

YES! AND...

THE CREATIVE GORILLA

INNOVATE TO LEARN; DON'T LEARN TO INNOVATE

"THE CREATIVE GORILLA" IS DEDICATED TO JAKE

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An Overview of the Inn8 Approach

"They can put me in a jungle. Still, I can create."

M. F. Husain Indian Painter and Film Director

This Appendix is designed for those who have read the book "The Creative Gorilla - Innovate to Learn, Don't Learn to Innovate". It provides supplementary tools to use in your Inn8 Workshops.

If you have not read the book and you are seeking tools for creative and logical thinking, we recommend you read the book, available on Amazon. For those who have not read "The Creative Gorilla", this is an introduction to the Inn8 Approach.

The Rainforest Metaphor

Few opportunities arise in the sterile atmosphere of a vacuum-sealed bubble, just as life struggles to exist in a desert. Opportunities arise in messy, complex environments, very like a rainforest; lush and teeming with life while often difficult to navigate, uncomfortable and fraught with risk for the people exploiting them. The literal equivalent is the environment in which organisations work today. Whether in times of plenty or recession, opportunities abound if you can sense them. How can you make the most of them? You need a strong approach like the Inn8 Approach.

I call it this because:

- The ability to use innovative thinking in a structured way is innate in all of us
- There is a structure of 8 Stages in the Inn8 Model that I will introduce later.

Layers of the Rainforest

Just as the rainforest has layers, so does the Inn8 Approach. If you cultivate these layers you will exploit your opportunities more effectively; the quality of your solution will be higher, as will the acceptance it receives. If you would like a formula, Effectiveness = Quality of Solution x Acceptance of Solution. These layers are:

Layer 1 - A Structured Model

The Inn8 Model is structured with 8 Stages. It is like a map of the forest, guiding you to your opportunity. It ensures that everybody is working on the same Stage, at the same time and in the same mode of thinking. This may seem obvious but think of how many times you have been in meetings which go in frustrating circles because one group is still generating ideas while

another has started discussing implementation of the first idea. This issue usually stems from people having different styles, something I discuss later in the book. A structured, staged model helps people collaborate and enhances the thinking process.

Layer 2 – An Innovative Climate

By creating the right **macroclimate** in your organisation you enhance creativity and collaboration. You can also use the principles of building the macroclimate to build a sound **microclimate** in meetings.

Layer 3 - A Kit of Logical and Creative Thinking Tools

Using a variety of tools enables you and your team to enhance thinking and maintain interest. The range of tools in the Creative Gorilla book provides a solid toolkit that you can develop.

For more details on Layer 2 & 3, please see the book.

Use a Structured Model

“A diamond is a chunk of coal made good under pressure”

Henry Kissinger Former US Secretary of State

I was browsing in a shopping centre with an airport terminal attached and idly looking at jewellery, fascinated by the diamonds. This made me think of the skill of diamond cutting and how we might use it as a metaphor for using the Inn8 Model.

Though still a skilled craft, diamond cutting is now a highly scientific business, using computers to produce 3D models of a rough diamond and a strategy for cutting. Before computers, cutting was much more of an art, requiring the cutter’s vast experience and skill to obtain the best “cut”. Such a cut makes the most of the rough diamond, increasing the weight and saleability of the finished article and so its value.

To establish the best cut, the diamond cutter would spend a long time thinking, exploring the facts about the rough diamond, its natural shape, its flaws and its colour. Only after the cutter was clear about the facts would he begin to devise the best solution and strategy for cutting and selling the diamond. He would take into account market forces and fashion to ensure that his cut provided the optimal return. He would never start cutting with just a cursory glance and no plan.

Review The Inn8 Model

A Diagram

If you use the Inn8 Model (Figure 1), it will enable you and a team of colleagues to make your rough diamond of an opportunity a gem, provided you give it sufficient time. If you use it regularly (and implement your propositions), it will enable you to exploit opportunities systematically and consistently. The Inn8 Model stems from the Creative Problem Solving (CPS) model that Parnes & Osborne¹ originally developed and that organisations have used for many years. This CPS model has been highly researched and studies (e.g. Basadur²) have shown that use of a systematic approach produces more effective results.

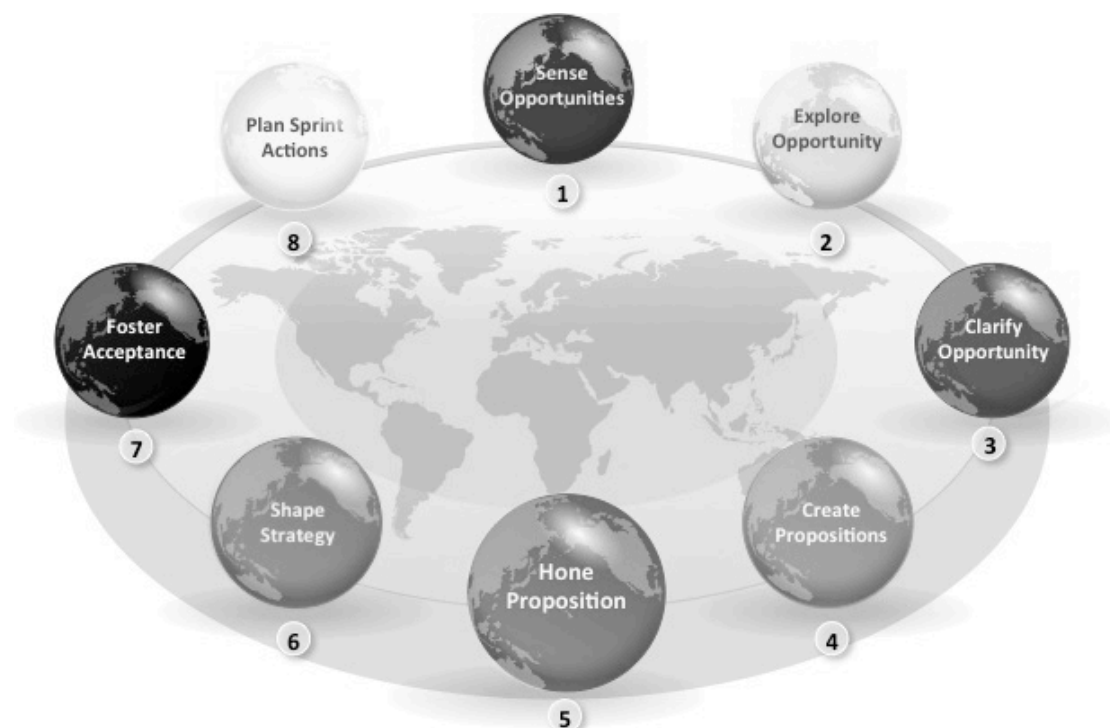


Figure 1 - Inn8 Model Diagram

The circular model implies that the process of innovation is a continuous one. The following are two of the key aspects of the model:

A Model for Innovation

As well as making the most of your opportunities, you can also view the Inn8 Model as a model for innovation. I focus on “opportunities” because “innovation” has become, in the minds of many people, synonymous with products and business models, when in reality there is ample scope to innovate across organisations, in all functions, at all levels.

¹ There are many online sources for this reference. I suggest you Google Parnes Osborne CPS.

