

GIJS VAN WULFEN



ONLINE

PRACTICAL METHODS, TECHNIQUES AND TOOLS TO KICK-START YOU 100% ONLINE

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and Rody Vonk**

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ONLINE INNOVATION
PRACTICAL METHODS,
TECHNIQUES AND
TOOLS TO KICK-START
YOU 100% ONLINE

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ONLINE INNOVATION PRACTICAL METHODS, TECHNIQUES AND TOOLS TO KICK-START YOU 100% ONLINE

GIJS VAN WULFEN

BIS PUBLISHERS



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ONLINE INNOVATION

If you would have asked me at the beginning of 2020 whether you could effectively innovate 100% online, I would have said, 'NO WAY!' And now I know I was so wrong. Yes, you can innovate your organisation 100% online. You can devise new products, services, experiences, processes, and business models without any doubt. Since 2020 we, and many others with us, have proven this in practice.

Of course, it was quite a struggle to bring our FORTH innovation methodology 100% online, after its being employed as a 'best practice' for initiating innovation offline for 15 years. We made all the beginner mistakes ourselves. We copied the methodology one-on-one from offline to online with eight-hour workshops a day, which was utterly boring. We experimented with online tools, which in those days, could not handle 25 people brain dumping their ideas simultaneously on the digital collaboration board. Everyone's screen froze, and we had to break away from the online brainstorm. And most of us were untrained in handling those online tools, so each time, the plenary session had to be stopped to explain again 'how to vote', for example, on the digital collaboration board. We had a steep learning curve and managed to work out an inspiring online process for the FORTH innovation method, which delivers great results when working remotely.

For almost all organisations, the transition to remote work in 2020 and 2021 was a restrictive work-from-home one that they hadn't been planning to do. They didn't have the communication or collaboration policies, the online tools, nor a working-online culture in place. All at a time when innovation was needed more than ever to deal with completely new market circumstances. As we saw people struggle, making the common mistakes we did too, we decided to write this practical book to guide people to become great online innovators.

ONLINE INNOVATION inspires you with effective online collaboration tools, techniques, methods, and rules to kick-start yourself to innovate your work and your organisation completely online. That's why this is a practical 'HOW-INNOVATE-ONLINE' book. After describing ten common pitfalls, we share some great tools and techniques that work in practice. We discuss the 'Achilles' heel' of innovating online and present you ten methodologies you can use for online innovation in a hands-on way. The Lightning Decision Jam, the Design Sprint, and the FORTH innovation method will be highlighted, and we work out a hybrid version of this methodology. At the end of the book, you find a systematic description of twenty-five tools and ten methods to get a clear overview at a glance to help you pick the right ones for your online innovation journey.

We hope that this book is a support for you as a consultant, coach, facilitator, manager, or student in the field of design (thinking) and innovation. We are sure that innovating online is here to stay. We see a huge increase in hybrid innovation projects, combining offline and online workshops – using all the online advantages while being personally engaged offline.

Next, there are a few people I'd like to thank specifically: my excellent online-skilled co-authors Maria Vittoria Colucci, Andrew Constable, Florian Hameister, and Rody Vonk, without whom I could never have published this book; designer Frederik de Wal for co-creating another book with me in a wonderful style; text editor John Loughlin; and publisher Bionda Dias for her support making ONLINE INNOVATION a reality.

Let's innovate online!

Gijs van Wulfen



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CHAPTER 6



TEN RULES FOR ONLINE INNOVATION

Working remotely, you encounter advantages and pitfalls. Some people love working online for its freedom, flexibility, and productivity, while others hate it because they miss social interaction, struggle with new tools, and become exhausted by the virtual experience.

To be sure, moving from in-person to online workshops is one of those dramatic shifts that you only experience every once in a while. The two primary questions are:

What do you need to help people change the way they do things?

How can you be more effective when starting online innovation?

CONSIDER BOTH THE RATIONAL AND THE EMOTIONAL SIDE

We like to use the metaphor that appeared in *Switch*^[1], a book about change:

Imagine a person riding a six-ton elephant who wants to lead it to a lovely lake. He manages to guide it thanks to his intention, abilities, and strong control. Indeed, the elephant walks reliably, up to a certain point. After a while, he is tired and does not know how much further he has to walk and whether he will get there before nightfall. Moreover, a series of tree trunks on the path make it necessary for him to exert a tremendous effort to proceed; in short, he no longer wants to continue. So, even if you've never ridden an elephant, you can still imagine how things will end if the elephant doesn't want to move. Now let's find out who these two characters are: the rider is our rational mind, the one that expresses willpower, makes plans, defines actions for change, analyses data, and makes conclusions, while the elephant is the emotional mind, the one that maintains energy, intuition, enthusiasm, fear, sadness, and all our other emotions.

This story tells us that there are three conditions to facilitate any change:

Motivate the elephant: engage the emotional part so that it puts all its energy into motion and works alongside us.

Direct the rider: indicate the direction and support the rational element to take action.

Shape the path: remove obstacles from the environment.

Why do we love this metaphor? Going online needs a shift in mindset. We have suddenly found ourselves to be beginners again despite our long experience. The perimeter, and therefore, the circumstances are entirely diverse.

RULES MAKE THE JOURNEY SIMPLE

The ten rules we describe in this chapter will help you engage the emotional side online, set a clear direction online, and shape the online environment to obtain a seamless online innovation journey.

