The idea of the OI Project Canvas is to provide a template supporting the setup of an open innovation or co-creation project. It allows you to describe, design, challenge, and pivot your OI initiative.

It is less intended to develop a general OI strategy, but should rather support the governance and successful execution of a specific project, addressing a concrete issue to be solved in an innovation context.

The objective of using the canvas is to consider all important issues and to get an understanding of the different aspects of an OI project – before you launch it! Use it also to document existing OI initiatives and case studies.

The tool originated from our workshops and executive seminars. Here, we often ask participants to develop a prototypical OI application in their own context --- and want to prevent that they forget to consider important issues.

Tips and tricks when using the canvas
- Start with the problem statement, along with the performance criteria. Then move quickly to potential contributors and participants.
- Try to balance between your own view and the perspective of relevant participants: Incentives should become aligned!
- You may use additional notes to go into more detail – the canvas should provide an aggregated picture of the core issues & questions.
- Think in alternatives! Fill several canvas templates for alternative setups (e.g. which participants can you reach with which channel?)

References and inspirations

Contact – we appreciate your feedback!
RWTH Aachen University, Technology & Innovation Management Group
time.rwth-aachen.de/time
Developed by Frank Piller, RWTH TIM
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### THE OPEN INNOVATION PROJECT CANVAS

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**What? Task / Problem Statement**

Formulate the open problem / task as precise but brief as possible.
- What is the key issue to be solved?
- Communicate performance criteria to potential contributors
- How can you identify potential contributors?
- Use external OI solution, but place it on own
- Central question is “openness” or your project:
  - Autonomy
  - Are there contributors from your existing network of partners, i.e. customers, suppliers, technology providers, established university contacts etc.?
  - Reciprocity
  - Remember: An OI project just “to test whether open innovation / co-creation could really work in our context” is not a good and sustainable idea!

Create a “tweetable” abstract of the task (140 characters). An illustration / picture helps, too! In addition, provide some longer description of context, constraints, background, use areas ...

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**With whom? Project Team**

<table>
<thead>
<tr>
<th>Problem owner</th>
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<tr>
<td>Who will profit from the solution and feels responsible (and motivated) to implement it.</td>
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<table>
<thead>
<tr>
<th>Executive sponsor</th>
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<tr>
<td>Budget and sponsorship, but also supporting external recognition and attention of project.</td>
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</table>

<table>
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<tr>
<th>Process facilitator</th>
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<tr>
<td>Process expert with OI skills and experience, coordinates team, platform, and external contributors. Keeps track of timeline, KPIs.</td>
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<tr>
<th>Evaluators / extended project team</th>
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<td>Other central team members, consultants, etc.</td>
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An important group are members of evaluation committee (award jury), selecting the “best solution” or “winning ideas”: Can be entirely an internal team, however in case of external idea contests, prominent external experts help to signal reputation of contest – and also get an external, unbiased perspective!

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**How? OI Platform & Method**

Which OI Method do you want to use?
- Consider the entire OI Toolbox!
- Central question is “openness” or your project: How much control do you want to keep? Direct search vs. indirect search (call) With the decision for a method, the decision for an OI platform follows:
  - Host on own OI platform (if available)
  - Use external OI solution, but place it on own channels (website, Facebook page, retail)
  - Use external platform and community: Which platform? Which intermediary?
  - What are key design factors of the platform?
    - Participant registration, submission posting, commenting, versioning. Do we need toolkit?
    - Social networking functionalities
    - Evaluation support: Screening, scoring, ranking, short-lists

**Where? Channels for Search & Communication**

- How can you identify potential contributors?
- How do external contributors learn about your problem? How to communicate/promote (“broadcast”) your project?
- Which existing channels, databases, contact lists, user files, etc. can you utilize?
- Do you have to acquire access to external communities? What is the role of the OI platform here? Can other partners help (industry associations, user groups, ...)?

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**When? Project Timeline**

- **Need Formulation**
- **Pre-Test**
- **Connect (launch)**
- **Assess & Evaluate**
- **Feedback**
- **Follow Up**
- **Acquire / Implement**

A realistic timeline and definition of important milestones helps to keep on track! Consider especially what happens after the project – when and how to follow up!