² www.basadur.com

Everybody Should Participate in Innovation

In addition, innovation has become a management discipline in its own right and there is a danger that other managers say, “We don’t do innovation; we leave that to the professionals.” Why should the fun of innovating be confined to specific areas of organisations? Every function has opportunities and everybody can be innovative in exploiting them so that they make the most of them.

8 Stages - 3 Steps per Stage

As you saw in Figure 1, there are eight separate Stages in the Inn8 Model. Traditionally, when writing about creative problem solving models, authors say that at each stage there are two distinct steps. The Inn8 Model has three.

The First and Second Step

One step is the **divergent**³ step, when you are encouraged to use creative thinking to broaden your options. The next step is the **convergent** step, when you use structured logical thinking to focus down and make a choice.

However, having used creative tools with groups for nearly twenty years, I have noticed that some of the tools that help you to broaden your options are quite structured and logical (e.g. How Might...? on Page xx) and some of the tools that help you to focus involve creative thinking and intuition (e.g. One Word Story on Page xx). So, to say that you use creative thinking and structured thinking at each stage is true, but the type of thinking does not split perfectly between steps.

What does ring true is that you broaden your options at one step and narrow the options at the next. Hence the globes in the Inn8 Model that represent not just a world of opportunity (to use another metaphor) but also imply the idea of diverging as from the North Pole to the Equator and converging as from the Equator to the South Pole.

Another metaphor you might find helpful, to build on the globe metaphor, is the zoom lens on a camera, zooming out to broaden options and zooming in to narrow down your options.

The Third Step

The globe and the lens are useful metaphors, however, I have also noticed that at each Stage, as well as creating and choosing options you take another step, though it may be implicit. This step is a **decision** that has four choices. Do you:

- Move on to the next Stage?

³ Dr. Liam Hudson coined the terms for two types of reasoning, “Divergent” and “Convergent”, in his book *Contrary Imaginations* (Pelican Books, 1967, Page 49. This is available on Amazon in used format).

- Revert to the previous Stage because of new information that has arisen?
- Pause to gather more information or / and do some more thinking?
- Stop now because the opportunity is not acceptable for some reason?

This “go / no go / pause / iterate” decision is important; **time spent thinking is usually a lot less expensive than time spent implementing**, so make the most of it.

In addition, the ability to kill poor opportunities quickly for good reason will help reduce the number of impractical opportunities that recirculate in organisations, surfacing periodically to waste time and money. Finally, having a clear and documented decision to cull a poor opportunity will help if you have to justify that decision.

In summary, at each Stage you take three steps: **Diverge; Converge; Decide.**

Seeing the Wood From the Trees

What metaphor aligns with this three-step process and the rainforest? A tree. The metaphor of a tree, with three major components: CANOPY, TRUNK and ROOTS. Many gorillas live in rainforests and do climb trees, (though like people not that often) so this metaphor fits well with the Creative Gorilla and rainforest metaphors.

If you climb up into the canopy, you widen your perspective and options, (“broaden your horizons”). When you slide down the trunk, it narrows and focuses your perspective, (“brings you down to earth”). The roots are the foundation of the tree. These form your decision step and you gain depth of understanding at each Stage (“root you in reality”). Sometimes the roots, like your decision making, are visible (explicit) and sometimes they are not (implicit).

A Summary of the Inn8 Model

I summarise here the eight Stages of the Inn8 Model. As you read through Stage 1, please think about a possible opportunity to which you might apply the Model so that the Model becomes of practical use to you, not an abstract theory.

Example Opportunity

Throughout the book I have used a payment industry example product to illustrate my points. I was not involved in its development and while the inventor might have devised the product in a “Eureka” moment when out running, rather than using a structured approach, it is a useful example to explain the Inn8 Model because:

- This opportunity was exploited a long time ago and is not confidential
- I have long experience in the payments’ industry and know sufficient about the product while having had nothing to do with its introduction⁴; I can be completely neutral about it
- While it is simple enough for people from any industry to understand, it is sufficiently complex to warrant using the Inn8 Model.

As you work through you might like to have your own opportunity to work on.

Stage 1. Sense Opportunities

Canopy

Many organisations leave innovation to chance or innovate only in response to issues. If you want to innovate continuously, you will find it more effective to seek opportunities proactively. Opportunities typically arise from an issue or challenge that a person or organisation has. For example, in the payment industry (I suggest you think of examples for your own industry), I might identify a number of issues and challenges at a high level, e.g.:

- Card transaction acceptance is a part of the card payment value chain in which financial margins are tight
- Direct mailing of potential cardholders receives a very low response in some countries
- Growth in cards issued is levelling out in many markets making it harder to increase profits.

You should seek to tune your intuitive and analytical abilities so that you are able to sense opportunities on a regular basis rather than in a “Eureka!” moment. Build structures that encourage you and your colleagues to expose yourselves to new influences.

⁴ Though I have worked for and with Visa in the payments’ industry for over 25 years (as an employee and latterly as a consultant), this example is not a Visa product or service.

Trunk

Once you have found opportunities to exploit, you choose an opportunity to work on that meets your requirements, e.g. it has high potential returns.

Root

You take the decision to move on or stop and find another opportunity. At this step, like the diamond cutter's decision on whether to proceed with cutting a diamond, you and your team will use your experience and knowledge to make this decision, along with a tool I explain in Section 2.

Stage 2. Explore Opportunity

Canopy

To ensure the opportunity is worthwhile and to increase the knowledge of all involved, you carry out fact finding and record all of the key information that you need, e.g. in the card acceptance example, key information might be: how accepting banks earn revenue; acceptance costs; what has been done already to exploit it.

Trunk

Next, you define your opportunity in an Opportunity Statement, preferably written from the perspective of the person or organisation with the issue.

Root

Having explored it, you might decide to pause to obtain additional information or take this opportunity no further.

Stage 3. Clarify Opportunity

Canopy

Consider that most opportunities will consist of a number of related but different challenges. For example in a bank, "How to increase card acceptance profitability?" has at least one higher level challenge, e.g. "How to increase retail bank profitability?"

It also has at least two lower level challenges: "How to increase card acceptance revenue?" and "How to reduce card acceptance costs?" You can also split "How to increase card acceptance revenue?" into two lower level challenges: "How to increase new card acceptance revenue?" and "How to increase existing card acceptance revenue?"

You might also consider the opportunity from the perspective of the seller, e.g. "How to increase seller satisfaction with card acceptance?"

When using the Inn8 Model you call each of these challenges a “Potential Innovation Topic” (PIT) and the task in this Stage is to identify and generate many PITs. Experience shows that this:

- Broadens everyone’s understanding of the opportunity
- Gives you more potential opportunities to exploit
- Helps identify the right level of PIT that will help when you move to Stage 4 - Create Propositions, (e.g. “How to increase new revenues?” will likely generate fewer and probably different ideas to “How to increase revenues?”)
- Provides a sense of the level at which you can act, (e.g. I may not be able to work at the level of the retail bank, but I can act at the level of card acceptance).

Trunk

Having generated many PITs, you choose one (or perhaps more) to work on. These become your “Final Innovation Topic” (FIT).

Root

You make your decision to proceed, pause, stop or repeat a Stage.

Stage4. Create Propositions

Canopy

Using a tool or variety of tools, you generate or find a number of ideas or potential solutions.

