People and Knowledge

There have always been a handful of engineers who come to every TGIF. They sit in the front row and ask long, rambling questions. Every week. […] One of these questioners was a slight, brown-haired man. He had a gentle mien and always seemed to ask his questions in the form of a narrative. […] The questions were sometimes wacky, sometimes prophetic. He asked about two-factor authentication years before it was offered. Then one day, after a decade, he retired. […] It turns out he’d been one of our very early Googlers¹.

—Laszlo Bock, Work Rules!

Businesses are communities within communities that exist spatially, geographically and conceptually. Generating ideas that will be interesting enough to build consensus and lead to action across a cluster of desks, a department, a floor, or a building is a big challenge in most businesses.

Information that ideas are based on also needs to be understood, and socialized across multiple groups. If the rationale isn’t communicated effectively, people forget why a project is being talked about and acted on. Innovation work is often based on lobbying and facilitating conversations.

¹Work Rules, L. Bock, John Murray, 2015, p.135
This requires curation and investment. Managers in an innovation department have to decide what is relevant to the business and what isn’t; then they may develop a collective response to that information, whether that’s a new product, platform, or way of working. So innovation work is a deeply social act and not just a technical one. From selecting the most receptive person in a group to ascertaining the right time to tell them, innovation work is about people, what they do with information, and how they move from information to knowledge and then action.

In the previous chapter, we explored how the physical environment supports teamwork. Here, we’ll look at the social dynamics involved in innovation work. Some of what we’ll explore is a selection of psychological research along with the latest trends in work practices. Every reference in this chapter is worth exploring in its own right and should be considered a starting point for future research.

Giving permission

Work that is primarily focused on generating and incubating new ideas might not be supported by the same kind of team and knowledge dynamics as “business as usual.” However, if they’re deemed too creative and different, the team may be written off as “those crazy people in the innovation department.” Too close to business and the staff may not be motivated to rock the boat as there are enough daily challenges to keep everyone busy. There is a fine balance to be struck in making sure the conditions provided make others in a business feel like welcomed contributors.

Innovation leadership should be about managing the interaction between the internal communities focused solely on new idea generation and those that aren’t. It should be about building an environment where ideas can come from anywhere and the people who are happy to spend more time on them are free to do so. A common example is Google’s 20% rule, but the reason why this format worked is that someone is eventually curating the results. As former CEO Laszlo Bock explains in his book *Work Rules!*, the permission to work on side projects at Google did not mean every idea was worth pursuing:

A side effect of untrammeled freedom is a flood of ideas. In addition to hundreds of products, we had a project database where Googlers would log the thousands of 20-percent-projects that had been started. We had an ideas
Putting aside the effects of the culling on group morale, there was an impression of freedom and that contribution was open to all. This has become more challenging in workplaces focused on surveilling employees and micromanaging them every click of the way, especially in the knowledge economy. This creates an environment employees will fight against in order to spend time on ideas they find more exciting.

In this chapter, we’ll look at strategies to avoid creating a defensive environment. We’ll also examine how teams dedicated to innovation open themselves up to new ideas and how they select and retain relevant knowledge. The conclusions may apply to departments that aren’t so tied to novelty and new product development. If the communication and knowledge sharing dynamics within an innovation team work well, chances are it will affect positively the dynamics in other business divisions.

The right stuff?

Finding out who in your business has ideas worth backing is as important as finding out who might. It would be a mistake though to think that some people are more inventive or creative than others. There is a long history of research in organizational psychology to prove that the conditions a worker is placed in will have an effect on their ability to be creative. This is commonly misinterpreted by leaders who refuse to look at their own conditions, deciding to focus instead on hiring “the right people.”

This process might start with recruitment practices based on personality testing, based on the erroneous belief that to uncover someone’s motivations is to find out how they might react within a team. This ignores the fact that it is impossible to anticipate new ideas and, more importantly, how far an idea will go without a person already being embedded in a team, with a management structure to support them and a business as a whole ready to listen. No personality trait will enable these other, more crucial conditions.

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2Ibid, p. 135
Personality tests are sadly used in everything from HR to dating websites without any scientific basis for doing so. For an in-depth analysis of the problems behind personality and IQ tests, it’s best to turn to What’s Your Type by Merve Emre and The Cult of Personality Testing by Annie Murphy Paul. These publications explore in much more detail the history of a range of testing methods and their continued appeal today regardless of inconclusive scientific results.

Research shows that a single person’s scores are unstable, often changing over the course of years, weeks, even hours (a subject may be “a good intuitive thinker in the afternoon but not in the morning,” […]). And, worse, there is little evidence of the correlation of test scores with school performance, managerial effectiveness, team building or career counseling.

Not only are personality tests wrongly applied, they’ve also been shown to support bias. Thinking of people in “types” caters to a recruiter’s own ideas of who is worthy of employment. The Centre for Social Integration at Nuffield College, University of Oxford, showed that racism was embedded in recruitment processes. In 2015, they applied to nearly 3200 jobs, randomly varying the minority background of fictitious applicants, while the skills, qualifications, and work experience stayed the same. On average, 24% of applicants from the majority group (in this case white) received a callback from employers. Applicants with ethnic minorities needed to send 60% more applications in order to receive as many callbacks as the majority group.