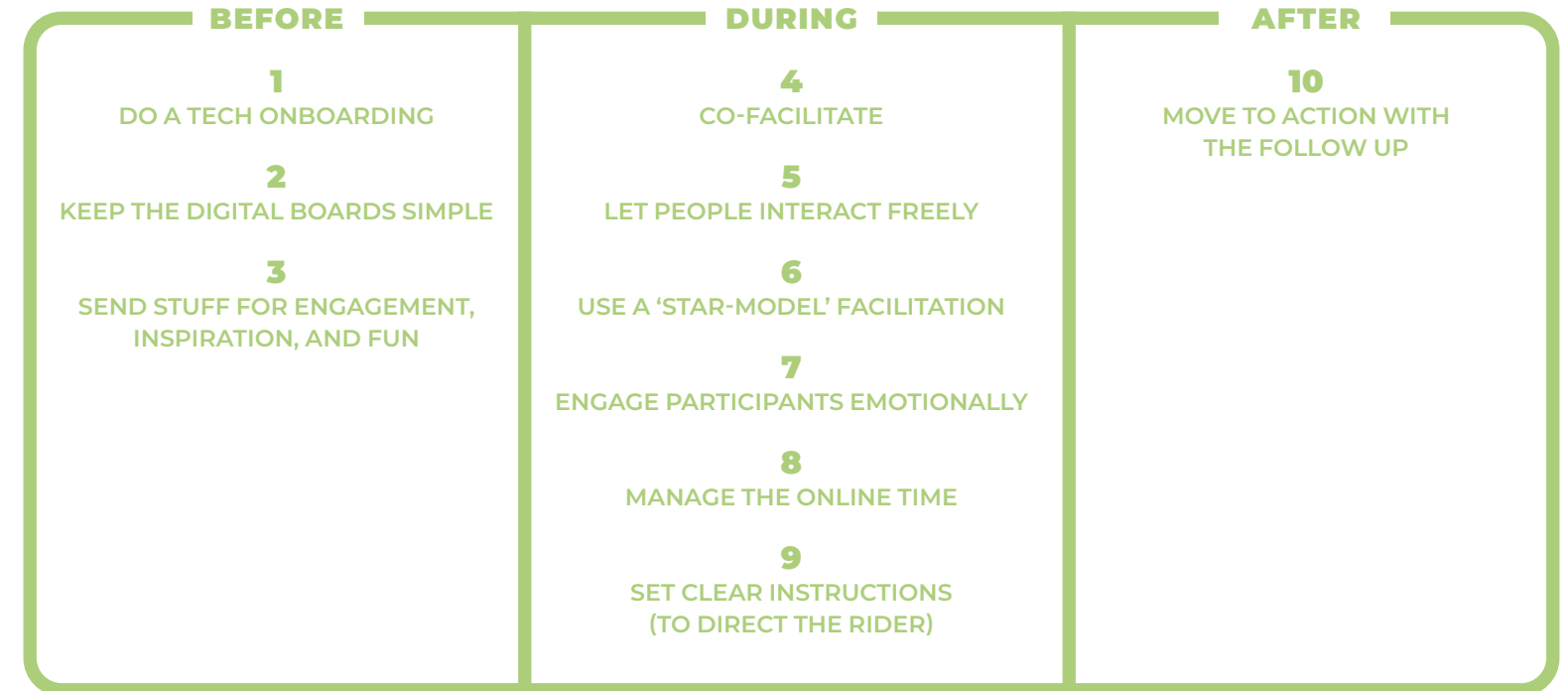
We've chosen the following ten rules out of dozens we've tested based on their effect on the online innovation process.

They result from our online experience and many mistakes, but mistakes are part of life, aren't they? And this is how we learn.

You'll find the ten rules in a logical order of before, during, and after your innovation workshops or journey.

Start applying the ones you feel are the most suitable for your situation and challenge.

CHART RULES BEFORE, DURING, AND AFTER YOUR INNOVATION WORKSHOPS OR JOURNEY



BEFORE

The online preparation phase aims to create all the enabling conditions in your technical set up, effective planning, and knowledge. Online workshops require more careful preparation than in-person ones because there are so many more issues that can jeopardize your workshop's success.

1. Do a tech onboarding

Depending on whether you are using a methodology that is applied in a three-hour workshop or during a 12-weeks series, the onboarding workshop can be longer or shorter, from ten minutes before the workshop starts, up to one hour, or two or three days before the beginning of your online innovation project.

Why? To ensure that the participants know the tools so they may be fully involved in the workshop and that participants' unexpected tech issues won't slow down your workshop.

Online workshops are significantly more reliant on technology than in-person. Technology-issues can have a ripple effect on your innovation journey.

Even if you are only using a video conferencing tool, there are several audio, video, and connection issues you may encounter when facilitating. The question is not if they will happen, but which ones and to what extent. So, when facilitating online, you need to be prepared for these types of issues and have a plan in mind in case they happen.

Send the participants all the information they need, both in terms of hardware, log-ins, sign-up pages, links, and tips, and then check synchronously. In our experience, the four main things to check are:

Connection, of course. A high-speed connection allows participants to have the video on and use collaboration tools. Otherwise, you will have 'variable-geometry' workshops with people coming in and out. There are ways to increase bandwidth to suggest to your participants before the workshop: check the router's location because it can encounter interferences like other wireless devices or obstructions like doors and walls, reboot it before starting and shut down background apps that are consuming bandwidth. A quick solution to suggest is to set the mobile phone to a data network for the videoconference tool and the computer uses wifi to access the collaboration board, to free up the bandwidth. If you have the possibility, use a cable connection because wired connections have better internet speed than wireless ones.