Innovation arises when you find or create an original idea to exploit an opportunity and implement it. You may ask how you “find” an original idea. Consider that an idea may come from another industry but when you apply it to your industry, it becomes an original idea! Tom Peters, the bestselling business author, calls this “Creative Swiping”. (If you are not convinced, consider how pharmaceutical companies seek new ideas for medicines from the local plant knowledge of indigenous people.)

Trunk

If necessary, it usually is, you reduce your ideas to a manageable number, using questions to “sift” your ideas, e.g. “What benefits will this provide?” Having done this, you create one or more Initial Proposition Statements (IPS). People often reject ideas because they do not understand them. If you write a simple IPS to explain the idea more clearly it helps you to gain acceptance.

Root

You make your decision to proceed, pause, stop or repeat a Stage. At this point, teams often want to pause and carry out further research on the proposition they have generated. Instead,

by moving on to Stage 5, they can usefully evaluate the proposition and might decide to stop, so saving the time and cost of research.

Stage 5. Hone Proposition

Canopy

Consider your propositions from a number of perspectives to identify which will be the most attractive to take forward for implementation, at the same time honing them to improve them.

Trunk

Add your evaluation to the Initial Proposition Statement and create a Final Proposition Statement (FPS) for discussion with colleagues.

Root

Take your decision to proceed, pause, stop or repeat a Stage. Having perhaps evaluated more than one proposition, you may decide to proceed with some propositions and abandon others.

Stage 6. Shape Strategy

Canopy

By the end of this Stage, you will have shaped a strategy to enable you to sell and implement your chosen proposition and considered your team's ability to implement it.

Firstly, consider your proposition, next identify your client's Critical Success Factors (CSFs) and finally, assess what you must do to achieve this success.

Trunk

Establish key milestones towards delivering the proposition.

Root

Assess if the strategy is feasible and whether to proceed further or pause and reconsider.

Stage 7. Foster Acceptance

Canopy

Depending on the context, you may need to gain acceptance for your proposition from end users, other stakeholders and potential investors. For example, in larger organisations you need to persuade senior managers and other functions. In smaller organisations, you may need to persuade potential investors. Whoever the stakeholders are, you must consider what they each require and keep your message simple. In this step you think this all through and develop your message.

Trunk

You use a tool to reflect on Stages 1 – 6 of the Inn8 Approach and compile your evidence for stakeholders.

Root

You may pause here to get further information for stakeholders or proceed to the next Stage.

8. Plan Sprint Actions

Canopy

Now address what will help you move your proposition forward in the short term. You will use the “Sprint Actions” tool to enable you to achieve this. It helps you to be more effective when the opportunity is not your complete centre of attention at work, i.e. you also have the day job to do. If you have a full time project team assigned to implement your opportunity you can create a full project plan instead.

Trunk

Sprint Actions is one of those tools that takes you up in the canopy and down the trunk. You arrive at a realistic set of actions to move your proposition forward.

Root

Will you take the proposition forward or have you second thoughts about taking it to the stakeholders?

Additional Tools for Use With the Inn8 Model

The author of “The Creative Gorilla” continually adds to his toolbox of facilitation and innovation tools. Rather than “set them in stone” in the book, he prefers to update the toolkit regularly and so provides this download, free of charge from <http://www.yesand.eu>.

Here you will find additional tools you can use at the Canopy and Trunk steps in each Stage in the Inn8 Model, as well it provides a reminder of the Root step.

The author welcomes your ideas on how the Inn8 Approach might be made more useful for you and easier to implement in your organisation.

Please contact him at hi@yesand.eu.

Chapter 1: More Tools - Sense Opportunities

Canopy

Canopy Tool ~ Fresh Stimuli

REASON FOR USE

To encourage you and your colleagues to interrupt the normal patterns of information you receive so that you increase the potential to spot opportunities your competitors may not.

ACTION TO TAKE

Check if you take any of these actions:

Action	Tick
Go to exhibitions not related to your industry	
Liaise with organisations in other industries that do similar work to you, E.g. software testing	
Read magazines from other industries and other disciplines	
Invite speakers from other industries to talk to your team	
Join networking associations not specific to your industry	
Join social media groups outside of your discipline / industry	
Deliberately read a different newspaper occasionally	
Deliberately watch / listen to different TV programmes or radio	
Go for a walk / drive somewhere new / take a different route to work	
Have back office staff meet customers with your sales people	

Table 1: Fresh Stimuli Actions

This tool will also help you to stimulate ideas in “Create Propositions”. For example, running a project on process development, our team was looking for a positive way to report on progress. Sitting at traffic lights in London, I saw a billboard advertisement for TV licensing that stated the number of homes with TV licences in a London street and asked the question “Have you got a licence?” We used this idea (and the distinctive design) to tell people how many departments in the company had developed processes rather than singling out those that had not. This created a humorous response and drove more activity.

Trunk

Trunk Tool ~ Benefits / Difficulty Matrix

REASON FOR USE

This tool allows individuals and teams to make a choice between opportunities; the simple matrix provides a quick visual comparison for discussion. Benefits / difficulty are generic criteria, choose criteria relevant to your topic. Look out for the team identifying opportunities as “Difficult to Pursue” when they actually mean “Too scary and new to pursue”. You are seeking to innovate and that involves an element of risk.

ACTION TO TAKE

1. Create a grid as shown below and place Opportunities in the appropriate place.
2. Choose those to pursue from the upper left quadrant.

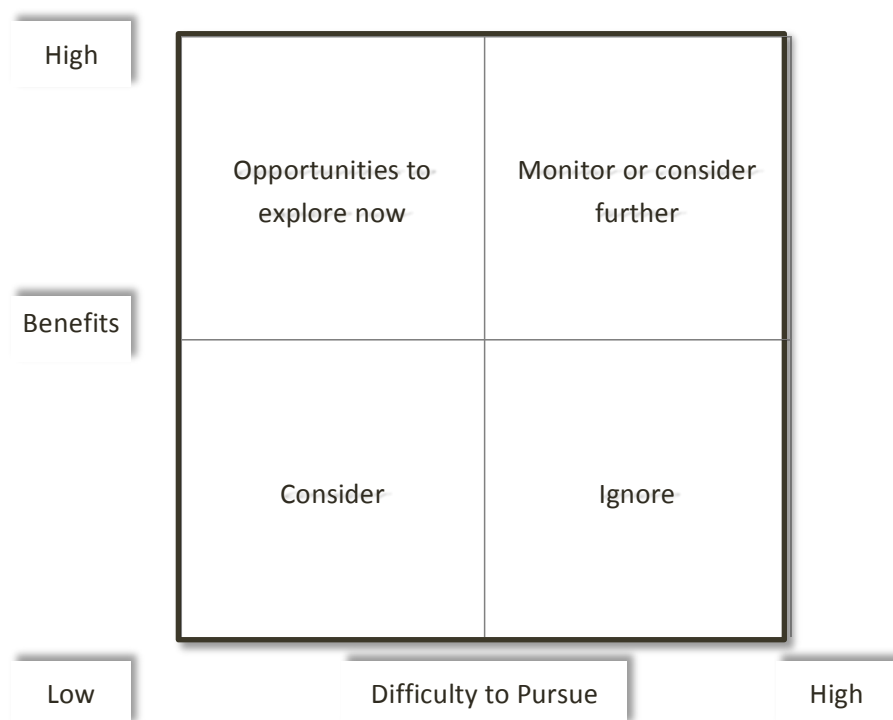


Figure 2 - Benefits / Difficulty Matrix

Chapter 2: More Tools - Explore Opportunity

Canopy

Canopy Tool ~ Haiku

REASON FOR USE

Haiku is a form of Japanese poetry in which you use 17 syllables in three lines; five – seven – five. Strictly speaking, it was not invented until the 1890's, adapted from the Hokku, the starting verse of much longer poems. Over a hundred years later, I thought it would be a great way to have people redefine their opportunity definition.