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3Data in Dating: From eHarmony to Tinder & further, Eva-Maria Locusteanu, Medium.com (accessed April 2020), https://medium.com/@evamaria.locusteanu/data-in-dating-from-eharmony-to-tinder-further-88deba87eb7
4Free Innovation, Eric Von Hippel, MIT Press, 2016, p.122
5Using the Myers-Briggs Type Indicator to study managers: A literature review and research agenda, W. Garner, M. Martinko, Journal of Management, Vol 2, Issue 1, 1996, p. 45-83
6The New Republic, J.C. Pan, 2018 (accessed April 2020), https://newrepublic.com/article/151098/personality-brokers-book-review-invention-myers-briggs-type-indicator
7What’s your type: The strange history of Myers-Briggs and the birth of personality tests, M. Emre, William Collins, 2018
8The Cult of Personality Testing: How Personality Tests Are Leading Us to Miseducate Our Children, Mismange Our Companies, and Misunderstand Ourselves, A. Paul, Free Press, 2005
9‘The Cult of Personality’: Are you Normal? Think Again, S. Satel, New York Times, October 2004, www.nytimes.com/2004/10/10/books/review/the-cult-of-personality-are-you-normal-think-again.html (accessed April 2020)
10New CSI Report on ethnic minority job discrimination, Nuffield College January 2019, www.nuffield.ox.ac.uk/news-events/news/new-csi-report-on-ethnic-minority-job-discrimination/ (accessed April 2020)
Even when new technology to select CVs independently is brought in, biases remain. In 2018, Amazon’s artificial intelligence–powered CV selection tool had to be shut down when it was found to actively discriminate against female applicants.11

The idea that the “right people” can be selected also leads to the burden of creativity to rest solely on their shoulders. It willfully ignores a long hard look at the internal conditions, settings, and team dynamics that are promoted and encouraged.

What do we mean when we say conditions? If we take a school as an analogy of a corporate environment, the relationship between the student, their class, and the school shapes that student’s experience.

Sociologists Robert Dentler and Bernard Machler12 studied the behavior of a group of students in relation to creativity. They found that:

[S]ocial and personal determinants as a climate of indulgence, safety, friendliness, cooperation, permissiveness and so on, increased the originality of students. This kind of social climate suggests to the individual that he does not need to be on guard. He does not need to eliminate what is likely to be unaccepted by the environment.

So applying this analogy to the workplace, the more an employee understands how to contribute to group work, how to voice opinions, and how to take action, the more likely they are to understand where the safety net lies.

This often requires a leader or manager to really examine and question their own process and requires a degree of humility toward their own approach, which businesses in pressured and competitive industries are less likely to do. In those cases, internal processes are left ill-defined and the cult of “the right person” continues. Vague character traits are sought instead of designing more productive models of teamwork.

The easiest way to see this kind of corporate behavior in action is through the lens of the much-publicized manifestos and employee handbooks. The “Freedom and Responsibility Culture” internal guide at Netflix13 is a good example. It proudly describes innovation as one of the nine values their employees should “embody”:

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11Amazon Scraps ‘Sexist AI’ recruitment tool, M. Oppenheim, The Independent, October 2018, www.independent.co.uk/life-style/gadgets-and-tech/amazon-ai-sexist-recruitment-tool-algorithm-a8579161.html (accessed April 2020)
12Creativity: The Magic Synthesis, S. Arieti, Diane Publishers, New York, 1976, p.9
13Reference Guide on our Freedom & Responsibility Culture, Netflix, p.19, https://igormroz.com/documents/netflix_culture.pdf (accessed April 2020)
You re-conceptualize issues to discover practical solutions to hard problems. You challenge prevailing assumptions when warranted, and suggest better approaches. You create new ideas that prove useful. You keep us nimble by minimizing complexity and finding time to simplify.

This is another take on “creativity as a personality trait” and worse still since it claims innovation is one of those personal traits to be measured against others such as honesty, selflessness, and curiosity. This is repeated later as:

Our model is to increase employee freedom as we grow, rather than limit it, to continue to attract and nourish innovative people, so we have better chance of long-term continued success.

Innovative people are, for Netflix, something to attract and “nourish” as if they were exotic plants with needs beyond the needs of the rest of their workforce. The responsibility of new ideas is therefore not put on a team or an environment but on the personal ability of some rare breed of employee.

Netflix is not unique in being dismissive of the conditions they offer employees, no matter how it affects retention.¹⁴ Many Silicon Valley businesses struggle with retention as a result of aggressive internal dynamics because they assume “the right kind” of person will stay, tough it out, or come up with the necessary solutions.

Another example is a memo handed to Nike employees by co-founder Phil Knight in 1977.¹⁵ It included a set of “principles”:

1. Our business is change
2. We’re on offense. All the time.
3. Perfect results count – not a perfect process. Break the rules; fight the law.
4. This is as much about battle as about business.
5. Assume nothing. Make sure people keep their promises. Push yourselves push others. Stretch the possible.

¹⁴ Working at Netflix Sounds Absolutely Terrifying, M. Kosoff, Vanity Fair, October 2018, www.vanityfair.com/news/2018/10/working-at-netflix-sounds-absolutely-terrifying (accessed April 2020)
¹⁵ Copy of an original employee handout in 1977, https://twitter.com/dtboyd/status/1043908145863581701/photo/1 (accessed April 2020)
6. Live off the land.

7. Your job isn’t done until the job is done.

8. Dangers.
   Bureaucracy.
   Personal Ambition.
   Energy takers vs. energy givers
   Knowing our weaknesses
   Don’t get too many things on the platter

9. It won’t be pretty.

10. If we do the right things we’ll make money damn near automatic.

The mix of “we” and “you” implies that individual decisions (how you spend your time, how you manage others, how you take part in conflict) are as important as how the business as a whole acts. There might be something rallying about this memo, but the military analogies would put many off today.

If Nike’s principles were passed through a gender decoder filter today (like the one created by Kat Matfield16), the principles do not include a single “feminine-coded” word. This means they don’t overtly include concepts of cooperation, trust, or enthusiasm. They don’t describe the culture of permissiveness required for all types of people to feel confident about contributing ideas.

These kinds of externally digestible insights don’t replace a good audit. They are sometimes no more than marketing. It’s unlikely that employee handbooks like a single card at the luxury department store Nordstrom17 or a 128-page document18 at the marketing software company HubSpot really give employees an ideas of who is and isn’t allowed to contribute creatively. The proof is in the pudding at work and eventually employees find out both whose ideas are respected and whose opinions are ignored. A cursory look at the employee feedback section on Glassdoor.com will give an insight into the impact of culture on employees at every level, not just in innovation.