Audio and video. Do a quick check to make sure everyone can be seen and heard clearly. Interacting with impassive or live-but-soundless pictures hinders engagement. Again, use mobile phones for videoconferencing and computers with wifi for collaboration boards, or you can use computers for video and phone for audio to increase your audio quality.

Browser. Some browsers match better with specific tools, for example Chrome for Miro, Mozilla for Jitsy. Also, check that everybody has updated the browser to the latest version. Check it before the workshop rather than in the middle of the process when someone says, 'Help! My board is frozen. I can't move anything anymore.' In some cases, participants will have to download it on the spot, so consider the time needed.

Participant's experience. The tools-ability level of your participants may vary. Check the people's practice with it on some basic features you will use:

1. Raise a virtual hand, chat writing, screen sharing on videoconferencing.
2. Effectively navigate and use the essential features on a digital collaboration board.
3. Let them experiment how to switch from videoconferencing to the board, as you will probably do so often during your workshop. These checks will allow you to redesign some of the interaction forms or, if you do this just before the workshop, to quickly switch to more straightforward ways.

Plan at least a twenty-minute buffer in each workshop for tech-reasons. Prepare an alternative plan, tech-wise, and be sure you have agreed beforehand with your stakeholders what to do if you can't solve the technical problem.

TIP
Do a trial run with colleagues or friends to get an idea of the whole experience.

2. Keep the digital boards simple

Environment shapes behaviours. So, create an environment that helps participants have a pleasant online journey. Remove frictions and set up tasks in the simplest way possible. Digital collaboration boards are one of the main tools in online innovation for solving problems and generating ideas. Everyone needs to be able to work on them quickly and be productive.

However, working on online collaboration boards is potentially more difficult for many reasons. If you don't have two screens, you have to continually change your view, from the Zoom or whatever videoconference tool you are using to the board to read the instructions and do the assignments. To

follow the process and work on a board, you have to zoom in and zoom out all the time, which is fatiguing for your eyes. Finally, the risk of miscommunication is higher in online processes because there are fewer opportunities to ask questions.

Keeping a digital board simple means essentially to care about three aspects: design, activities, and instructions.

Design. For beginners, the route of the process should be straightforward and intuitive. Design your board in a compact working space, limit it to what is necessary, and make sure that people move around as little as possible. Define a logical flow, for example from left to right and from top to bottom, so that participants can predict where the next step will be without feeling 'lost in space' on the board. Display the different workshop steps on the board, separated into boxes, since they are on the agenda you sent in advance. If people have to brainstorm, set up a dedicated working space for each person so that while they are writing post-its, they don't overlap with each other. When you divide people into breakout rooms, prepare in advance the board work areas: write the group's number or nickname and insert the participants' names and photos.

Activities. Start with simple tasks that require minimal actions from the participants, for example drag and drop items that you have already placed on the boards. When they become more confident, you can ask them for more complex actions. If participants need to upload files, consider having them sent to you via chat or even by email, if that is easier for them, so that you can upload them. Set up all the elements needed for the task: post-its, grids, kanban, and mind maps, so that people do not have to copy or duplicate them.



Instructions. Write instructions in a simple way next to the space to be used by the participants; if you have many groups working simultaneously, copy the instructions next to each workspace. In the instructions, especially if asynchronous work is required, you should always write and show information visually.

WHAT – e.g. Find the space with your name and photo. Write down as many ideas as you can think of related to the problem statement.

HOW – e.g. Select the arrow on the toolbar to the left of the screen to write on a post-it.

WHEN – e.g. Ten minutes. You can use the boards' timer to make time apparent to everyone.

The board's design defines the *modus operandi* with your users and can determine whether or not a workshop is useful. Spend some time on this phase; three or four hours to set up a board for a workshop that lasts two hours is not too long, especially if you are a beginner. You can design templates and then improve and adapt them from time to time.

After a while, you will be impressed by your design power and take on more challenges. The leading collaboration tools have ready-made templates that you can import or take inspiration from; a smart tool is Boardle, with which you can find templates divided by workshop type.

TIP

Set the 'board's start view for newly invited members' whenever possible so that your participants won't get lost on the board at the beginning. Block all elements on the board – boxes, graphics, instructions – to keep the layout as you imagined it.

3. Send stuff for engagement, inspiration, and fun

What is the thing we most suffer from having been catapulted into an online life? The lack of in-person relationships, of course. And the second one? Second is the lack of tactile experience: the objects we used during our workshops, markers, papers to hang on the walls, billions of post-it notes, and artefacts of various kinds. Nostalgia aside, objects serve to inspire, develop creativity, give a sense of solidity, and feel a 'real' connection to what we are doing.

Touch, taste, and smell are the senses that are missing in the online world.

Especially if you are about to embark on a long innovation journey, you can send participants at the beginning of the trip a physical toolbox. It will be a pleasant surprise, an act of care, and a call to concreteness.

To inspire you, below are some ideas for composing your five senses toolbox (more on this in Chapter 5) to send before kickoff. It will make participants feel like they are present in the room by sharing a concrete 'live' experience. Ensure the objects activate all five senses, take care of the packaging and enclose an intriguing note. Use the common unwrapping moment together in the kickoff to present each step of the route!