The power lies in the brevity and in the discipline of achieving the syllable structure. Brevity provides clarity and having to find words to match the number of syllables helps to give a subtly different perspective on your situation.

Some people find the technique powerful, some feel better for doing it and others find it irritating! It helps you think more creatively and can add humour to your session. It's quite useful to let people reflect on it overnight if possible.

ACTION TO TAKE

1. Consider the opportunity and reduce it down to 17 syllables in 5, 7, 5 pattern.

 - Keep strictly to the 5,7,5 pattern as this is the discipline that makes you think!

EXAMPLE

Acceptors struggle

To make money on card fees.

Sellers happy? No.

Canopy Tool ~ 4 x 4 Question Matrix

REASON FOR USE

To help explore a situation thoroughly.

ACTION TO TAKE

1. Work through the questions below and record the answers (on a chart works best).
2. Work in pairs or threes so that all can be involved.
3. If you have limited time, split the questions 1 – 8 between the small teams for answer on a flipchart
4. When complete, have the group review the flipcharts and add any comments

1. Why is this an issue for the person or people with the problem?	2. How do they experience the problem? What are the symptoms? [E.g. Who, What, Where, When?]	3. What other facts do we know about the problem? [E.g. Who, What, Where, When?]	4. What facts do we wish we knew?
5. What assumptions are we making about the opportunity? Are they valid?	6. Who else has a stake in us exploiting the opportunity? What is their interest?	7. What are the outcomes if we exploit the opportunity?	8. What have we already thought about or tried doing about this opportunity?
9. What skills / capabilities do we have to exploit this opportunity?	10. What people, time and financial resources do we have to exploit this opportunity?	11. On a scale of 1-10 and considering answers to Qs 9 & 10, how prepared are we to exploit this opportunity?	12. On a scale of 1-10, how motivated are we to exploit this opportunity?
13. What evidence from our past experience gives us confidence in our rating at "11" and "12"?	14. On a scale of 1-10, how important is it for our organisation to exploit this opportunity? Give reasons.	15. On a scale of 1-10, how urgent is it for our organisation to exploit this opportunity? Give reasons.	16. Is there a key date by which we must exploit this opportunity?

Figure 3 - Question Matrix

Canopy Tool ~ Pensieve

REASON FOR USE

This is a tool (named after a device in “Harry Potter and The Goblet of Fire” by J.K. Rowling) designed to help force out a lot of disparate information about the opportunity and access the subconscious. Typically, you use this tool if you are the person with the problem, you have been thinking about the opportunity for some time and you are confused or puzzled.

Personal experience and feedback from other people indicates that this tool can lift your mood because it permits you to express your opinions and emotions privately. The process can help you avoid self-censorship and premature judgement and it frees space in your mind for other points to surface that you have not considered before.

ACTION TO TAKE

1. Write a stream of thoughts on the opportunity, non-stop on to paper in essay format before your wrist ceases up. Ten minutes is a useful period of time to write.
 - Do not use a PC. The slowness of entering words tends to build in thinking time, which, as you have already done plenty of thinking, defeats the object of using the tool
2. Do not stop to think; this avoids analysing.
 - Imagine the paper has a built in spelling and grammar check – do not worry about these
 - Do not censor yourself. Go with the flow! Nobody else will see it
 - Keep your pen on the paper and do not sit back to reflect
3. When finished, read back over the piece and add more ideas if they arise.
4. Once you have completed Action 3, check that you have recorded key information. Analyse it to check that you have all the components of “Who? What? Why? Where? When? How?” If any components are missing, consider whether they should be there.
5. Identify key facts and list these to add to your analysis.

Canopy Tool ~ Systematic Metaphor

REASON FOR USE

To help you use metaphor in a structured way to explore the opportunity. You can use metaphor to describe a challenge in simple terms, (e.g. low levels of card acceptor revenue are a brick wall stopping growth) to help explore the opportunity and to generate ideas.

Metaphors move you to the abstract and back to your opportunity. In use, people tend not to use them systematically. This tool is useful for those people who like structure to aid their creativity. I also find that moving people's thinking from a real challenge to an abstract metaphor can reduce tension stemming from the challenge and help break mind set.

ACTION TO TAKE

1. Describe your challenge (your FIT) and generate a metaphor(s) or analogy for it.
2. Identify the characteristics of the metaphor / analogy.
3. Ask what these characteristics reveal about your situation.

It is better to work on the first column (generate the characteristics) and then the second column. This encourages you to climb up in the canopy then slide down the trunk as separate steps rather than moving between "canopy – trunk – canopy – trunk".

Different metaphors provide insights into different facets of a situation; if you use more metaphors, you will gain different perspectives and increase the chance of finding novel ideas. Have teams work through different metaphors for the same challenge and compare results.

EXAMPLE METAPHOR: A WALL

CHARACTERISTICS ASSOCIATED WITH METAPHOR / ANALOGY	WHAT DOES THIS REVEAL ABOUT THE OPPORTUNITY?
We can climb a wall	We can exploit the revenue opportunity
The wall can be demolished and rebuilt	Could we consider the opportunity as if we were just starting out in the business?
We can take individual bricks out without bringing the wall down	Let's describe every detail of acceptance so that we can spot ways to enhance revenue

Table 2 – Systematic Metaphor Tool

By the way, avoid the "Is it a metaphor, simile / analogy?" trap. It does not matter what it is as long as you can reveal characteristics and generate ideas from them:

Metaphors and similes, like peas in a pod, it seems to me.

We can argue their similarity, but let's not stoop to analogy.

Just use them for a tool, as we

Explore the opportunity.

Trunk

Trunk Tool ~ Understanding Steps⁵

REASON FOR USE

To ensure everyone understands the opportunity. It provides a good snapshot of the group's understanding, is quick, appeals to different modes of communication (visual, aural, kinesthetic) and questioning can also reveal further facets of the challenge. It is also much more effective than asking, "Any questions?"

ACTION TO TAKE

After the team has explored the opportunity, mark a scale on the floor to represent 1 to 10 where 1 is "least" and 10 is "most".

1. Explain the reason for using the exercise.
 2. Ask the group to stand at the "1" end of the scale.
 3. You stand at the "10" end of the line and summarise the opportunity.
 4. Ask people to stand at a point on the line that reflects their understanding of the challenge.
 5. If the group steps up to ten, there is no issue, but if people stand further down the scale, have them ask clarifying questions and provide them with answers.
 6. As you provide more explanation, people should move up the scale.
- If someone hangs right back, you can ask, "What information do you need to move closer to 10?"