16 Gender Decoder for Job Ads, Kat Matfield, http://gender-decoder.katmatfield.com/ (accessed April 2020)
17 Nordstrom’s Employee Handbook Has Only One Rule, A. Lutz, Business Insider, Oct 2014, www.businessinsider.com/nordstroms-employee-handbook-2014-10 (accessed April 2020)
18 Culture Code: Creating A Lovable Company, HubSpot, SlideShare, March 2013, www.slideshare.net/HubSpot/the-hubspot-culture-code-creating-a-company-we-love/25-This_dual_personality_ofmission_metrics (accessed April 2020)
The democratization of idea generation is important for employees to feel like they have something more to contribute than just ruthless execution. By defining “innovative people” as a separate category of employees in public ways, it creates an elite of people who contribute to the business in a seemingly different way to the people managing customer calls or cleaning the office every morning. That segregation will have repercussions across the whole of the business and even before someone joins.

Job titles
In-house

There is no clearer signal of creative authority than the job title given to someone working in innovation. From an outsider’s point of view, the early signs of an innovation culture will start with the naming of the department and the people in it. Over the last 10 years, there has been a rise in trendy, often confusing job titles, especially in digitally focused businesses. Chief Happiness Officer is a common example. This role is largely an extension of traditional human resources but with a focus on managing staff communication more organically. They may also take care of onboarding new employees by building a sense of community with dedicated (often after-work) activities and mitigating the risks to a business because of an employee’s mental health, potential breakdown, or resignation.19 With all the complexities of this role, it may be that a traditional title would be too restrictive, but Chief Happiness Officer sounds a little flippant.20

The same confusion between fun and descriptive titles happens in dedicated innovation departments and functions. According to research conducted by Boards of Innovation, over 19 different job titles are used in innovation departments.21 Out of them, the ones that include a more direct reference to innovation include the following:

- Innovation Consultant
- Change Agent

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19Case Study: What does a Chief Happiness Officer Actually Do, Chartered Managers Institute, May 2018, [www.managers.org.uk/insights/news/2018/may/case-study-what-does-a-chief-happiness-officer-actually-do-its-not-hr](http://www.managers.org.uk/insights/news/2018/may/case-study-what-does-a-chief-happiness-officer-actually-do-its-not-hr) (accessed April 2020)

20Do You Have a Chief Happiness Officer?, D. Blomstrom, Forbes, [www.forbes.com/sites/duenablomstrom1/2019/01/24/do-you-have-a-chief-happiness-officer/#77f29a815256](http://www.forbes.com/sites/duenablomstrom1/2019/01/24/do-you-have-a-chief-happiness-officer/#77f29a815256) (accessed April 2020)

21Our Field Guide: Job Titles in Innovation, Boards of Innovation [www.boardofinnovation.com/blog/jobs-in-innovation-our-field-guide/](http://www.boardofinnovation.com/blog/jobs-in-innovation-our-field-guide/) (accessed April 2020)
• Chief Innovation Officer
• Innovation Catalyst
• Innovation Strategist
• Innovation Manager
• Venture Builder
• Venture Architect

CB Insights, a market research firm, wrote about 25 “absurd titles” in April 2019. These included the following:

• Innovation Evangelist
• Innovation Alchemist
• Innovation Sherpa

As entertaining as these titles might sound, they obfuscate a person’s role and place within a group. In 2012, a UK think tank the Resolution Foundation commissioned research that showed that workers ended up with more “senior-sounding” titles, but that their salaries were for middle-ranking employees.

It’s impossible to tell if a Rockstar, Ninja, or Sherpa earns more or is more senior than an Alchemist, a Builder, or a Change Agent. That confusion will not only confuse new applicants but won’t offer clarity to any future employer. Being clear in a job title enables someone to then feel confident about their place in an industry.

Having a title that sounds clear and resonates with the rest of a sector also enables more meaningful conversations between people both inside the company and out. Going to a conference and spending two minutes explaining what kind of role you occupy is a waste of a networking opportunity. By choosing a title more in line with what the role actually entails, the cross-disciplinary conversations that are so needed in a business are more likely to take place. A litmus test for a job title is whether, when you look up this same title in job search engines, you find similar ones elsewhere. If you don’t, you’ve created a job title no one else is using, so no one else can relate to. The innovative aspect of the work should be more important than how it’s described.

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22 The 25 Most Absurd Titles in Tech, CB Insights, April 2019, www.cbinsights.com/research/most-absurd-tech-job-titles/ (accessed April 2020)
23 We’re all managers now, Resolution Foundation, March 2012, www.resolutionfoundation.org/press-releases/were-all-managers-now/ (accessed April 2020)
Evangelists

Innovation work also involves caring about what happens in your sector, your peer group, and your competitors. This means keeping a constant eye on “what’s out there” to respond to it accordingly, especially when market conditions change rapidly. This is hard to do in the middle of a deadline, with a large team to manage and quarterly reporting structures.

Industry research can too often gather dust on a shelf, Internet links litter a Slack channel, and industry intelligence reports stay unread in an inbox. Quite apart from the cognitive challenges of work spaces which we’ve explored, many employees also struggle with information overload, so it’s important to examine alternative ways of building both consensus and action planning based on external information.

An approach which some companies have chosen is to give someone in their team the job of both socializing their existing work and keeping an eye on what is going on in their industry more widely. This person is sometimes given the title of “evangelist.” Borrowed from the biblical canon, the term was adopted by the companies like Apple in the early 1980s. Their first software evangelist Mike Boich started in 1982. This term continues to be used today.