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**How much? Performance Criteria / Expected Gains**

What kind of submissions / solutions do you expect ?
- What are criteria for a winning solution?
  - Be as precise as possible – also consider what you don’t want to get.
  - Define measurable outcomes
  - Communicate performance criteria to potential contributors

What kind of results do you expect?
- What would be your “perfect” dream solution? What is an internal benchmark a successful solution has to match (e.g., existing cost, effort of project)
- Are there additional goals you want to achieve with the project? Think about learning, technology scanning, recruitment and employer branding, creating awareness & reputation, brand building, interacting in social media, ...
- Remember: An OI project just “to test whether open innovation / co-creation could really work in our context” is not a good and sustainable idea!

**Who and Why? Contributors and Participants**

- **Contributors and solution providers (“the crowd”)**
  - Who are potential and relevant participants and contributors/solution providers (“the crowd”)?
  - What will motivate them to contribute to your task, i.e. what are the required incentives?
  - Are there contributors from your existing network of partners, i.e. customers, suppliers, technology providers, established university contacts etc.?
  - Who could be lead users in the context of your task? Consider target and analog markets!
  - How about “unobvious others”? Where could they come from? How to find them?
  - Remember: In general, OI works best if there is an heterogeneous and large network of potential contributors and technology providers – and if incentives match the nature & structure of the task.

“Money markets” / high competition versus “Social markets” / less competition, more community

**Why? Extrinsic incentives**

Address extrinsic motivations which come from outside of the individual. Competition is in general extrinsic: it encourages participants to win and beat others.
- Money
- Points, free products, gifts ...
- User needs (open problem), dissatisfaction with existing solutions (for own application)
- Signaling and career concerns
- Learning and developing skills
- Reciprocity
- Reputation (also intrinsic!)

**Why? Intrinsic & social incentives**

Address intrinsic motivations. Driven by an interest or enjoyment in the task itself; exists within the individual rather than relying on any external pressure. Also relates to benefits deriving from social interaction with others.
- Fun and enjoyment, process experience
- Curiosity
- Professional and personal identity, reciprocity in user communities
- Dissatisfaction with existing solutions (for application by others)
- Autonomy
- Intellectual challenge
- Social reputation & status (also extrinsic)

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**Critical questions to ask when filling the OI Project Canvas**
**What? Task / Problem Statement**

Strong, durable gear materials that don't require lubrication and that can be used within conventional gear systems

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**With whom? Project Team**

<table>
<thead>
<tr>
<th>Problem owner</th>
<th>Mattias Gruener, BU ERT AM-FE</th>
</tr>
</thead>
<tbody>
<tr>
<td>Executive sponsor</td>
<td>Dr. Monika Post, CTO</td>
</tr>
<tr>
<td>Process facilitator</td>
<td>Peter Scheurebe, OI Office</td>
</tr>
<tr>
<td>Evaluators / extended project team</td>
<td>Gruener, Post, Schreurebe B. Gerrit, ERT F. Zantner, EMZ H. Apfel, ERT</td>
</tr>
<tr>
<td>External:</td>
<td>Prof. Müller, RWTH Dr. Hanfmann, VDMA</td>
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</tbody>
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**How? OI Platform & Method**

- "Broadcast Search" (RFP): full control of IP, stay anonymous, no interaction among participants
- NINESIGMA (First priority !!)
  - + much experience
  - + great solver base
  - - complex IP follow up (but all opport.)
  - - highest fee, value?
- YETZ.COM
  - + Innovative networking approach
  - + very responsive sales team
  - - little experience in problem domain
- INNOCENTIVE
  - + high reputation, recommended by Dr. Ihl
  - - rather academic solver base
  - - does this IP approach work for us?

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**Where? Channels for Search & Communication**

Solver base of OI Platform
Search for potential solvers via intermediary
In addition:
- Post RFP to VDMA member database,
- Use FVA mailing lists
- Contact China IEEE office ??

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**How much? Performance Criteria / Expected Gains**

- P1: Be compatible with conventional manufacturing
- P2: Able to operate in temp range 0 to 40°C
- P3: Hertzian stress up to 1600 N/mm²
- P4: Nominal drive torque > 100 Nm
- P5: Operating life > 10,000 hours

Internal success factors:
- Find solution with potential for exclusive IP / exclusive supplier contract
- Technology scanning (validation of existing knowledge)
- Find new potential partners for collaborative research in future projects
- Learn about capabilities of OI process
- Recruitment/HR?

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**Who and Why? Contributors and Participants**

Material scientists in general
Users in food industry, pharma (special conditions!)
Machinery manufacturers in extreme industries
General Chemists

Open to SMEs, individual inventors, academics, students, ...

Note: Do not send RFP to Wittenstein, Schaeffler, Festo, SFK personnel!