⁵ I learned this tool from Cyril Kortleven of "New Shoes Today" Belgium and have put it into my own words.

Trunk Tool ~ Exploration Checklist

REASON FOR USE

To ensure you have explored the opportunity thoroughly and have not missed information.

ACTION TO TAKE

With your colleagues, work through the checklist below and ensure you can answer the questions positively.

Question	
1. Have we obtained sufficient information about this opportunity?	
2. Is the information gathered really fact or just opinions or beliefs?	
3. Have we been open minded in our investigation?	
4. Have we consulted with all stakeholders including potential customers and end users?	
5. Have we all been open and honest in our discussions?	
6. Are the assumptions we are making correct?	
7. Have we had a positive attitude about the opportunity?	
8. Have we focused on “What’s right?” not “Who’s right?”	

Table 3: Exploration Checklist

Chapter 3: More Tools - Clarify Opportunity

Canopy

Canopy Tool ~ Redefining

REASON FOR USE

This is designed to help you develop different definitions of your Potential Innovation Topics (PIT) in a systematic way and can reveal more imaginative and original ways of defining it. It asks questions based around different ways of thinking, (e.g. analytical and metaphorical) to encourage you to think through the challenge from different perspectives.

ACTION TO TAKE

1. Consider your original Opportunity Statement and complete the following statements, step by step:
 - A. Another way you could define this challenge / opportunity is...
 - B. The key to this challenge / opportunity is...
 - C. What I wish I could do is...
 - D. The challenge / opportunity is like...
 - E. An alternative, strange way of looking at it might be...
2. Now use your answers to help you define more Potential Innovation Topic statements.

EXAMPLE

Original: "Organisations that accept card payments through sellers find it difficult to be profitable." Example answers with example "How to" PIT statements in brackets:

- A. Sellers and banks find card acceptance fees intolerable for different reasons (*How to make card acceptance fees tolerable for both parties*)
- B. Card acceptance is a difficult business to make money in (*How to make it easier to make money from card acceptance*)
- C. Find a solution that makes all parties happy (*How to find a solution that pleases everybody*)
- D. Small shopkeepers are struggling to make a profit (*How to find other sources of revenue*)
- E. Having a hole in your trouser pockets (*How to stop money slipping away*)

Canopy Tool ~ Level Mapping (alternative version)

REASON FOR USE

This enables you to see a picture of the hierarchy of a situation and people can choose an appropriate level of Potential Innovation Topic (PIT) to work on. It is simpler to use than the one shown in my book.

ACTION TO TAKE

1. Use the Potential Innovation Topic statements the team has generated.
2. Place two sheets of flipchart paper next to each other on the wall in portrait position.
3. Place four Post-it Notes in a vertical pattern up the left side of the left chart, evenly spaced (use a different colour to the PIT Post-it Notes to distinguish them)
4. Write on each Post-it Note the following Categories (one per note): Individual; Departmental; Cross - functional; Corporate (whatever your top organisation level is).
5. Place your Potential Innovation Topics (PIT) from the previous exercise into one of the horizontal bands, depending on which level they fit (e.g. if the PIT requires cross - functional work, it will go at that level).
6. Once all PITs are on the charts, draw a horizontal line for each level.
7. You might like to identify vertical streams too, for example: Process, People, Product (but this is not essential).
8. Have people choose their favoured PIT as the Final Innovation Topic.

Chapter 4: More Tools - Create Propositions

Canopy

Canopy Tool ~ Where in the World?

REASON FOR USE

Not every idea has to be new. One definition of innovation might be “an idea that has not been used in your industry.” Tom Peters, the management guru, calls the process of finding and using these ideas “Creative Swiping.”

This tool encourages you to search for ideas outside of the environment in which you work. With the Internet this is easy to accomplish and as an exercise you might like to have people search for ideas via their phones or PC during your idea generation meeting. Alternatively you could review magazines from other industries. Some people may also have worked in other industries.

Remind people about the skill of deferring judgement. It is easy for them to say, “We can’t do that here” or other phrases that kill ideas.

ACTION TO TAKE

1. Have people consider other situations in which people have had to exploit similar opportunities or in which there is a similar principle, (e.g. the model for movement of parcels by couriers stemmed from how banks moved card payment information between different banks).
2. When the group has identified a few situations, explore what happens in those situations and “creatively swipe” any useful ideas.

EXAMPLE

For our card acceptance scenario, there is an exchange of payment and goods between one party and another.

The principle or concept seems to be an exchange. Perhaps we could explore how auctions work? Or commodity trading systems? Or libraries? Maybe we could use payment cards as library cards and enable fines to be taken automatically? True, it has nothing to do with the original FIT but... could we use payment cards to replace other systems of identity? Could that be a new source of revenue for card acceptors...?

Canopy Tool ~ Get Fired

REASON FOR USE

This tool encourages you to challenge the conventional rules of your situation and provokes fresh ideas. This is called a “Reversal” and it can be a fun and often a humorous exercise that increases energy. It can break the constraints limiting your creativity, often producing those ideas that people “dare not say” because it breaks conventional thinking (“Let’s stop the card issuers earning money from a transaction”; “Let’s pay people to use Point of Sale machines”).

ACTION TO TAKE

1. In small teams, generate a number of “stepping stone” or “springboard” ideas for how you might tackle this opportunity in such a way that you would be fired or at least earn the wrath of many people.
 - “Stepping stone” or “springboard” are metaphors for an intermediate idea used for provocation
2. Each team chooses their favoured stepping stone idea and passes it on to another team.
3. The other team has to devise a practical idea that is not a straight reversal.
4. Have the group review all the ideas and add to the overall list.

A note of caution here. Do not record the stepping-stone ideas in a report if there is any chance your list may be seen by those who do not understand the context! I recall a “proposed government policy” that appeared to be a stepping stone idea, being widely criticised in the press.

EXAMPLE

Again for our payment system example:

Springboard: “Let’s take the card acceptance terminal away.”

One response: “For companies that sell through both physical stores and the Internet, maybe we could offer an integrated payment service that does not use terminals in the store. Not sure how that would work but there might be some potential to gain revenue and save cost.”

Canopy Tool ~ Random Connection⁶

REASON FOR USE

To kick start your thinking or extend it further with more radical ideas. You can use a range of random items (e.g. clock; pen; scissors) or random words (open the dictionary at a random page and choose the first noun you see, or use a noun from a book) or pictures. Although this technique can appear strange, it really does work very well and is particularly good if you are stuck with no ideas at all. Some people can be sceptical about it or treat it as a joke. If they do, ask them to suspend judgement.

ACTION TO TAKE

1. Pair people up and have each choose a random item (which may be fixed or loose).
2. Have them “swap” their random item so it is truly random.
3. Create ideas by force fitting the item with your FIT, e.g. force fitting a clock with “How to increase new revenues for accepting banks” can lead you to consider aspects of time.
4. If you generate a “bizarre” idea (“stepping stone”), challenge the team to make at least one practical idea from it.