This person spends a large part of their time working outside the office, attending industry conferences, speaking on behalf of a product team, and helping grow a community of clients or contributors. This is very close to a political lobbying or sales role and is often focused on building communities of interest that can help shape a product still in development. Building communities can also help a company develop industry-wide alignment or standards. The person who occupies these roles tends to be someone with a track record of working inside a business for a long-enough period to understand both the “internal” perspective and be attentive enough to the opportunities that exist elsewhere.

This is what Thomas Allen would call a “technology gatekeeper.” Far from being a negative term, he refers to them as a person inside a research lab who was able to make links inside and outside the organization. In Managing the Flow of Technology, they are described as slightly older employees who have been in the business long enough to become an internal reference as well as someone who opened doors elsewhere. This shouldn’t be confused with technology transfer or the process of finding an industry partner to exploit a patent. An evangelist or gatekeeper is there to listen to what is happening

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24 No task left behind? Examining the nature of fragmented work, G. Mark, Computer Human Interactions Conference Proceedings, 2005, www.ics.uci.edu/~gmark/CHI2005.pdf (accessed April 2020)

25 Signing Party, A. Hertzfeld, February 1982, www.folklore.org/StoryView.py?project=Macintosh&story=Signing_Party.txt&sortOrder=Sort+by+Date&characters=Mike+Boich (accessed May 2020)
outside a business and make connections with what is being talked about inside. This was perfectly captured by Robert Scoble, Microsoft’s first corporate blogger turned “tech evangelist” in an article for *The Irish Times* in 2005:\(^{26}\)

> An evangelist’s role inside a company is to help software developers build software... A good evangelist is really a good listener. But then, a good blogger is really a good listener.

By being exposed to industry dynamics, an evangelist can bring insights back to a team that would improve product development and give people a different point of view on an existing activity.

An evangelist could focus on curating content and organize discussions with a variety of teams across a business. New information can lead to new ideas only if the ideas are born from unusual communities within a business and an evangelist should be able to facilitate this.

One of the pitfalls of evangelism is that it created a kind of celebrity culture. People will occupy those roles because of their public speaking charisma in conferences, not necessarily for what they bring back into the business. The poster child has surely been David Shing,\(^{27}\) nicknamed Shingy, who acted as “digital prophet” for AOL until late 2019. He was promoted to this role in 2011 from Vice President of Media and Marketing, a job title much more understandable to any industry. He described his new role on his LinkedIn profile:\(^{28}\)

> In this role I work across both North American and International territories to identify new opportunities for the business, actively change brand perception and assist in building the external profile of the company across the globe. Not only do I speak at conferences and present to agencies and clients, but I also develop creative solutions for brands and clients.

That description seems pretty in line with any personal relations or marketing role, so why use “digital prophet”? His public persona was exploited on social media and in the technology press in order to make AOL sound trendy by association. The job title is part of that “over the top” brashness. The more he presented himself as an artist (he had studied graphic design), the more attention AOL received. And any advertising is good advertising. But hiring

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\(^{26}\)Blogging is good for business, says tech evangelist, K. Lillington, *The Irish Times*, Nov. 2008, [www.irishtimes.com/business/blogging-is-good-for-business-says-tech-evangelist-1.519297](http://www.irishtimes.com/business/blogging-is-good-for-business-says-tech-evangelist-1.519297) (accessed April 2020)

\(^{27}\)Shingy, the Digital Prophet, Reflects on His Time at AOL and What’s Next, B. Feldman, *New York Magazine*, Oct 2019, [https://nymag.com/intelligencer/2019/10/shingy-reflects-on-his-time-at-aol-and-whats-next.html](https://nymag.com/intelligencer/2019/10/shingy-reflects-on-his-time-at-aol-and-whats-next.html) (accessed April 2020)

\(^{28}\)David Shing, LinkedIn, [www.linkedin.com/in/davidshing/](http://www.linkedin.com/in/davidshing/) (accessed April 2020)
someone to be your eyes and ears and a translator between your innovation work and what happens outside is very different to a marketing role.

Internships

An often forgotten way to enable new ways of thinking in a team is by offering internships to a variety of students or graduates. The mistake is to consider a young person as a drain on resources or as meat for the organizational grinder. Many of the first researchers at RAND were in their early 20s, even leading some of the departments. Many startup founders are today in their early to mid-20s.²⁹ Some, became multimillionaires in their teens.³⁰ It’s important to remember that the biggest competitor to the internship is entrepreneurship. With that in mind, it’s important to focus on what the company as well as the individual can hope to gain.

Sectors like management consulting are very good at turning an internship into employment contracts, winning yearly employment awards,³¹ but these opportunities are often offered to specific types of graduates who come out of specific types of academic programs.³²

Other sectors like hospitality and fine arts use long apprenticeships to build a working relationship with someone starting out. That model is a good one to follow in innovation work where understanding the culture of a team will take as much time as understanding how to have impact in that team. No one wants to feel like an outsider when working in a business and this process may take up to a year. Thinking of internships as apprenticeships could allow someone to start with small tasks and move on to more complex ones inside a close-knit team. They get to fail on someone else’s dime and decide for themselves what they like about the profession and the sector at large. And if the internship leads them to go start their own business, the company will still have influenced their own sector in a positive way.

