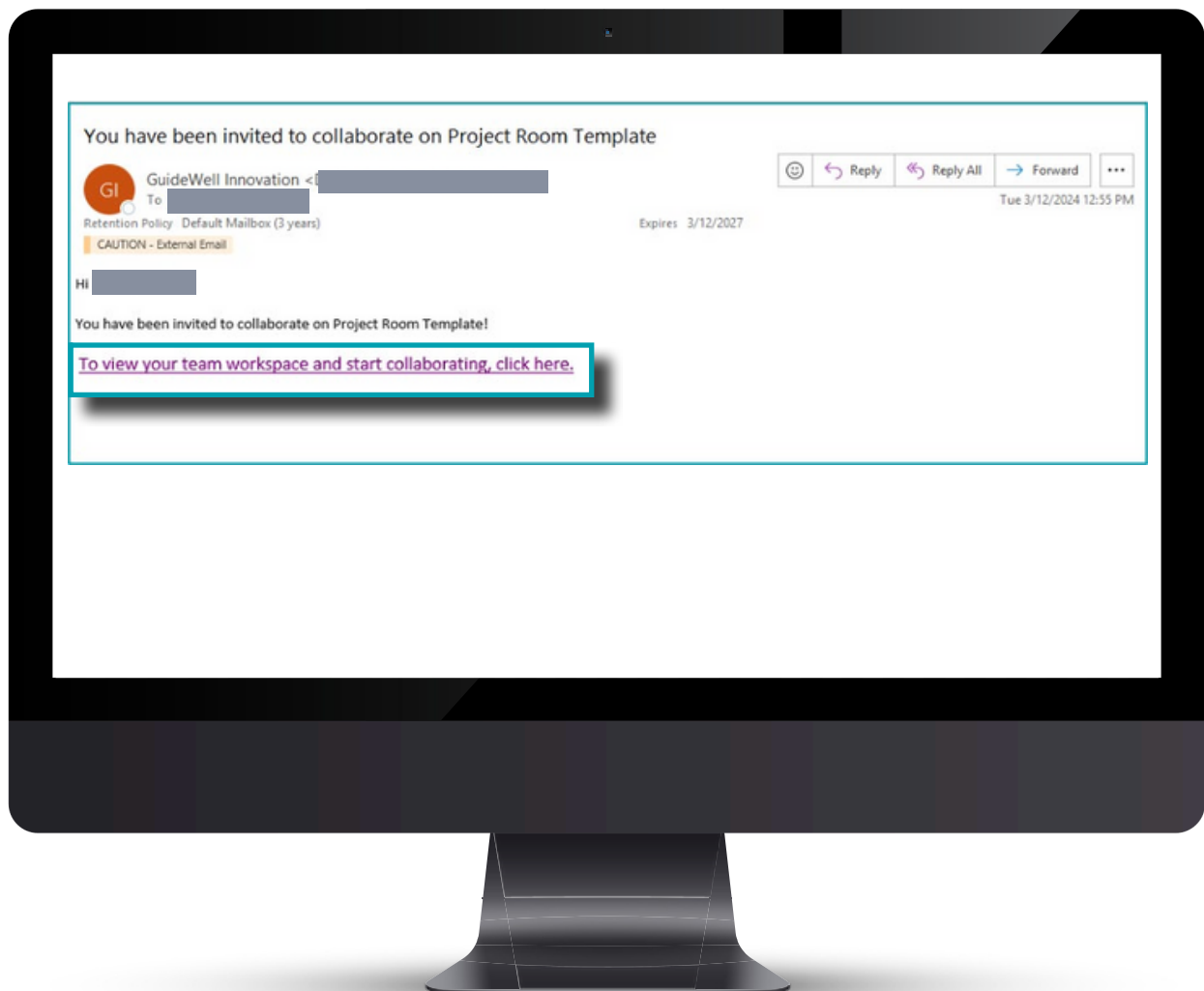
Team 3

Team 4

Team 5

Team 6

Know Before You Go

Steps to access Project Home Page

Each participant has been assigned to their corresponding team's Project Home Page and Project Room. You can find your invite to your Project Home Page and Project Room via email. Click the link from the email to access your team page.

