A Powerful (Draft) Goal
- Audacious
- Specific
- Measurable
- Timebound

5-6 "Catalytic Shepherds"
- Connector
- Attractor
- Visionary
- Subject matter expert
- Backbone representative

The Stakeholder Consultation Process
- Test, socialize, and refine the goal, definitions, scope and hypotheses
- Identify participants
- Map the system and key shifts

The System Map
- Pressure points, leverage points & choice points
- Forces for & against the change we seek
- Tensions impacting stakeholders

Collaborative Innovators
- Commitment to collaboration
- Commitment to the goal (with some skeptics!)
- Expert in their part of the system
- Balance action and learning

Critical Shifts
- Current and future statements about the system and people’s experiences within it. The network agrees on which shifts will most powerfully move us toward our goal.

A Rapid Innovation Process
- Generates and prioritizes actionable ideas for making each shift happen, and drafts those ideas into plans and prototypes (working models) that are testable.

Initiative Concepts are developed, tested, and refined based on empathy interviews with real people whose experiences we must need to change or influence to achieve the goal.

Initiative Prototypes help us refine our thinking through early testing and learn about new factors that may inform our strategy and solution design.

A Strategic Blueprint lays out a powerful narrative of how the full portfolio of initiatives will together create the critical shifts we seek.

Learning Loops help us test, evaluate, and refine our strategic blueprint and metrics to ensure that our strategy is complete, powerful, and efficient.

Success Factors

Collaborative Innovation Roadmap

CoCreative

Success Factors

Roadmap Factors

Intent
Engagement
Learning
Ideating
Connecting
Making and Scaling

Current State

Future State
Collaborative Innovation Roadmap

CoCreative™

**INTENT**
- Set initial strategic intent & audacious goal

**ENGAGEMENT**
- Interview system leaders & stakeholders 1:1
- Map key focus & strategic points
- Identify participants & convene the network
- Prioritize critical shifts

**LEARNING**
- Generate & prioritize initiative concepts
- Interview initiative users & stakeholders

**IDEATING**
- Converge around a shared analysis of the strategic landscape
- Engage stakeholders outside the network to test and refine initiatives

**CONNECTING**
- Develop an empathetic view of people’s experience to inform initiative design
- Develop & test initiative concept prototypes

**MAKING AND SCALING**
- Scale initiatives that work across the whole system

**Patterns**
- Scope the initiative by defining what’s in focus and what’s out of frame
- Test goal, shifts, scope, hypotheses with close-in allies
- Develop 30,000 ft. view of the whole system and a ground view of the human experiences within it
- Encourage team to be okay with uncertainty & confusion
- Test analyses & possibilities with more diverse set of stakeholders
- Identify the critical tensions that may impair collaboration
- Converge around a shared analysis of the strategic landscape
- Help participants be okay with working intuitively and rapidly in generating ideas
- Get everyone to agree on a shared set of the most powerful initiative concepts
- Develop an empathetic view of people’s experience to inform initiative design
- Engage stakeholders outside the network to test and refine initiatives

**Current State**
- Form Design Team
- Engage stakeholders in a deep dialogue to uncover unmet needs & desire to participate

**Future State**
- Develop & scale initiatives across the whole system
- Test & iterate on strategic blueprint
- Revisit focus, frame, and goal based on new learning

**Collaborative Innovation Roadmap**
- Engage
- Connect
- Ideate
- Learn
- Engage
- Scale
CoCreative ™ Collaborative Innovation Roadmap

**Current State**
- Set initial strategic intent & audacious goal
- Form Design Team

**Work Products**
- **Intent Map** includes the network’s audacious working goal, narrative vision of future, scope, focus, frame, critical questions, hypotheses
- **Interview Guide** includes introductory email, pointed interview questions, tips on listening effectively, notes capture system
- **Interview Reference Sheet** includes working definitions, hypotheses, goal and frame to test with interviewees
- **Interview Prospects List** includes contact information, stakeholder categorization, status of conversations, and potential participants
- **Landscape Analysis** includes key themes and gems from interviews on current barriers, opportunities and tensions across the system
- **System Map** includes forces, actors and strategic leverage points that help identify and prioritize critical shifts required to powerfully move us toward our goal
- **Initiative Concept Worksheet** includes a defined picture of audience, design principles, metrics, resources, stakeholders and steps to make the idea happen
- **Initiative Prototypes** includes a tangible and rough working example of the idea that can be tested and refined through early stakeholder input
- **Initiative Work Plans** includes roadmaps, spectrums, maturity models and timelines to bring the prototype to pilot

**Future State**
- **Initiative Prototypes** includes a tangible and rough working example of the idea that can be tested and refined through early stakeholder input
- **Initiative Work Plans** includes roadmaps, spectrums, maturity models and timelines to bring the prototype to pilot
- **Strategic Blueprint** includes all critical shifts and initiative concepts in a strategic plan, updated in regular intervals as concepts are launched and scaled