EXAMPLE

Have belief it can work! Let’s look at an example, using our card acceptor situation: “How to increase new revenue for accepting banks?” and choosing some items on my desk:

- A bowl with orange segments in it – it’s sticky and I think “sticky” in marketing terms means people keep using your product. Could we encourage cardholders to use their card in the store again and again?” We now have an idea we can explore in more depth. Perhaps offer vouchers through the terminal?
- A cycling bottle of water – it has “ZipVit” written on it. “Zip” makes me think of making the transaction process faster. Could we earn revenue from making transactions faster? Perhaps we could measure average transaction speed and charge higher fees on higher speed transactions in high volume sellers.
- Pair of headphones – make announcements to cardholders; that leads me to think, if accepting banks could cross sell products at the seller’s till and pay commission to sellers?

All of these ideas are not perfect but have potential for further exploration.

⁶ Random Connection techniques have been developed by a number of authors.

Canopy Tool ~ In Their Shoes

REASON FOR USE

To consider a Final Innovation Topic from the perspective of someone else so that people might develop more original ideas. By using a character, it can help release inhibitions and generate radical ideas by ascribing the source of the ideas to the character rather than the real person.

ACTION TO TAKE

1. Ensure you have built an innovative climate before using the tool.
2. Have the group identify a style of characters to use, e.g.
 - Other roles in the organisation (e.g. the Board, the MD, store assistants)
 - Stakeholders in the opportunity
 - Different nationalities
 - Different socio – economic types (the rich, middle earners, the poor etc.)
 - Different age groups (five year olds, pensioners etc.)
 - “Heroes” like film and sports stars
 - “Super heroes” like Batman and Superman
3. Have people become the different characters and generate ideas from their perspective:
 - For more radical ideas, view the challenge from greater extremes e.g. the Heroes, Super Heroes and five year olds. This tends to generate “springboards” as described previously
 - It’s important that people “become” the character they are using. I recall one session where I asked people to become five years old. How would a five year old tackle this opportunity? The group worked in teams of three. Most of the team adopted their characters and there was lots of noise and ideas flowing. However, I noticed one team were struggling. I went to over to them and noticed they were talking about five year olds. I suggested that instead of talking about them, they should be one and get on their knees. There was much rolling of eyes but they did it. Within one minute they created a terrific idea.

EXAMPLE

How would Superman increase revenue for card acceptors?

Superman says: “With my super strength, I can pick up the shops like piggy banks and shake every penny out of them”

Idea: Could we offer to round up every transaction to the nearest round number and raise money for charity?

Canopy Tool ~ DREAMERS

DREAMERS is a mnemonic (which fits quite nicely with idea generation) that I developed based on an idea by Robert Eberle. It is a systematic way to use “What if” questions. What if we: Divide; Reduce; Enlarge; Adapt (use and form); Mix; Exclude; Replace; Switch?

You can ask the question in terms of size and scale; function and scope; roles and responsibilities; sequence and flow, etc.

REASON FOR USE

To generate ideas by challenging various aspects of a situation, e.g. (Adapt use of time), “What if we were constructing this service 200 years ago?”; (Enlarge numbers), “What if this product were taken up by every card acceptor in the world instead of one country, what would we do then?”

PROCESS

How you use it depends on the topic. A simple way to tackle it is:

1. Take one of the categories (e.g. Divide).
 2. Use the 5Ws and H technique, that is: “Who, What, Why, Where, When and How” to prompt ideas for questions.
 3. Begin asking the questions and record the ideas (consider the Vent tool shown in the book to capture ideas)
- Be aware it can become a little too rigorous in use and energy might drop off. You might alternate using this with other tools.

If you want to be particularly thorough, Google “verbs beginning with” and look at the verbs beginning with different letters.

EXAMPLE

This idea to carry out foreign exchange at the point of sale could meet resistance from those who are currently earning money on it. This could slow its growth. “What if we divide the commission earned on the foreign exchange across all parties in the transaction, so everybody gets a percentage?”

Canopy Tool ~ Step Up Step Down

REASON FOR USE

This easy to use technique allows you to generate ideas by free association from an original concept. If you use it in a group, start as individuals and then share the ideas otherwise people may lead others.

ACTION TO TAKE

Take a concept, e.g. payment system. Go down a level to be more specific, e.g. terminals or up a level to be more general, e.g. technology and continue to go up and down and sideways until your examples generate a potential idea.

EXAMPLE

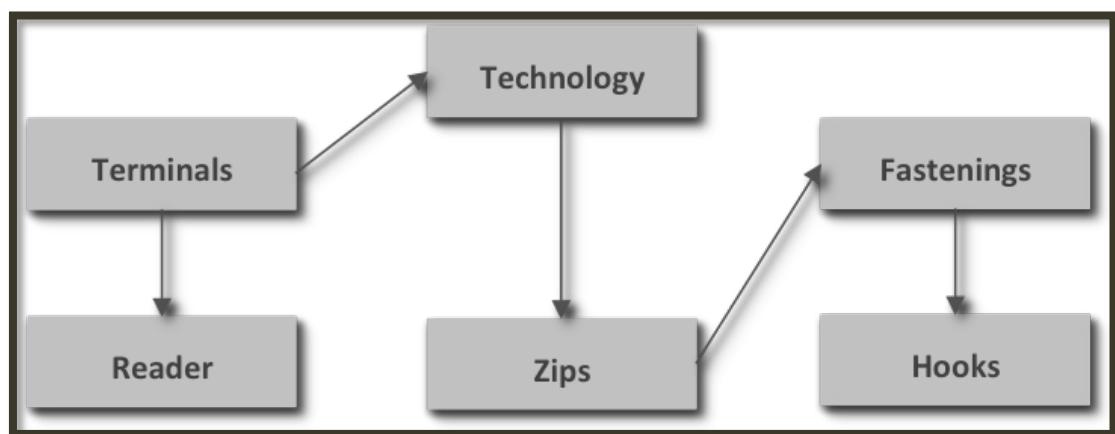


Figure 4 – Level Ladder

The concept of hooks (an advertising hook rather than a fastener) gives me the idea, “Could you have a terminal that asks a question about the latest advertising promotion by the accepting bank?”

If the cardholder answers correctly, they receive a prize from the bank and so does the seller. This leads me to another idea; the card accepting part of the bank offer their point of sale terminal network to the retail bank as a whole, as an advertising channel to raise revenue.

From this example you should see I am trying to provoke ideas in any way. If the word “hooks,” reminds me of something else that gives me an original idea, this is fine.

Chapter 5: More Tools – Hone Proposition

Canopy

Canopy Tool ~ Kids and Animals

REASON FOR USE

This is similar to “In Their Shoes” in that you use characters to stimulate thinking; the intent here being to simplify your proposition.

ACTION TO TAKE

There are different ways you can use this depending on your proposition:

1. Have people write their proposition statement so that a young child can understand it.
2. If it is a product or service, have them describe what a five year old would want to make it attractive to them. How would a five year old use it? How would a gorilla use it?

EXAMPLE

What would a five year old need to make currency exchange at the point of sale attractive to them? They would want:

1. Simplicity (the solution should have no more actions than a current card transaction)
2. Instructions in big letters and easy wording (there should be multi lingual written instructions in large type)
3. Primary colours (it must be very clear that this is a different process to the normal one)
4. Not to be told they must do it (it should be optional)

To conclude, the solution needs to have a clear and transparent process, with simple instructions for sellers and multi language explanations for cardholders.