Know Before You Go

After clicking the link from your email, you will be prompted to log into the **[Idea Management platform]**. Log in with [Single Sign On/website]. If you experience any log-in trouble, please contact:

The following innovation management platform walk-thru is Brightidea.com

Know Before You Go

Once logged in, you will have access to your team's Project Home Page. Remember, this page serves an a project overview with helpful information such as project focus area, coaches, and program timeline.
Click the Project Room button on the Navigation bar or the Project Room link on the right side panel to access your team's Project Room workspace.
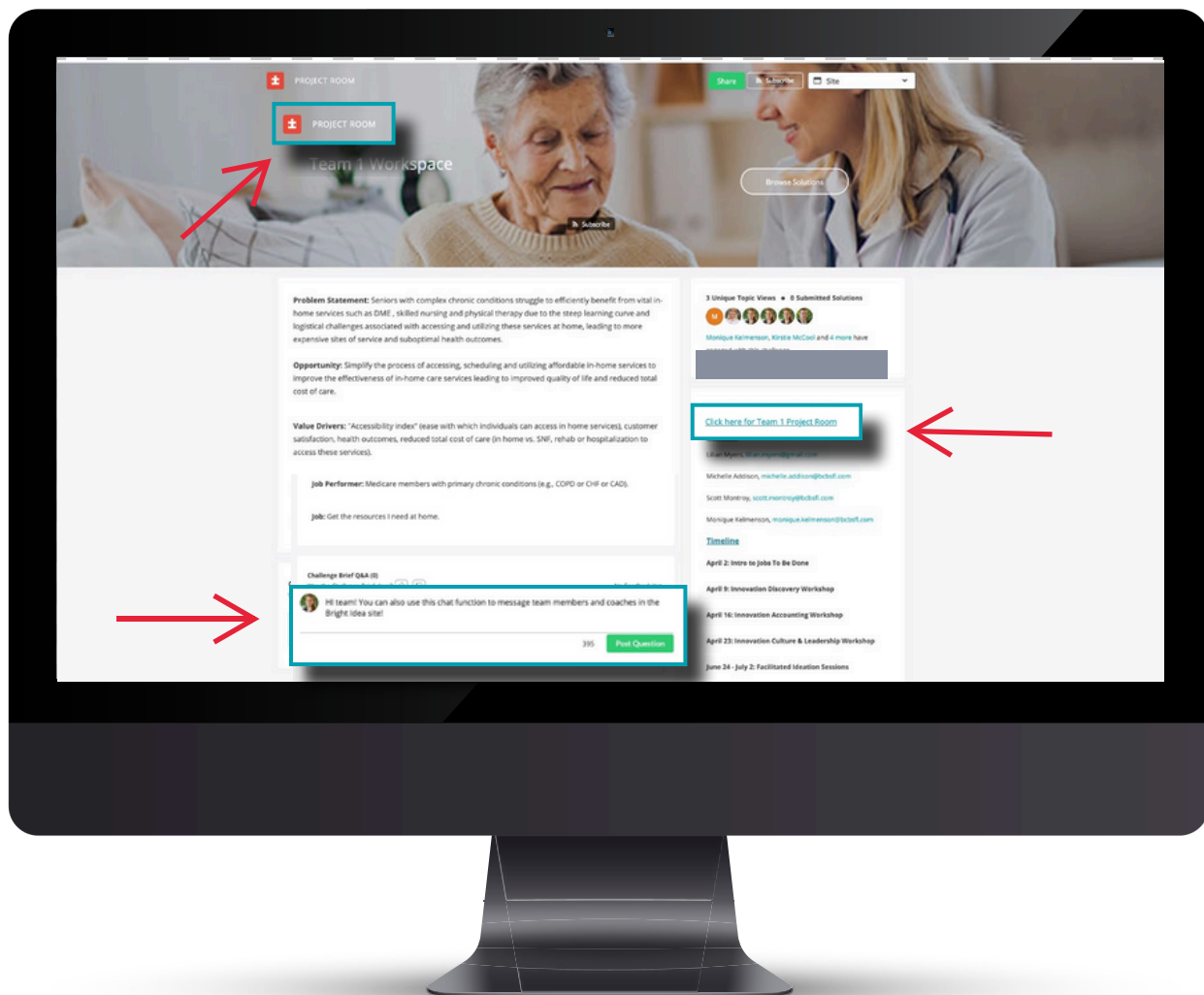

*Imporant note: There is a possibility that not all team members and coaches will have access to your Microsoft Teams chat. Utilize the chat function on your team's home page for important messages, updates, etc. to ensure all members are kept up to date and in the know.