²⁹ 10 Young Entrepreneurs to Watch in 2020, Just Entrepreneurs, April 2020, https://justentrepreneurs.co.uk/blog/10-young-entrepreneurs-to-watch-in-2020 (accessed May 2020)
³⁰Summly app created by London teenager Nick D’Aloisio sold to Yahoo for millions, The Evening Standard, March 2013, www.standard.co.uk/news/techandgadgets/exclusive-summly-app-created-by-london-teenager-nick-d-aloisio-sold-to-yahoo-for-millions-8548506.html (accessed May 2020)
³¹Here Are The Top 100 Internship Programs In The U.S.—And #1 Goes To..., A. Csedrik, Wayup, August 2019, www.wayup.com/employers/blog/here-are-the-top-100-internship-programs-in-the-u-s-and-1-goes-to (accessed May 2020)
³²Rise of white-collar apprentices challenges conventional degree wisdom, K. Allen, The Guardian, March 2014, www.theguardian.com/education/2014/mar/03/raise-white-collar-apprentices-graduates (accessed May 2020)
Most innovation work, being white collar and often based on idea generation, is by definition more accessible to a wider array of people, but they're often short, unpaid, and involve no or little progression. Corporations where deadlines are tight and money is tighter will have a tendency to offer internships to a restricted “type” of person, either coming from educational institutions they already have ties to or from existing personal relationships. But the return on investment of an enjoyable internship shouldn’t be underestimated. A successful, enjoyable internship allows for the innovation team to grow a sphere of influence outside the business. People who have a positive experience are likely to share it with others and become a reference for how they, in turn, treat future interns. If the intern was perceived as a temporary customer, and their experience was negative, they’re likely to tell between 9 and 15 people instead.33 An innovation team’s appetite for risky projects, trust in their teams, mechanisms to learn from the world outside, will all be elements that shape a less experienced person’s expectations of innovation work elsewhere. A positive experience early on in a career leads to expectations around learning and sharing which help elevate the sector and diversify the number of people who can contribute to innovation efforts.

External

The misguided belief that people are creative (or aren’t) leads to a lack of trust in an innovation team if the desired level of innovation isn’t attained in the expected time. This supports the belief that creativity can be brought in from outside. This isn’t for lack of options. In 2020, advertising agencies, independent consultants, design agencies, accounting firms, and management consultants all offer some form of innovation work, or broadly speaking, “creativity as a service.” But there are important pros and cons to consider.

Working with consultants

Hiring an external partner when a company has no dedicated innovation or research function is often cheaper than either hiring new people or finding people internally and asking their manager for their time. It’s also cheaper because you don’t need to dedicate office space to them. Hiring someone unfamiliar with a company’s internal dynamics may also feel like a “fresh” perspective, but ignorance isn’t always bliss. They may face “not invented here syndrome,” which means a large piece of work they will do won’t be considered as valuable by the people having to act on their recommendations.

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33 15 statistics that should change the business world, but haven’t, C. Shaw, Beyond Philosophy, June 2013, https://beyondphilosophy.com/15-statistics-that-should-change-the-business-world-but-havent/ (accessed May 2020)
There may also be some resentment that creativity has been outsourced, further highlighting the lack of trust in people’s natural creativity if the conditions were different.

Making sure the external partner is embedded for a long time inside the business will require more time and more energy but might reap a more relevant set of outcomes. To make this more effective, the external company should conduct the type of ethnographic studies often reserved for end consumer studies. This will allow them to gather some understanding of the client’s situation, the way teams operate, any political divides, before proposing innovative solutions, workstreams, or activities. If they don’t, their work may fail to find the “stickiness” required, like a transplanted organ rejected by its host.

Something to be weary of when external partners spend time working within a company is the “IKEA effect.” This cognitive bias coined in 2011 by researchers Michael Norton, Daniel Mocho, and Dan Ariely 34 refers to the disproportionately high value placed on the Swedish manufacturer’s furniture because customers have assembled it themselves. The same principle could apply to working with a consultant. The collaboration in itself, regardless of the outcome, can feel meaningful and enjoyable. The simple act of starting and completing an activity with an external collaborator creates enough meaning to make people happy, even if it doesn’t create an innovative result at all.

Reversly, many companies are uncomfortable letting consultants close to their internal dynamics for fear of industrial espionage. They’ll keep them at arm’s length, arguing this will prevent the consultant from getting bogged down in the “day to day grind,” thus really preventing that consultant from coming up with relevant ideas and processes.

Bringing external people into an innovation process has become so habitual in some businesses, it has become their only approach to innovation. When that doesn’t reap the desired benefits, the activity is cut, shelved, and discarded, only to be revisited some years later when the CEO meets someone they like who is offering services they like the sound of. So what are they likely to offer?

Processes

Sometimes an innovation service means bringing in someone else’s process to try out. Sometimes it’s about buying someone else’s team to outsource an entire activity using a different process. Regardless of which it is, the process is what a company will be seduced by.

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34 The IKEA effect: When labor leads to love, M. Norton, D. Mochon, D. Ariely, Journal of Consumer Psychology, Vol 22, 2012, p. 453-460
The sales pitch of an external vendor of innovation services is likely to include the following elements:

1. Definition
2. Exploration
3. Convergence

No matter what industry the company is in, these components will make up the backbone of an innovation offering from most external consultants.

Over 100 models were collected by American designer Hugh Dubberly and published as an ongoing collection in 2008. “How do you design?: A compendium of Models” compared methodologies coming from management consultancies, software development firms, and designers, highlighting in his introduction the siloed nature of these processes:

[…] for the most part, designers, business managers, and software developers appear to be unaware of practices and thinking about process in the other disciplines. Even within their own fields, many are unaware of much prior art.\(^{35}\)

He also describes the infinite potential for expansion of these methods:

[…]Processes have a fractal quality. You can zoom in or out, increasing or decreasing abstraction or specificity. You can add more detail—dividing phases into steps and steps into sub-steps, almost infinitely. Processes rarely have fixed beginnings or endings. You can almost always add steps upstream or downstream.\(^{36}\)

Looking at someone else’s innovation process, the chosen lingo, and marketing speak is likely to obscure the generic nature of what’s on offer. Activities may ultimately resemble those offered by their competitors when they’re stripped to their simplest expression. Understanding the basic building blocks of any innovation process will help a company make sense of the method beyond the buzzwords. At their simplest level, they often include three core components: definition, exploration, and convergence.

1. **Definition** will be about refining the problem, the brief, or the activity further. This may be about debating the "exam question" entirely, or finding out more about how acute the problem is. This phase is about being sure a consultant understands what they’re spending time on.