CHART: HOW TO COMPOSE A 5 SENSES TOOLBOX

A wellness kit (scented candles, bath salts, room aromas, oils, soaps).

A book connected to the methodology you use, or this one ;-).

A novel related to the places, the environment, the trip or simply that has inspired you and you want to share. We like Raymond Queneau's novel, *Exercises in Style* – the same story retold in 99 different ways to look at things from different perspectives.

Posters with canvas templates to use in asynchronous work: the FORTH innovation map, the Lean Canvas, the Business Model Canvas.

One whiteboard for creative activity or a prototype.

Card decks to use during icebreaking or creative tasks, for example, Dixit^[2], Method cards^[3], or Superpower cards^[4].

Objects to use during tasks for inspiration: an innovative object, the storyteller cubes.

Gadgets: an hourglass to measure time as the ancients used to do, a magnifying glass to observe reality better.

A notebook, a bullet journal with pencils, stickers and washi tape for artistic notes.

Delicatessen for the palate's joy, a sweet and savoury mix representing your land or something related to the company or the route.

TIP
Send your box in time to the various destinations to ensure that everyone has received it before the kickoff and can participate in the magical unwrapping moment.



DURING

These rules serve to immerse participants in an online environment where they can feel at ease, share, generate ideas, co-create, and enjoy a seamless experience to the fullest.

4. Co-facilitate

No matter how much of a tech lover, expert, or nerd you are, running a remote workshop is a hard job. Therefore, we recommend always having a second person facilitating the workshop to help you with the technical issues. In this way, one of the facilitators can focus on the process, looking at the participants' more or less weak signals, and decide if there is something that needs to change.

We have experimented a lot with both. It's not impossible to run an online workshop on your own, even for groups of 20 people; it's just that a large part of your attention will be on making sure the flow is smooth from a technological point of view. You'll have to answer all the questions on how to use the tools. Plus, any technical problems with one of the participants will stop the flow of the workshop.

A tech facilitator is a person who also knows the process and can identify alternative solutions on the spot to guarantee results at any stage of the process. Here is a checklist of the primary tech facilitator's activities. The important thing is that you have rehearsed the flow first and have agreed on an effective way of dealing with each other during the workshop and how to deal with the most common contingencies. Watch out. Even tech facilitators may also suddenly disappear from the workshop; make sure they have a wired connection and be prepared.

TIP

If you can't have technical support, you might get light help from one or two persons in the group that helps keep things running smoothly and improve team cohesiveness and engagement. The activities you can assign to them are to chat check, set times, and support the less experienced participants in using the tools.

CHART: TECH FACILITATOR ACTIVITIES CHECKLIST

BEFORE	
1.	Supports the facilitator in preparing the boards and other necessary tools like polls and surveys.
2.	Facilitates the tech check.
3.	Sends an email to the participants explaining the facilitator's role.
DURING	
1.	At the beginning of the workshop, explains how video conferencing works and how to use chat, reactions, and polls.
2.	Checks that people are on mute and, if necessary, puts them on mute.
3.	Asks people to unmute, if necessary.
4.	Reads the chat continuously to see if there are any requests or difficulties.

5.	Makes links and other resources available to the participants via the chat.
6.	Shares the screen to show slides, boards, or other tools.
7.	Sets music if scheduled when people are working in together-alone mode, after checking that nobody gets disturbed by the music.
8.	Sets the timer for activities.
9.	Manages icebreakers and some of the energizers.
10.	Imports documents to be entered by participants if they fail to do so themselves.
11.	If needed, prepares and launches voting workshops and supports people voting and shows the results.
12.	Can write post-it notes for participants to make the flow smoother.
13.	When using break out rooms, prepares and activates the BORs, checks that everyone is in, supports people, sends broadcast messages, warns five minutes before closing them, and checks everyone has logged in. And during BORs, the tech facilitator monitors that people are able to work with the tools.
14.	Sets up the boards after the exercises.
AFTER	
1.	Updates the boards with new tasks.
2.	Supports people in asynchronous work.
3.	Sends materials after the workshop.

5. Let people interact freely

Innovation is a co-creation process for which people have to interact, confront each other, generate ideas, test solutions, and define actions together. Compared to in-person workshops, it is more critical to change settings in online innovation processes because, in the plenary, the interaction is regulated in a very structured way to not slide into delirium. People are sitting in front of a screen and, depending on the tool you use, they may or may not see each other, there is little movement, no informal communication, it's challenging to wink at your neighbour without being seen by everyone, and the idea of always being on stage, even if you are participating in a meeting are all very relevant. That's why Rule 5 is to recreate differentiated online settings to allow people to interact freely in small groups. You can do this with break out rooms, virtual rooms where you can split your group into subgroups.

What can people do in BORs?

- ▶ Look each other in the face.
- ▶ Interact informally.
- ▶ Explain their doubts.
- ▶ Come up with crazy ideas.
- ▶ Collaborate synchronously on a tool.
- ▶ Laugh.
- ▶ Comment on one's personal environment.

In particular, this is a chance for introverts to have their say and for people from more and less disciplined cultures to interact together.

You can find this feature in Zoom, which was the first to implement it successfully and, in our experience, the easiest and most flexible way. From early 2021 it has also been possible in Microsoft Teams and Butter. You can find an overview of these tools in Chapter 12. We recommend choosing tools that

offer the BOR option in an online innovation process. If your group is bigger than eight people, in a two-hour workshop, you have to foresee at least one moment of free interaction in a BOR. When people don't know each other, always provide break out rooms of two in a moment during the workshop because it allows everybody to interact in the workshop.

