CoCreative Collaborative Innovation Roadmap

**Current State**
- System View (sky): Set initial strategic intent & ambitious working goal
- Experience View (ground): Form Design Team

**Future State**
- Draft & iterate on strategic blueprint
- Scale initiatives that work & expand impact

**Roadmap**
- ALIGNING
  - System View (sky)
  - Experience View (ground)
- CONNECTING
  - Form Design Team
  - Identify & interview system leaders & stakeholders 1:1
- LEARNING
  - Map key focus areas & strategic points
  - Select collaborators & convene the network
- DESIGNING
  - Prioritize critical shifts
  - Generate & prioritize initiative ideas
- MAKING
  - Develop prototypes with initiative users
- SCALING
  - Test & refine prototypes with initiative users
Aligning

- Set initial strategic intent and audacious working goal

Connecting

- Ideally & interview system funders & stakeholders 1:1
- Map key forces & strategic points
- Select collaborators & convene the network

Learning

- Prioritize critical shifts

Designing

- Generate & prioritize innovative ideas
- Develop prototypes & iterative ideas

Making

- Test & refine with initiators & users

Scaling

- Draft & leverage strategic blueprint & expand impact

CoCreative Roadmap

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

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

- Stakeholder Consultation Process
  - Test, socialize, and refine the goal: definitions, scope and hypotheses
  - Identify participants
  - Map the system and craft critical shifts
  - Deeply understand people's experience

- System Map
  - Pressure points, leverage points & choice points
  - Forces for & against the change we seek
  - Key actors, competitors and partners
  - Tensions impacting stakeholders

- Collaborative Innovators
  - Commitment to collaboration
  - Commitment to the change we seek with some skepticism
  - Expertise in their part of the system
  - Balance action and learning

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

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

- Initiative Prototypes
  - Developed, tested, and refined based on empathy interviews with real people whose experiences we must change or influence to achieve the goal
  - User Feedback helps us refine our thinking and learn about new factors for desirability, viability and feasibility that may inform our strategy and solution design

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

- Learning Loops
  - Test, evaluate, and refine our strategic blueprint and metrics to ensure that our strategy is complete, powerful, and efficient

Success Factors

- System View (sky)
- Experience View (ground)
CoCreative®
Collaborative Innovation Roadmap

Patterns

**Aligning**
- Set initial strategic intent & audacious working goal

**Learning**
- Identify & interview system leaders & stakeholders 1:1
- Map key focus, tensions & strategic points
- Select collaborators & convene the network

**Designing**
- Prioritize critical shifts
- Generate & prioritize innovative ideas
- Develop prototypes with initiative users

**Making**
- Test analysis & possibilities with more diverse set of stakeholders
- Converge around a shared analysis of the strategic landscape
- Help participants be okay with working intuitively & rapidly in generating ideas
- Get everyone to agree on a shared set of the most powerful initiative concepts
- Develop an empathetic view of people’s experience to inform initiative design

**Scaling**
- Engage stakeholders outside the network to test and refine initiatives
- Draft & iterate on strategic blueprint
- Scale initiatives that work & expand impact

**Current State**
- System View (sky)
- Experience View (ground)

**Future State**
- System View (sky)
- Experience View (ground)

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

- Engage stakeholders outside the network to test and refine initiatives
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- Engage stakeholders outside the network to test and refine initiatives
- Draft & iterate on strategic blueprint
- Scale initiatives that work & expand impact
CoCreative™ roadmap:

1. **Aligning**
   - Set initial strategic intent & audacious working goal

2. **Connecting**
   - Identify & interview system leaders & stakeholders 1:1
   - Map key forums, tensions & strategic points
   - Select collaborators & convene the network

3. **Learning**
   - Prioritize critical shifts
   - Generate & prioritize innovative ideas

4. **Designing**
   - Develop prototypes of innovative ideas

5. **Making**
   - Text & refine prototypes with initiative users

6. **Scaling**
   - Draft & iterate on strategic blueprint
   - Scale initiatives that work & evaluate impact

**Work Products**

- **Interview Guide** includes introductory email, pointed interview questions, tips on listening effectively, notes capture system.
- **Interview Reference Sheet** includes working definitions, hypotheses, goal and frame to test with interviewer.
- **Interview Prospects List** includes contact information, stakeholder collaboration, status of conversations, and potential participants.
- **Landscape Analysis** includes key themes and gems from interviews on current barriers, opportunities and tensions across the system.
- **System Map** includes forces, actors and strategic leverage points that help identify and prioritize critical shifts required to powerfully move us toward our goal.
- **Initiative Prototypes** includes a tangible and rough working example of the idea that can be tested and refined through early stakeholder input.
- **Initiative Concept Worksheet** includes a defined picture of audience, design principles, metrics, resources, stakeholders and steps to make the idea happen.
- **Initiative Workplans** includes roadmaps, spectrums, maturity models and timelines to bring the prototype to pilot.
- **Strategic Blueprint** includes all critical shifts and initiative concepts in a strategic plan, updated in regular intervals as concepts are launched and scaled.

**Current State**
- System View (sky)
- Experience View (ground)

**Future State**

**Intent Map** includes the network’s audacious working goal, narrative vision of future, scope, focus, frame, critical questions, hypotheses.

**Interview Guide** includes introductory email, pointed interview questions, tips on listening effectively, notes capture system.

**Interview Reference Sheet** includes working definitions, hypotheses, goal and frame to test with interviewer.

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