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\(^{35}\)How do you design, H. Dubberly, Dubberly Design Office, 2008, p.7, [www.dubberly.com/wp-content/uploads/2008/06/ddo_designprocess.pdf](http://www.dubberly.com/wp-content/uploads/2008/06/ddo_designprocess.pdf) (accessed May 2020)

\(^{36}\)Ibid, p.13
“How Might We” is an example of a definition activity. Developed by Marino (Min) Sidney Basadur at P&G in the 1980s, it helped reframe their response to the popularity of Colgate’s Irish Spring and helped them develop Coast. “How Might We” was popularized by design firm IDEO and promoted recently by Google and Facebook’s teams. These days “How Might We…” statements are even used by graduates to describe their final year projects.

**User-centered design** This term emerged out of human factors and ergonomics research after World War II when complex technological systems developed for warfare had to be adapted to as many types of people as possible. User-centered design, user experience design, ethnography, user research, and user-centric design all describe a process which focuses on understanding the problem by asking the people who experience it or are affected by it directly or indirectly. This can take the form of interviews, surveys, observation in situ, eye-tracking analysis, and other methods. This process further helps define the work and often gives it more context.

2. **Exploration** often involves group ideation, activities that use play, the speculative production of ideas, no matter the quality, and bringing in outside perspectives. In his 2008 research, Thomas Allen identified three types of communication between coworkers: coordination, information, and inspiration. He noted that “People seldom, if ever, actively seek Type 3 communication.” This part of the process is entirely focused on addressing this gap. Different techniques will be proposed to give life to this part of a process:

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37 The Origins of How Might We, Managing Experience Conference, March 2011, [https://vimeo.com/21316624](https://vimeo.com/21316624) (accessed May 2020)

38 Combining organization and physical location to manage knowledge dissemination, *International Journal of Technology Management*, Vol 44, No 1-2, 2008
Brainstorming is a common exploration technique. Initially\(^{39}\) aimed at creating as many ideas as possible through free association in a small group, it was first developed by advertising executive Alex Osborn of BBDO and documented in his 1942 book *How to Think Up*.

Hosting startups Another form of exploration which shortcuts an internal exploration is akin to process tourism. More common in corporations with no history of investing in dedicated research activities, this works by eavesdropping and supporting other people’s exploration processes. Corporations might be invited to invest in hosting early-stage companies in their own offices or support an existing incubator. The idea here is to generate ideas in a team by watching someone else address the same industry in different ways. There’s a sort of “monkey-see, monkey-do” assumption of knowledge building.

3. Convergence through choosing from what has emerged from the exploration phase, making choices, picking elements, and applying more time and energy to them, either through delivery or development activities.

The “Double Diamond” is an example of a process which places as much importance on exploration as convergence into an outcome. Heavily influenced by the “dynamics of divergence and convergence model” published in 1996 by Hungarian systems thinking academic Belá H. Bánáthy, it was coined by UK’s Design Council in 2005. Many design agencies use the shape of this process (if not always the name) to describe their process of opening things up before selecting a few options.

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\(^{39}\)The Journey of Brainstorming, Hanisha Besant, Regent University School of Business & Leadership, Journal of Transformational Innovation, Vol. 2 Iss. 1, Summer 2016, p. 1-7
Agile software development is another type of convergence process based on iterating the outcome. It’s about working on an end product (in this case software) in a way that takes into account multiple perspectives and revisiting that end product continuously. Agile software development was developed in the late 1990s to allow for software products to be developed while accommodating continual change and input from stakeholders and customers. Initially referred to as “lightweight,” the Manifesto for Agile Development was published in 2001 coining the term within a community that has continued to grow. The principles it describes are still largely championed in software development, but the term has also caught on elsewhere with work environments frequently describing themselves as being Agile. This is an example of a process of constantly revisiting convergence.

Once a company understands what they’re being sold (definition, exploration, and convergence), they can concentrate on interrogating that process without being thrown by its supposed uniqueness.

A company may choose to compare different possible contractors on the basis of their process, but it often comes down to affordability and affability of the staff. As long as the “IKEA effect” is mitigated and the work that emerges from working with an external partner actually gets implemented, the effort of finding the right partner will have not been in vain.

Outsourcing or vicariously experiencing innovation services does not necessarily mean they become part of a company’s own habits. This is a risk as ideas could fail to engage enough internal stakeholders. But on some happy occasions where enough cohabitation exists, companies and their external contractors can come to rely on each other for many years. Companies like IDEO, Capgemini, EY, and others rely on these long-term relationships to build up international offices and cater to a wide variety of clients.

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40 To agility and beyond: The history—and legacy—of agile development, P. Varhol, TechBeacon, https://techbeacon.com/app-dev-testing/agility-beyond-history-legacy-agile-development (accessed May 2020)
41 Manifesto for Agile Development, K. Bent & al., http://agilemanifesto.org/ (accessed May 2020)
Futurists

External consultants now also include futurists. These tend to be independent consultants hired because of their professional persona and hired to contribute to either:

- An “exploration” process
- A “definition” process by selecting from the growing global information landscape and making scenarios that may have an immediate or long-term effect on a company

They contribute largely to Thomas Allen’s third type of communication: inspiration. The work of a futurist is largely about sensemaking and presenting a company with a clear path through the multiple futures it may have. People who describe themselves as futurists will have a background in anything from design to sociology, even future studies.

They tend to focus their efforts on research and exploiting a variety of communication strategies to make their message easy to communicate inside a business. Their outputs are varied but often visual and collaborative so that a number of people in a business can understand and share a “future vision.” If a team inside a business shares a vision, chances they’ll work to address it with a common sense of purpose. This is largely speculation as much of a futurists work, like other consultants, sits outside of a business. On occasion, they might work in a more integrated fashion. Not unlike an evangelist, the work done by a futurist can also take on marketing connotations. The shared vision of the future can, if shared even more widely, increase the recognition of the institution hiring the futurist.