In the online tools, you can set a casual mode that randomly puts people in the BOR or can define how to divide people into subgroups. And with most of the tools, you can prepare the rooms in advance. You can use the random option for a big group in which people do not know each other and you want to allow a more personal exchange, in pairs or triplets. Homogeneous groups allow people to have more confidence and interact. However, to have different perspectives, new ideas and contamination, you have to mix all these elements and make heterogeneous groups by hierarchical level, functions, technical skills, and nationality.

How long in the BORs?

It may seem like magic to you to make five, ten, or twenty groups with a simple click and with the same ease to make them return to the plenary sitting, avoiding scanning names, repeating them, going around the groups, and calling everyone back. These actions are more or less time consuming depending on the level of tech savoir and discipline of the group. However, the process is less fluid than in-person: people find themselves thrown into a virtual space without the reference group and facilitator. So, start with simple tasks and little time, three to four minutes. To continue, make sure people have time to interact, even in a less structured way. In the following table, we have indicated the time intervals needed to interact effectively in the BOR, based on our experience. The actual time planned depends on the topic and task you assign and how clear, simple, and structured it is.

Number of people Per BOR	Times (In minutes)
2 to 3	From 3 to 10
4 to 5	From 5 to 15
6 to 8	From 10 to 20
9 to 10	From 15 to 25

With groups of more than four people, define a moderator per group to keep time and structure and report on the group's results when needed.

TIP

Have the BORs scheme ready during the workshop and prepare the first set in advance. Use broadcast messages to give necessary timing or instructions, go around the rooms to facilitate the work.

6. Use a 'star-model' facilitation

Even if you have extended experience as a facilitator of in-person innovation processes, you should rethink your facilitation style to be effective online.

Why?

Silence with people looking at the screen can become awkward and immediately divert attention to the reality in which people find themselves. There can also be audio delays causing overlapping speech. Suppose people talk freely with all microphones on. In that case, it creates much confusion

and a disturbing environment, with the unwanted side-effect that introverts may never find their space to contribute if nobody gives them the floor.

What is star model facilitation about?

It means a centralized model in which interactions among people in the group are mainly the moderator's responsibility. As a facilitator, you have to 'direct' communications to create a smooth and equally clear and neat flow.

What are the best practices for doing this online?

Turn-taking – the facilitator calls the participants one at a time, avoiding overlapping. This is not saying that you should ban online horizontal conversations. Instead, it would be best if you facilitated discussions between participants to make them smoother. For example, you can ask one person in the group to answer a question or stimulate a comment by taking over the process.

Use (also) non-verbal methods of communication – In this way, there can be many questions and comments among the group and the facilitator will decide what to bring to every-one's attention.

Ask for frequent feedback – This is one method that works best online and allows you to get ideas, reactions, and moods quickly. Use quick polls and surveys to promptly and efficiently collect group feedback.

TIP

During the workshop, especially if you are using a together-alone technique, which we discuss in chapter 4, keep the board chat open to facilitate non-verbal interaction without going to the video conference chat. Have a list of people's names available, since you may not have all of them visible on the screen.

7. Engage participants emotionally

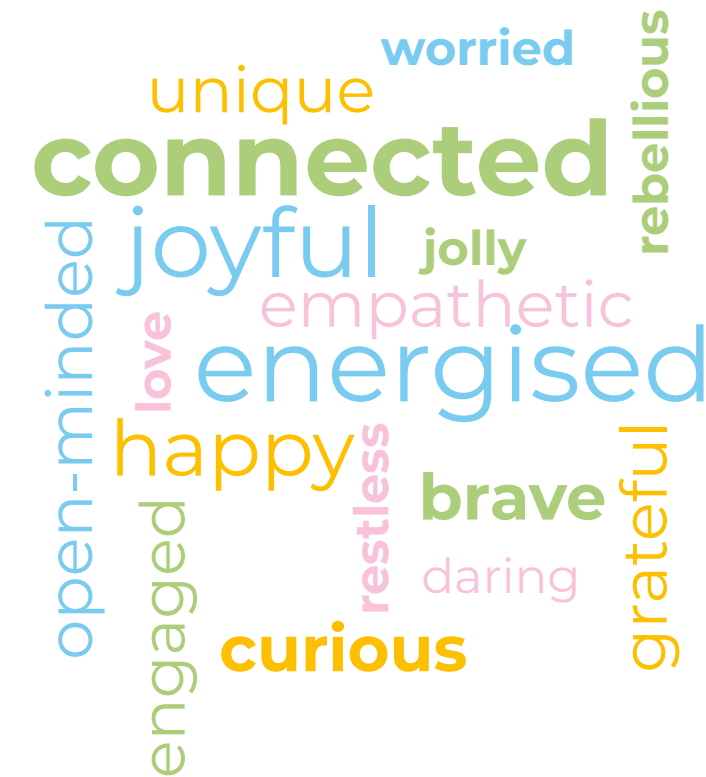
An innovative mindset grows according to the team members' focus and energy. Without feeling emotions, there's no energy for change and innovation. Engaging online is more difficult because people don't breathe the same atmosphere, never entirely in the same setting, as would be the case with in-person workshops. Zoom fatigue is also a real phenomenon – as we discussed in Chapter 1 – linked to the difficulty of accessing non-verbal language, which causes stress in our brains. People are engaging in multitasking activities, checking emails or chat, and being distracted by their environment, as you read in the previous chapter. It's easy to get overwhelmed by online tasks and tools, switching from videoconferencing to other tools, and back again.