Canopy / Trunk

This is another example of a tool that does not fit easily into Canopy / Trunk model as you generate the criteria and select them before carrying out the analysis and choosing your option

Canopy / Trunk Tool ~ Options Analysis

REASON FOR USE

Options Analysis is a deceptively simple tool you can use to choose from a range of ideas based on agreed criteria. The process of reaching agreement on the ratings helps to enrich understanding. There are some issues though:

1. Before you embark on choosing the criteria, ensure that you really need to make a decision. I recall a meeting in which the team spent an hour discussing what the criteria should be to choose between various activities. It was only after much heated discussion that the Managing Director said something like, “We do not need these criteria, we have to do everything on this list.” A good lesson learned there.
2. There is a danger people can see this tool as objective because it uses numeric ratings, but unless based on hard facts, the ratings themselves are subjective. It is better to discuss the reason for major differences in individual ratings, not focus on the total score.
3. The criteria must be independent of each other, if they are not, the “objective evaluation” can become biased.⁷ As a simple example, imagine you wish to choose between a Mini, a Ferrari, and a Rolls Royce. Three sensible criteria might be Economy, Top Speed and Comfort. Addition of a fourth, but not independent, criterion could make the analysis biased, for example if the fourth criteria was “ride quality” this would bias the result towards the Rolls Royce (it might be an aspect of comfort)

ACTION 1 ~ GENERATE CRITERIA

1. Have individuals generate criteria and write each criterion on to a Post-it Note. Good criteria to use for a potential proposition are:
 - It meets an immediate need
 - There is sufficient demand across relevant segments of the market
 - People will pay for it
 - It has features that make it stand out from the competition or alternatives
2. Post the notes and have the team review.
3. Cull duplicates and cluster similar criteria.
4. Discuss the criteria:

⁷ With thanks to David Mayle of the Open University for highlighting this issue.

- Be alert for people taking defensive stances
- Can you merge some criteria?
- Are some criteria related (you can map criteria on levels as you can map Potential Innovation Topics)? If so, choose the criteria at the highest level

ACTION 2 ~ CHOOSE CRITERIA

1. Make a choice using Dot Choice if necessary
- Do not choose too many or you will give yourself a difficult task

ACTION 3 ~ ANALYSE THE OPTIONS

1. Complete the list of options / ideas down the left hand side.
2. Complete the list of criteria along the top.

ACTION 4 ~ DEVELOP A RATING SCALE

This is a typical rating scale:

Excellent = 4; Very good = 3; Good = 2; Poor = 1

ACTION 5 ~ DECIDE IF YOU WANT TO WEIGHT CRITERIA

You might like to weight certain criteria in view of their importance. (Please see the figure overleaf). Be wary of people wanting to set weightings after rating; they may be seeking to influence the choice of option in their favour!

ACTION 6 ~ RATE THE OPTIONS / IDEAS USING THE RATING SCALE

Next, have individuals rate each idea against all the criteria: work column by column to rate an idea against each criterion.

- Do not work row by row to rate all the ideas against one criterion then the next as this makes your consideration of each idea haphazard.

ACTION 7 ~ DISCUSS SIGNIFICANT VARIANCE IN RATING

If people give significantly different ratings, you should discuss why each person gave the rating they did.

- This discussion is important as it may reveal a lack of understanding or different perceptions

ACTION 8 ~ ADD THE TOTALS

EXAMPLE

See next page

Criteria >	Quick to achieve	Regulatory Feasibility	Seller support	Achieves goal	TOTALS	
Ideas >						
Weight >	2	3	3	3	Unweighted	Weighted
A. Round up card transactions to raise money for charity and take a percentage	2	3	1	3	9	25
B. Carry out currency exchange at the seller at time of transaction	3	2	3	4	12	33
C. Carry out currency exchange when processing card transactions at the accepting bank	4	1	4	4	13	35

Figure 5 – Options Analysis Matrix

RATING

How well does the idea match up to the criteria?

Excellent = 4; Very good = 3; Good = 2; Poor = 1

To emphasise, the ratings each person gives are subjective; do not put too much credence on the total. Value instead the discussion around major differences in the ratings each person gives.

Chapter 6: More Tools – Shape Strategy

Canopy

Canopy Tool ~ Wreck the Implementation

REASON FOR USE

This technique can help you generate a large number of potential issues and ways to overcome them. Similar to Get Fired, it is a way to generate issues without making everyone miserable and injects humour. It gives everyone a chance to contribute fully and overcome inhibitions.

ACTION TO TAKE

1. Label sheets of flipchart paper with a heading that you want to focus on during implementation of your proposition, (e.g. People; Systems; Materials), one sheet per heading.
2. Draw a line down the middle of the page and label the columns, “How to Wreck” and “Ideas to Prevent This.”
 - Two people take a sheet and generate ideas to wreck the implementation and note these in the left hand column
3. When they have exhausted ideas, they put their sheet in the middle of the table and add ideas to a sheet that someone else has begun.
4. When “Wreck” generation ceases, the teams put all sheets back in the middle and redistribute them at random.
5. Split into teams to complete the second column:
 - Generate ways to overcome the ideas and record in the second column
 - Number the ideas so that people can put improvement suggestions on an additional sheet of paper if necessary (the sheet can fill up quite quickly)

Canopy Tool ~ Client analysis

While it is likely that you have had a client in mind during the earlier stages, at this Stage it is important that you have a very clear description of your ideal client. Having a clear understanding of the different potential clients for your proposition will enable you to shape a more successful strategy to implement it. If you are running a contiguous meeting, you will find it more difficult to do this, however, you might invite clients in or hold a teleconference with them to discuss the proposition.

REASON FOR USE

This tool helps you to clarify who will use your proposition. You may have more than one type of buyer and it is important to understand who they are as you may have to adapt your proposition for each.

ACTION TO TAKE

1. As a group, identify the different clients for your proposition:
 - For example, for the currency exchange proposition, your client is the card acceptor or the seller. The cardholder is not the client, but as the user, will have a big influence; consider them too
2. Split the group into teams by client and have each team write a profile, a couple of flipcharts, of their client:
 - Again, use 5Ws and H questions to flesh out your description, e.g. What are their needs / problems within the scope of your proposition? How will it impact them? How interested in it might they be? How can they be reached in terms of communications? What influence do they have?
3. If possible, interview the clients to establish if you have a good proposition for them.
E.g.:
 - Does it help them solve their problem?
 - What benefits would it provide, with what impact?
 - What issues do they envisage?

Trunk

Trunk Tool ~ Easy Challenge

REASON FOR USE

There are always obstacles to gaining acceptance for your proposition. These questions will help you to begin to identify how you might make it easier for potential clients to accept your proposition. Do this for the different client types.

ACTION TO TAKE

1. Split into teams and have each team work on one of the following questions: "How will we make it easy for our clients to...?"
 - Find out about our proposition? E.g. we might use Facebook for promotion
 - Purchase our proposition? E.g. financing options, one click purchase
 - Understand and use our proposition? E.g. clear instructions, training videos
 - Receive good service during and after sale? E.g. Web sites, user groups, product blogs

If you have a design element you might also ask, "How will we make it easy on the eye?"
2. After ten minutes, move people round the flipcharts to add further ideas, three minutes per flipchart.
3. Have the group review the charts and discuss.