In 2016, Richard Watson joined Imperial College London as their first “Futurist-in-residence.” In 2017, he produced (with designer Zeljko Zoricic) a London Underground map of “Mega Trends and Technologies 2017-2050” which he then published widely.

Anab Jain and Jon Arden run Superflux, a London-based studio which specializes in “Translating future uncertainty into present day choices.” Their work often takes on the form of future everyday living as illustrated in short videos. Addressing everything from smart devices to future healthcare and activism, their work is often displayed in cultural contexts like museums and exhibitions, even when done for a corporate client.

Futurists also have their more corporate equivalent. The Institute for the Future was set up in Connecticut in 1968 by former RAND employees and

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42 Mapping the Future with futurist Richard Watson, eatbigfish event, August 2017, www.youtube.com/watch?v=Aj6suRgTcdc
today is based in Palo Alto in the heart of Silicon Valley. It acts as a think tank for hire and uses forecasting methods it has developed and trains people to use.

Whether hiring a futurist is fundamentally different to hiring a management consultant or a designer may come down to personal relationship building more than the work done. Chances are a futurist may stay at a strategic enough level that a business can choose how to act on their insights. As Stephen Wunker illustrated in Forbes in 2016:43

[...] if companies don’t change the way they operate, bringing on futurists will all be for naught. The futurists’ insights will get lost, and their tenures will be short. It doesn’t have to play out that way, though. [...] organizations can make sure that the trends that they uncover turn into promising innovations rather than presentation handouts that sit around collecting dust.

INTERVIEW: CHANGEIST

Changeist is a consultancy based in Amsterdam and led by Scott Smith and Susan Cox-Smith. They were asked about their career as futurists working with clients on innovation projects.

Have you noticed any particular trends, working with your clients?

No one is interested in measuring innovation. There is also a quarantining of innovation that has happened, because innovation is seen as a distraction to a business. It’s important that the risks of distraction are kept to a minimum. After all innovation is perceived as something to do with freedom. Having the freedom to create can be interpreted by corporations in terms of team makeup and space. There is something of a perceived alchemy in coming up with new ideas. There is also an anti-disciplinarity that is inherited by the likes of Xerox Parc. It’s not about the end goal, it’s about the conditions and the experience of trying to come up with something. Open plan offices, for example, act as a proxy to freedom no matter how they actually perform.

What power dynamics have you seen in innovation activities?

There is an inherit elitism to innovation work as it’s hardly a democratized activity. Everyone has to agree that it takes place, but not everyone gets to participate.

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43Why Companies Need Corporate Futurists But Will Fire Them Anyway, S. Wunker, D. FArber, Forbes, April 2016, www.forbes.com/sites/stephenwunker/2016/04/12/why-companies-need-corporate-futurists-but-will-fire-them-anyway/#4bf7005568ab (accessed May 2020)
Innovation is also sometimes used as a human resources tool, helping identify outliers or future leaders in a team. If there is a culture of innovation, then it may mean that there are many cultures, just like countries. As an industry, we haven’t examined this yet, the monoculture of innovation. There may be local interpretations of what this process of “newness” is. There is also a risk that innovation is used as a form of pacification of staff members who might be feeling a little angsty about their place in a business. It also becomes part of tried and tested attitudes that people feel comfortable with. Some people refer to brainstorming sessions as “nap time,” because everyone knows what to do. There is also the productization of empathy, hidden behind “user-centered design” practices. No team can ever be inclusive or diverse enough, better ideas that work for a larger range of people should be the baseline but it often isn’t. We have to move from a “how might we” to “how might we not.”

Attending conferences

In its simplest expression, innovation work can be defined as a person or a group that has access to enough internal information about a business combined with wider industry knowledge. The combination of these two areas of knowledge may lead to the expression of ideas that, well nurtured, can turn into realistic business opportunities.

Industry-wide knowledge is more difficult to obtain with only desk research or relying on consultants. The element of surprise and serendipity is what conferences can bring. The divergent thinking that eventually leads to convergence is created when someone is placed in a different context to their own. Of course people attend conferences for different reasons. Whether that’s to catch up with former colleagues now working for the competition, or finding out what the direct competitors are doing at the networking drinks, it’s easy to stay within an informational comfort zone. A conference also has the potential to place the problem at hand under a different light.

Due to COVID-19, many conferences moved online but the opportunity is still the same. Instead of thinking “will this be relevant,” an alarm bell should be whether the program is entirely expected and feels unchallenging. The content might be of interest but won’t push someone to redefine the problem they’re working on or think differently about it.

It’s impossible to name conferences worth attending for every type of sector, but it’s worth remembering that by going to events that seem unorthodox, they’re likely to introduce some divergence just by virtue of their format. This can be as much about setting, format of sessions, or topics covered. By attending events that feel comfortable, there’s more temptation to get distracted with what’s happening back at the office, which would waste the
opportunity. Here are examples of conference formats old and new which could make most corporate teams excited about attending an external event:

**OffGrid Sessions** is a yearly conference on the island of Osea in the United Kingdom. The tides mean it's cut off from traffic for most of the day, forcing a deeper engagement and a stay overnight for attendees.

**The Do Lectures** is held in Wales and involves camping and listening to talks in yurts. Possibly inspired by publisher Tim O'Reilly's Foo Camp invite-only events in California, the Do Lectures also have limited attendance and a very wide array of well-known and inspirational speakers. The Do Lectures have been organized by David and Clare Hieatt, founders of Hiut Denim Company which they started after selling their first fashion business, Howies, to Timberland in 2006.

**Doors of Perception** was a design conference between 2000 and 2008 run by John Thackara, author and consultant to many businesses and governments. Events took place over more than a week, an unusually long format for most events. The conference included a choice of multiday workshops, engagement with cultural institutions nearby, and a more traditional conference track.