How can you facilitate emotions supporting your change and motivate 'the elephant' to focus its energy on the target?

Allow participants to share their feelings

There are several ways to facilitate the emotional experience. When you use a methodology, which lasts only a few hours, a short moment of sharing 'how do you feel' can be enough. You could ask to share an emoji on the video chat or share it

on a simple mood board on your digital collaboration board. If you are using a longer methodology, we recommend spending more time to enable conversations about emotions and give them their rightful place in an innovation journey. Use different tools to collect feedback in real-time, for example, a quick Mentimeter survey to display answers in fun, visual ways.



Surprise and create a WOW effect – You can do that by creating an immersive and personalized experience, which enhances a sense of belonging. Create an environment that combines functionality and beauty. *Activate the child side, the repository of emotions, through play.* Collaboration boards are a very suitable tool for this purpose, where you can include cartoons, images, and videos, or create virtual rooms with Wonder.me, Spatialchat, or Butter to make people feel connected, as explained in Chapter 4.

Plan moments of informal exchange during the journey – Plan informal moments during which people can talk over coffee or a glass of wine. Get people to drop the cognitive part a bit and engage the body – our emotion detector! Creativity also needs a change of perspective, looking from the outside rather than from the centre, visualizing. In an in-person workshop, the setting changes are also physical, when you move from plenary to small groups, in a horseshoe arrangement or around tables in small groups. This is not the case online where people are sitting or standing but always looking at the screen and not moving. Getting up and moving away from the computer makes everyone feel much more connected and positively affects wellbeing. So, you can ask people to connect by their phones and go for a walk together or ask them to get up from their chairs to pick up objects in the shortest possible time and show them to the group. Use music as a togetherness enabler for energizers and informal moments. When you know each other better, you can even dance altogether.

Video off is not an option when trying to engage people!

TRY IT!

Daisuke Yukita, senior interaction IDEO designer, has created a Remote High Five system^[5].

We've never tried it yet. The author says that it 'tracks the participants' hand positions through the computer's camera and plays clap sounds when your on-screen hand "high fives" someone else's.' He states that Remote High Five is now 'one of the iconic moments of the workshop.' Check out the video on [Vimeo.com](https://www.vimeo.com)
WOW!

TIP

Start with tiny steps: small movements of the face or the head in a mime.

8. Manage the online time

Forget in-person time and enter another dimension.

Why?

In terms of fatigue, one hour in-person feels like two hours online, so our remote workshops need to be shorter. When taking our FORTH innovation methodology online, we learned that eight-hour online workshops were a disaster. Time online waiting to do something is boring and has the immediate effect of getting people into multitasking, reading emails, and typing WhatsApp, or WeChat messages. The initial ten minutes of talking as introduction in an in-person workshop, with everyone together in a room, can be only three minutes maximum online. As people organize back-to-back meetings online, you have to start and finish sharply on-time, and we strongly suggest you schedule the length of your online innovation workshops to a maximum of three hours.

It means that you might have to rethink your innovation process and redesign your workflow to include synchronous and asynchronous activities depending on the tools' objectives, the participants, and their knowledge.

During synchronous online workshops the pace has to be faster because people interact less and multitask much more quickly than in-person. Plan short and frequent activities; four to six exercises can be done in a three-hour workshop, divided into more straightforward five ten-minute steps.

Time is king, and the agenda is the queen, so be accurate to the minute.

In the online agenda, you must also plan slack time for technical issues, difficulties in using tools, and transitions between tools and devices.

As you are dealing with humans, you have to include the unexpected in your agenda. Let's see how. In Rule 1, we said that a buffer of 20 minutes should be left for additional tech issues, let's say ten minutes per hour. In concrete terms, this means putting a few extra minutes for each task on the agenda. If one person fails to complete a task, the workshop slows down for everyone, so include detailed explanations of how to use the tools in your agenda. Switching from one tool to the next, entering and exiting virtual rooms, swiping from a conversation in Zoom to Miro and vice versa, sharing the screen, and even unmuting are all time-consuming activities. Consider these transitions in your schedule as well. In our experience, you need to add three to five minutes to each transition, depending on the participants' experience with the tools and the number of people present. With eight people, three minutes is sufficient, but allow five minutes if you have more than fifteen people in the online workshop.

Have frequent breaks! Take breaks more often than when you do in-person workshops: at least one break every 40 to 60 minutes because the rhythm is tight and people are engaged in short and frequent activities.

Timebox – How often have you heard this word? It gives you an idea of what you have to do to facilitate online. Define timeboxes and get people to move from one to another. Using shared timers that everyone can see is a great resource to keep activities to their planned duration. You can find them on Miro or Mural. When it looks like a hyper-structured

process, reconsider the whole flow in the diary is smoother. An innovation workshop couldn't be only a succession of timeboxed tasks. Check the engagement activities from Rule 5 of this chapter, and see how the magic comes true!

TIP

Put activities on the agenda that you know you can skip without affecting results, because they will also constitute a time buffer.

9. Set clear instructions (to direct the rider)

Do you remember the introduction story? Direct the rider!

To ensure a seamless experience, you need to be clear every step of the way.