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**Why? Extrinsic incentives**

- ✓ Supplier contract
- ✓ In-Licensing budget of up to €80K (more requ. exec board decision)
- ✓ Phase 1 Funding (up to €100K p.a. from ERT Advanced Engineering Program)
- ✓ Integration into GEAR BUDDIES University Liaison Program / URP offer
- ✓ Recruitment opportunities

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**Why? Intrinsic & social incentives**

- ✓ Tough problem with high intellectual challenge
- ✓ Cooperation with leading firm in industry (us :)
- ✓ Networking opportunities to VDMA / FVA

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**When? Project Timeline**

<table>
<thead>
<tr>
<th>Need Formulation</th>
<th>15 Oct 2013</th>
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<tbody>
<tr>
<td>Pre-Test</td>
<td>30 Oct</td>
</tr>
<tr>
<td>Connect (launch)</td>
<td>10 Nov - 15 Jan 2014</td>
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<tr>
<td>Assess &amp; Evaluate</td>
<td>Internal 20 Jan - External 26 Jan (FVA)</td>
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<tr>
<td>Feedback</td>
<td>15 Feb</td>
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<tr>
<td>Follow Up</td>
<td>until 31 Mar</td>
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<tr>
<td>Q2 / 2014</td>
<td>Steering Committee 2 Apr !!</td>
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<tr>
<td>Acquire / implement</td>
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</table>
What? Task / Problem Statement

"Your ideas for our future vehicle interior."

Support design of FORD interior to turn challenges of demographic change and "senior drivers" into differentiation opportunities for FORD Europe.

How? OI Platform & Method

Web-based Ideation contest, draft as "social community problem";
emphasis on social problem (doing good), creating future solver community.

Address IP concerns of legal council

Compare two options:
(1) Stand-alone platform using HYVE co-creation platform ("IdeaNet"), connecting with external and distance communities
(2) Place INNOSABI Co-Creation App on Ford Facebook Page, use existing community.

With whom? Project Team

Problem owner
Peter Neumann, Ford Cologne, Development

Executive sponsor
Bernhard Mattes, CEO

Process facilitator
Dr. Siebertz, FFC Aachen

Evaluators / extended project team
Alex Vossen, RWTH (consultant)
Walter Pijls, Ford FC AC

Award committee:
Frank Leyhausen / Dr. Hackler, Dt. Seniorenliga
Prof. Pier, RWTH TIM
Ford: Neumann, Siebertz, Koch
- Ergonomics & Design Profs!
- Dealer representative

How much? Performance Criteria / Expected Gains

Applicable and realizable in large scale
Providing novel benefits of "universal" design
Originality and elaboration of submitted concept
Pre-scoring by community (feedback and comments, attraction)

Internal KPIs:
- Learning about co-creation (Q: how to measure learning?)
- Compare contributions by Facebook and external communities
- Generate at least ten forward looking ideas
- Contribution to PR and Social Media presence

Who and Why? Contributors and Participants

Seniors:
- Older drivers (65+);
- Senior experts (retired engineers, designers, car developers)

Others:
- Relatives of older drivers
- Lead users / car enthusiasts (tuning community)
- Ford Facebook Community
- Design students, interior designers

Why? Extrinsic incentives

✓ €5000 First Price
✓ €2K and 1K follow up awards
✓ Contract with FORD ??
✓ Career opportunities at FORD
✓ Create awareness for one's own work / get seen by larger audience
✓ "I will get old, too" - I may want to use this, too -> solve my own problem

Why? Intrinsic & social incentives

✓ Helping others
✓ Social challenge
✓ Fun for car fans / hobby
✓ Be able to contribute to future car development
✓ Meet likeminded people with similar interests
✓ Intellectual challenge; put past experience into good use

Where? Channels for Search & Communication

Perform Netnography to find relevant communities -> automotive, (interior) design, furniture, medical
Utilize Google Adwords
Customer database ???
Ford Facebook page, Ford homepage
Agency: MEDCOM Int. for contacts to senior communities

When? Project Timeline

Need Formulation 1 June 2012
Pre-Test 6 June 2012
Connect (launch) 15 Jun - 30 Aug
Assess & Evaluate 15. Sept
Feedback 20 Sep
Follow Up 1 Oct
Acquire / implement 15 Oct: Workshop with winning idea providers @ FFC

FORD Silver Market Interior Ideation

“Your ideas for our future vehicle interior.”

Support design of FORD interior to turn challenges of demographic change and “senior drivers” into differentiation opportunities for FORD Europe.