Know Before You Go

Project Room

Here is an example of what your team's Project Room will look like. Room pages are organized by workshop. Navigation of the room pages listed on the left hand side will be discussed during the Onboarding training (3/25 & 3/26) as well as during the Innovation series workshops.
The majority of your project work will be executed and stored in your Project Room, so be ready to dive in!
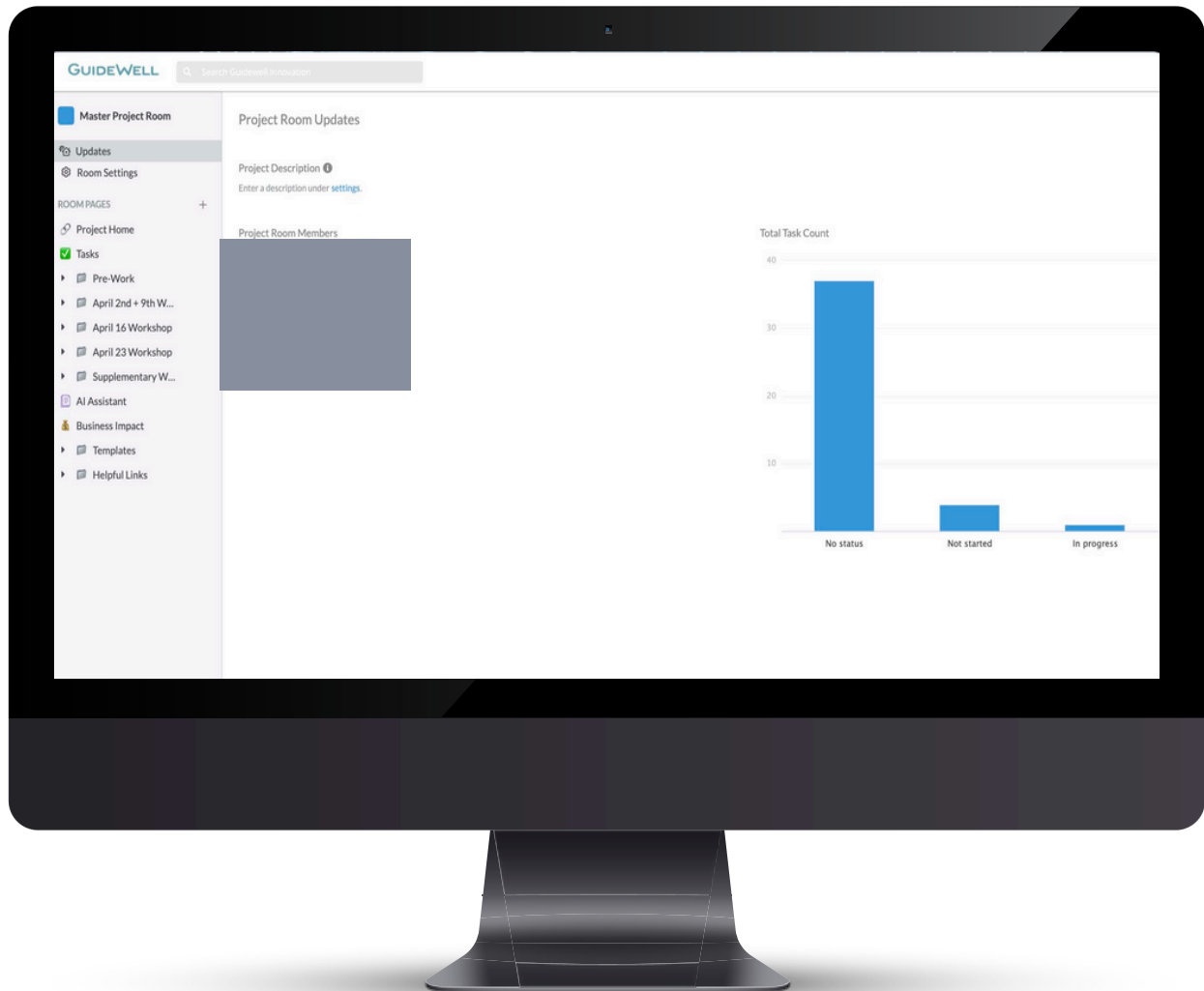
Know Before You Go

-------- Before April 2nd | Workshop 1 --

Onboarding Whiteboard Activity
Link:

Team Agreement Whiteboard Activity - Work on with Coaches
These are specific to each team and are linked in your team's project room

Set cadence for weekly coach calls
We suggest one 1 hour meeting per week. Set these up right away, there are first come, first serve

Brainstorming
Start brainstorming on Subject Matter Experts (SME's) or teams across the enterprise
with work in flight projects relating to your team's problem statement

Read JTBD Canvas 2.0 Article (10 min Read)
Link: https://medium.com/@jtbdtoolkit/jtbd-canvas-2-0-75cdbb5c4c68
Read What is Jobs to Done Article (7 min Read)

Link: https://jtbdtoolkit.medium.com/what-is-jobs-to-be-done-29a2022aff86

Read How to Formulate Job Statements Article (4 min Read)
Link: https://jtbdtoolkit.medium.com/how-to-formulate-job-statements-6175014ff3ec

Watch JTBD Introduction Video

Link: https://www.youtube.com/watch?v=Fm1EgJ9OJw8

Know Before You Go

✓ 100% attendance and participation is encourag d

✓ Engage in the chat during the workshop

✓ Participate in interactive breakout rooms and discussions

✓ Avoid multi-tasking

✓ Have your camera on

✓ Utilize the workshop materials and textbooks

✓ Ask questions and get curious

✓ HAVE FUN!

ARE YOUR LEADERS INNOVATION READY?

Is your organization innovation ready?

Train your people leaders to not only understand, but replicate and force multiply your innovation culture to leap frog your competition.

CONTACT US TODAY!

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