Be redundant – Say it, make an example, show it, and repeat and explain how the final output will look. Don't be afraid of over-communication. Write the instructions on the digital collaboration board as well, as explained in Rule 5. *Share your screen* to show the necessary steps online and to avoid questions and interruptions.

Let's take an example of one of the most useful techniques, online voting. It always takes more time than scheduled. After all, it is only a few clicks. As soon as you start voting, people ask you where the 'thumb up' is because they don't see it in the bar at the bottom of the screen. Participants in the online workshop who were not active need to refresh. Someone will vote and close the screen without having clicked the 'done' button. The result is that often at the end of the given time, some have voted, others not. So, share the screen and show all the necessary clicks calmly. You will save a lot of time and frustration on the part of your participants.

Show the outputs – Share the canvasses, the matrixes, and the mind maps you need to use and explain how to do it practically.

- ▶ How do I write on a post-it?
- ▶ How do I copy a link in the chat?
- ▶ How do I add branches to mind maps?

Share the rules – Depending on your workshop, you can either communicate the three essential rules – Video on, mute on, use the chat to communicate – or send a complete document with proper online etiquette. Choose all the options between. We have collected and selected practices from which you can choose. Depending on the countries' culture and organisation you are working with, you can decide how many items to include in your netiquette checklist. We suggest you start with a maximum of six items to avoid the paralyzing effect of receiving a list of 20 rules. Then, if you see that you need more, you can always update your list. Here are some of the items you can have in your online meeting etiquette.

CHART: NETIQUETTE CHECKLIST

1. **Read the agenda and the instructions beforehand and come to the meeting prepared.**
2. **Familiarise yourself with the tools you're going to be using. Have a quick tour of the video chat or online whiteboard tool so you can be productive in the workshop.**
3. **Call in from a quiet, well-lit location.**
4. **Arrive on time, if not a little early, so you can iron out any audio/visual equipment issues before starting.**

5. **Test your audio so you can be heard just after logging in.**
6. **Use a headset or earphones when possible to minimize echo and background noise.**
7. **Turn off notification sounds (also for the facilitator).**
8. **Set microphones to mute when not speaking.**
9. **Shut down other devices taking up bandwidth, if possible, to help ensure a stable connection.**
10. **Turn webcams on whenever possible – it's nice to see your face! Though bear in mind that in low-bandwidth environments turning off the camera can help with call quality!**
11. **Keep the video chat open to interact with people.**
12. **If you participate in the office with your colleagues, be sure that each of you is connected with its PC .**
13. **Use nonverbal means to indicate when you would like to speak, for example raising your hand in your video conferencing software or using built-in hand-up features.**
14. **Respect break time to the minute.**
15. **Be engaged. Listen to whoever is speaking, communicate in the chat channels, and use the online collaboration tools.**
16. **Close extra tabs unless necessary and remove distractions, like email notifications.**
17. **When speaking, do so slowly and clearly. Practice brevity whenever possible.**

18. **During presentations or longer discussions, try to add questions or thoughts to the chat channel and avoid interrupting.**
19. **Please wait for the facilitator to give you the floor; online, it only takes two people overlapping to create confusion.**
20. **Read what's in the chat, so as to not repeat questions.**
21. **Giving feedback, nod and real thumbs up are signs that you are listening!**

Source: Adapted from Workshoplab <https://www.workshoplab.com/blog/online-energizers/#set-good-online-meeting-etiquette>

AFTER

Now that you have done an outstanding workshop, keep up the energy and engagement of your participants and keep the pace up in the next stages!

10 . Move to action with the follow up

An online experience is both short and intensive. What happens after the workshop is just as important as the activities you have done during the workshop. The innovation process cannot end at this stage; you must review the work done, gain more insight, engage people for the asynchronous work between the workshops, and get feedback to improve subsequent experience workshops. Online follow-up is more manageable than in-person because all outputs are available in digital format, which makes further use very easy.

Define virtual spaces to share resources

Whether you are using a short or long process, you need to

follow up to continue the discussion after the meeting is over to bring the action to life. Find channels where you can continue the asynchronous work. These can be a MS Teams channel or the digital boards you have collaborated on or with tools like Padlet and Trello. Share the results and topics for discussion with the participants and share the video recording with those who could not make it to your workshop or other interested relevant stakeholders.

Download or screenshot all significant board outputs and put them in a shared space. Update them on the progress of the asynchronous work, showing screenshots.

Set up the board so that participants can retrace the workshop's flow whenever they return to it.

Be open to having an additional workshop to support people in using the tools. It can be a 45-minute plenary meeting with the whole group or an optional workshop involving only those who feel they need more practice to participate. It will speed up and smoothen your follow-up process.

Keep a virtual water cooler open. A virtual watercooler is a channel where people can stay connected after the end of the project, learn, and have fun. It could be done via a MS Teams channel, or with apps that you can add to your Slack, like Donut, Watercooler, or even a WhatsApp group, as we often do, to make it extremely easy. You just need to provide the space without facilitating it; the more spontaneous, the better.

Use the following chart to keep to the rules that are most important to your innovation process.