**The Salzburg Global Seminars** uses a similar format. The organizers work with corporate sponsors to set a topic of discussion; they then select and invite leading practitioners to attend a five-day retreat to explore the chosen topic. Attendees are put into groups which write up their conversations and conclusions by the end of the week.

Some events are more extreme and sell tickets for vacation-like experiences around the world. **Voyagers.io** was co-founded by David Rowan, former editor of Condé Nast's *Wired UK*, a technology-focused magazine. Themes for each of their “adventures” include food, health, and climate.

Add to that the glut of unconferences, meetups, salons, and every other format there is, an innovation practitioner could be pretty busy all year long with divergent thinking. Finding the divergent event opportunities is also a challenge, and sadly there are few services available to automate this curatorial exercise—Lanyrd, a digital service (now defunct), helped people see which events their social media followers were attending.
Then, there’s the challenge of adequately documenting an attendee’s experience to share with the team. Slideshow presentations are sometimes shared by event organizers, but the connections made and new ideas that emerge also need to be jotted down and made sense of after the fact.

This is one of the biggest challenges of attending conferences and other professional events. The more exotic their setting, the more likely details will be forgotten on the way back home. This is similar to the “doorway effect,” a psychological reaction to stepping through doorways and forgetting what you went to the kitchen for. If someone doesn’t document their thoughts on site at the conference, they’re likely to have trouble recalling them several days later. After all, an event is made up of more than just people to meet and presentations to listen to. Divergent thinking is probably also taking place but needs to be captured quickly.

Note-taking

This is where those with a fine arts education have an advantage. Creative note-taking in a sketchbook is taught in art school but less so elsewhere, especially with the advent of laptops. The advantages of sketchbooks are to enable note-taking on the go, in the middle of a round table or a conference where mobile or laptop note-taking is less practical and audio recordings would be ineffective.

Keeping a sketchbook isn’t just about sketching but taking notes in a way to deepen the learning experience of being in a conference setting. Research done at Princeton University in 2014 proves that writing instead of typing notes deepens a learning experience as someone is then able to reframe what they’re hearing and interpret it for their own purposes. This is important to make the most of a conference experience and how it is then communicated back to colleagues. The Sketchbook Project may provide inspiration for different approaches to both note-taking and doodling. Neither of these should be considered a waste of time, as they allow different cognitive functions to impact recollection. A sketchbook doesn’t have to be exhibition-worthy, but at least readable later (this applies to digital tablets and pens too).

44 Walking through doorways causes forgetting: Environmental integration, Radvansky, Gabriel & Tamplin, Andrea & Krawietz, Sabine., Psychonomic bulletin & review (Vol. 17) 2010, p.900-4
45 Mueller, Pam A., and Daniel M. Oppenheimer. “The Pen Is Mightier Than the Keyboard: Advantages of Longhand Over Laptop Note Taking.” Psychological Science 25, no. 6 (June 2014): 1159–68
46 The Sketchbook Project, www.sketchbookproject.com/ (accessed May 2020)
47 Boggs, J. B., Cohen, J. L., & Marchand, G. C. (2017). The Effects of Doodling on Recall Ability. Psychological Thought, 10(1), 206-216
Other forms of note-taking are also useful, especially with so many ways to record conversations on the go with our mobile phones. The classic “walk-through” using a mobile phone camera might help someone capture their thoughts while visiting an exhibit. As long as these are well planned, they’ll be easy to share with everyone after the fact.

**Brown bag lunches**

Corporations also host their own events, bringing interesting people to deliver keynote speeches or take part in panel discussions. This has the advantage of exposing a larger number of employees to information and sectors outside of the company’s own and not rely on note-taking and reflections from a single person. This also means being less involved with that guest than working with consultants, and interesting divergent ideas and concepts are presented without having to actually adapt to them or think about them too deeply. This format isn’t useless per se, but it is information as entertainment as talks are often delivered to a largely passive audience seated in a room or lecture theater. There is a gamble that people attending won’t know how to think of what’s being presented to them unless it’s specifically framed for their internal purposes.

An example of this is former Apple Fellow Alan Kay organizing “forums” for staff in the Los Angeles office. These were recorded and started in 1993 with Neil Postman, a technology critic, philosophy professor, and author of the seminal 1985 book *Amusing Ourselves to Death*. Judging by the subsequent work at Apple, it’s hard to see how Postman’s critical approach would have made a dent in the technology-driven company. But that’s precisely the point of information as entertainment. If the audience had taken what Postman described seriously, this would probably have led to a crisis of conscience and more than a few resignations. History doesn’t tell us whether this happened, but it’s unlikely. Listening to divergent ideas without being forced into what is known as “active listening” (i.e., without any other distractions and in an intimate context where you feel socially obligated to engage) is unlikely to lead to strong memories and therefore knowledge building.

So lectures, when offered in very large groups, are broadly there to expose staff to an external opinion but rarely turn into an internal possibility. They are another form of sales pitch for that external expert, disguised as a learning opportunity. And everyone present probably knows it.

48 Neil Postman talk at Apple 28th July 1993, YouTube, https://youtu.be/QqxgCoHv_aE (accessed in May 2020)
49 Listening to remember: Active sensory listening, M. Sugai, The Global Listening Centre, www.globallisteningcentre.org/listening-to-remember-active-sensory-listening/ (accessed May 2020)
The timing of these talks is also important to consider. It also acts as a signal to employees.

A lunchtime lecture takes up precious downtime away from an employee with family duties. Because it’s during lunch, this also indicates that the lecture isn’t critical enough to interrupt actual work. This gives employees a choice of abstaining.

Just like the quality of the canteen can create a communal experience, active listening in a small group to an expert with different views that leads to a group discussion can have a positive impact because of the invisible network between people that is built. But these conditions need to be met to make sure it’s not “in one ear, out the other.”