Review Copy

Chapter 7: More Tools – Foster Acceptance

Canopy

Canopy Tool ~ Stakeholder Analysis

REASON FOR USE

You might use this tool at different stages depending on your need. Fostering Acceptance is a good time to focus you on the interest and influence of stakeholders and how you might move them from their current position.

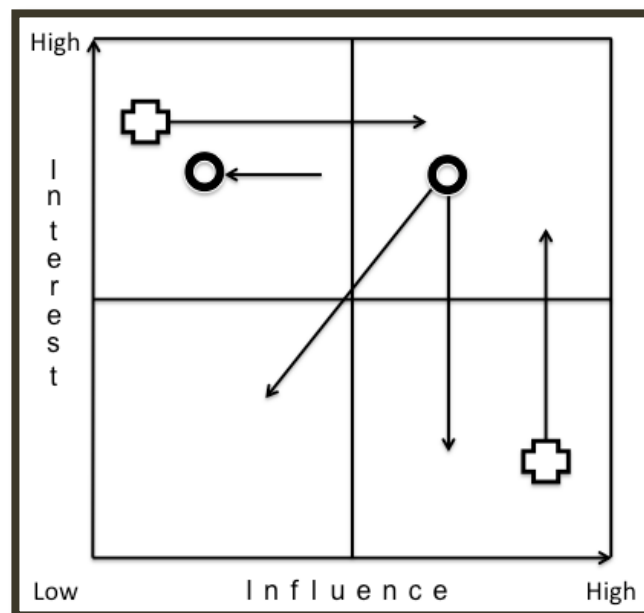


Figure 6 – Stakeholder Analysis Chart⁸

ACTION TO TAKE

1. Have individuals identify potential stakeholders and list them.
2. Build a matrix on a flipchart with **Interest** on one axis and **Influence** on the other (Please see Figure 17)
3. Plot your stakeholders on the matrix and identify if:
 - The interest they have is positive (+) or negative (O) as in the chart, e.g. if the proposition means that they will have more work, they may be negative about it
 - They have high influence over the success of your proposition or low influence
4. Identify how you might reposition them, if they have:

⁸ Based on Eden and Ackermann

- High positive interest but low influence. How might you help increase their influence? (E.g. you might invite staff representatives to a meeting to discuss implementation strategy)
- High influence but low positive interest. How might you increase their interest? (E.g. what features might you add that increase their benefits?)
- High negative interest and high influence. How might you reduce their interest or influence? (E.g. you might remove some negative features or arrange to have them moved from a key position – assuming you have the influence!)
- High negative interest but low influence. How might you ensure that remains the status quo?

Be aware of “sleepers” in the “low interest high influence” area who might be awakened should something change to their disadvantage. Clearly there is a need for some sensitivity on how you discuss this and report on it.

Trunk

Trunk Tool ~ Assistance / Resistance Matrix

REASON FOR USE

To assist you to think through potential factors that might facilitate and obstruct your project and how these might be built upon and overcome. It focuses you on positive factors during implementation as well as negative.

ACTION TO TAKE

1. Split the group into teams and identify groups and factors that might assist you in implementing the proposition and those that might create resistance.
2. Choose those that appear most important / most likely to have impact.
3. Using the matrix, list these and what form the resistance / assistance might take.
4. Work out how you might take advantage of the assistance or overcome the resistance. This will form input into later stages.

	Assistance	Resistance
Who? What?	Finance – flexible allocation of budget Holiday period – some spare time to work on this	Y Project – also seeking funds Y Project – taking IT resources
Plan	Speak to Head of Finance Set date when all can work on it	Speak to Head of Y project – might you share some resource?

Table 4 – Assistance / Resistance Matrix

Chapter 8: More Tools – Plan Sprint Actions

Canopy

Canopy Tool ~ The Team Book

REASON FOR USE

After all your thinking and planning, you have to put your plan into action and review its success. If you have thought through the opportunity and planned carefully, you should, as described earlier, meet much less resistance to your plans. However, your team's concerns may inhibit you from pushing ahead with implementation, especially if the opportunity is not a high priority for stakeholders. To increase your motivation to take action, follow the process below:

ACTION TO TAKE

1. Display the proposition statement. How do individuals on your team benefit from successfully implementing this? List these benefits.
2. Imagine you have been successful already and achieved the goal. What positive things are people saying about your team? What are they doing that pleases your team? What positive feelings does your team have? List these.
3. What personal resources does your team have to achieve your goal? What traits, skills, training and knowledge does your team possess? List these.
4. What external resources can the team call on? Whom can the team call on for support? List these.
5. When has the team achieved success in the past? What helped then? Can the team use it again? List this information.
6. Who do you know has succeeded with this in the past? What help might they give you?
7. What is the worst thing that can happen if this does not succeed? On a scale of 1 – 10, where 1 is as bad as anything can get in your life, how would you rate it? Record this information.
8. How might the team break this challenge down into small steps? Record the steps.
9. What is one small action (or actions) the team might take to get you started right now or very soon? Record this.
10. What opportunities for small wins might the team identify to encourage each other? List these.
11. How might the team make the journey to the goal more enjoyable? List these.
12. How might the team reward itself along the way for small and big wins?

Write the answers on to twelve A4 sheets. Compile them into a booklet and distribute the book to team members. Review it periodically.

Trunk

Trunk Tool ~ Action Planning Chart

REASON FOR USE

If you have a dedicated team or have identified projects that you can shelve, you should have time for a proper action plan. While this is a common tool, I have included it here for completeness.

ACTION TO TAKE

- 1. Prepare an Action Planning Chart (please see Table 14).
- 2. For each box that you completed in the Action Storyboard (please see Page xx), identify the actions involved.
- 3. Write each one on a Post-it Note.
- 4. Put each note on the chart in the order of the boxes 1 – 5 and use a different colour Post-it Note to mark the time period per box.
- 5. As you do this exercise, experience shows you will need to reorder the actions as you identify further actions.

STEP	WHAT?	HOW?	WHO?	WHEN?	WHERE?
1					
2					
3					

Table 5: Action Plan

About the Author



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John began his career in the RAF. He went on to become a Senior Vice President with Visa International, focussing on innovation and transformation of services.

These innovations include implementing the Visa ATM Network in EMEA, conceiving and developing the Visa Business School, the initial phases of Internet shopping, implementation of electronic banking and the centralisation of support in Europe.

John works internationally with medium to large organisations to help them make the most of opportunities.

He is a Solution Focus Professional Facilitator and Coach, a Kaizen Training Black Belt Facilitator, a Group Mastery Facilitator and Buzan Mind Mapping Trainer. Based on his experience and training, he developed the Inn8 Approach to innovation.

He has an MBA from the Open University, tutored on their “Creativity, Innovation and Change” MBA Course for 14 years and is a critical reader for the new course on this topic. He also tutors on the Open University course “Making a Difference.” He is the author of over 150 articles on these topics, which are available at www.yesand.eu.

With his Visa career and subsequent work, John has over 25 years of experience as a multi-cultural presenter and facilitator using Accelerated Learning and Creative tools to motivate and energise people. He works throughout Europe, the Middle East and Africa.

He works in a variety of sectors, including payments, construction, defence, telecommunications, pharmaceuticals and public. His regular clients have included organisations such as Visa Inc., BT, CH2M Hill and EADS and he works with various consulting companies as a meeting facilitator.