CHART: RULES, TECHNIQUES, TOOLS MATRIX

RULE	WHY	WHEN	TECHNIQUE	TOOLS
1. Tech Onboarding workshop.	Because technology can make either your dreams or worst nightmares come true.	Always!	Use the chat function.	All tools used during your workshops
2. Keep the board simple.	To encourage everyone to interact and make the innovation journey seamless.	When people use collaboration boards for the first time.	Design a virtual room. Visualize.	Boardle Klaxoon Miro Mural Trello
3. Send people real-life stuff.	To surprise and create a WOW effect.	At the beginning of the journey.	Wrap it in a charming way!	Post offices and express couriers
4. Don't facilitate it alone.	Because you need to be focused on the process.	Always!	Co-facilitation.	SessionLab Calendly
5. Let people interact freely in small groups online.	To give the opportunity to interact for more introverted participants, and to have more informal conversations.	When the group is bigger than six people.	Break out rooms.	Zoom MS Teams Butter Wonder.me Spatialchat
6. Use a star-model facilitation in plenary settings.	To be more inclusive and to speed the process.	When people don't know each other.	Questionnaires/surveys. Anonymous voting. Bulk mode (in Miro) to generate ideas without distraction.	Klaxoon Miro Mural Tsccheck.In

RULE	WHY	WHEN	TECHNIQUES	TOOLS
7. Engage participants emotionally.	Because emotions enable change and innovation.	When your innovation journey is longer than a three-hour workshop.	Using questionnaires/surveys. Design a Virtual Room. Use Music.	Howspace Wonder.Me Butter Miro Mural Spatial.Chat Spotify
8. Manage time more strictly online.	Because workshops are shorter and you're less flexible.	Always!	Agenda. Working synchronous and asynchronous. Anonymous voting. Use Bulk mode (in Miro) to generate ideas without distraction.	Sessionlab Miro Mural
9. Set clear instructions.	To prevent people from interrupting the workshop with continuous requests.	Especially when people use tools for the first time.	Record videos to explain tasks or to instruct participants.	Loom Toonly SessionLab Speechelo
10. Follow up.	To keep energy and engagement high and move to action.	When you have asynchronous work.	Using questionnaires/surveys. Working synchronous and asynchronous.	Dropbox Google Form Howspace Mentimeter Miro Mural Padlet Slack Trello

KEY MESSAGES FROM THIS CHAPTER

- ▶ **Online innovation is a new process with many potential pitfalls linked to technical issues you often can't control. *Having rules to follow makes the journey more straightforward for you and your participants.***

- ▶ ***In setting your online environment, you need to consider both the rational and the emotional sides to be effective. Because of the lack of social interaction among people, emotional engagement is challenging online, so you need to use the right rules.***

- ▶ ***You cannot control technology, so have a plan b, c, and d.***

- ▶ **You can put each of the rules into practise with different tools and techniques. You can find them in Chapters 3 and 4; *choose the ones you feel most comfortable with.***

- ▶ **To understand which steps are the most critical for you, *you have to experiment.***

- ▶ **There are many ways to co-create online with participants, even if they have few technological skills. *Choose rules that allow you to do it quickly.***

- ▶ ***The simpler, the better* (based on your participants' technological skills and habits). Calibrate the use of technology. The possibilities are endless even in simplicity.**

[1] C. Heat and D. Heat, Switch, how to change things when change is hard, Random House Business Books, GB, 2010

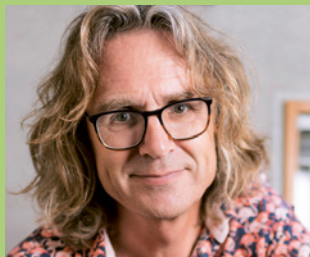
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Gijs (Dutch; 1960) is a worldwide authority in innovation and design thinking. He worked as a marketer in the fast-moving consumer goods industry, and as a strategy consultant before founding the FORTH innovation method in 2005. FORTH is a scientifically proven methodology for the start of innovation, which is implemented on six continents. In 2020 the methodology was taken 100% online with great success.

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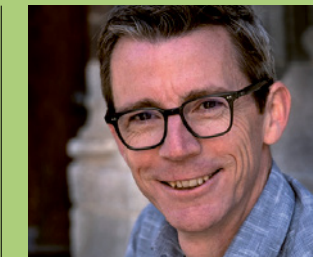


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The training Rody facilitates is characterized by the combination of theory and practical group work. Hands-on activities and group discussion as well as interactive exercises and the application of different tools and techniques blend throughout his sessions.

Over the years he has facilitated face-to-face and online sessions around the globe in countries in Europe, Africa, and the Middle-East for hundreds of people with a great variety of job titles (innovation managers, product owners, board room members, R&D experts etc.) for a wide range of (international operating) organisations and multinationals.

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ONLINE INNOVATION

If you would have asked us at the beginning of 2020 whether you could effectively innovate 100% online, we would have said, 'NO WAY!'. And now we know we were so wrong. Yes, you can innovate your organisation entirely online. You can devise new products, services, experiences, processes, and business models without any doubt. Since 2020, we, and many others with us, have proven this in practice. Innovating online is here to stay.

This book inspires you with effective online collaboration tools, techniques, methods, and rules to kick-start yourself to innovate your work and your organisation completely online. That's why this is a practical 'HOW-INNOVATE-ONLINE' book.

After describing ten common pitfalls, we share some great tools and techniques that work in practice. We discuss the 'Achilles' heel' of innovating online and present ten methodologies you can use for online innovation, hands-on. The Lightning Decision Jam, the Design Sprint, and the FORTH innovation method will be highlighted, and we work out a hybrid version of this methodology. At the end of the book, you will find a systematic description of twenty-five tools and ten methods, clearly and simply, to help you pick the right ones for your online innovation journey.

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