Forward

Innovation Transformation Guidebook, ITG, is a collection of flash cards designed to help small businesses innovate by strategically improving their current offerings. ITG methodologies are inspired from research in an array of fields including design, entrepreneurship, education, psychology, and sociology. Consequently, ITG approaches innovation problems more accurately by simultaneously investigating the customer, market, and business itself. Innovation Transformation Guidebook should be used as an interactive platform with a small business team. ITG cards are grouped three categories Inform, Expand, and Deliver. The flash cards contain prompts, questions, and diagrams meant for discussion and implementation. Small business owners using ITG should see increased revenue from the creation of new and/or relevant offerings directly tailored to their customer’s needs.
Directions

Discover ideas and needs of customers applicable to your business. Utilize the innovation processes in order to increase brand equity; test methods for gaining customer insight.

Directions:

1. Gather your team and inform them that they are about to embark on an innovation quest.

2. Read the Purpose card of every section so as to understand the concept as a whole.

3. Beginning with Identify, sequentially read, discuss, and implement the ideas on each card.

Inform  Expand  Deliver

1. Purpose  Innovation Introduction
2. Who  Establishes Goals
3. Why  Leverage Intrinsic Value
4. How  to Expand Boundaries
5. When  to Effectively Change
7. What  Identifies Lifestyles
The following chart illustrates the content in each section:

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<td>Customer</td>
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<td><strong>How:</strong></td>
<td>Innovation</td>
<td>Globally</td>
<td>Feedback</td>
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<td>Expansion</td>
<td>Process Cycle</td>
<td>Cognitive Science</td>
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<td></td>
<td>Education</td>
<td>Ethnoscience</td>
<td></td>
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<tr>
<td><strong>Where:</strong></td>
<td>Frame Challenge</td>
<td>Organize</td>
<td>Non-verbal Behavior</td>
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<td></td>
<td>Market-Based</td>
<td>Communication</td>
<td>Formal Contract</td>
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<tr>
<td></td>
<td>Management</td>
<td>Offering Cycle</td>
<td>Business Consulting</td>
</tr>
<tr>
<td><strong>Where:</strong></td>
<td>Strategic</td>
<td>Psychology / Design Economics</td>
<td>Psychology</td>
</tr>
<tr>
<td></td>
<td>Evaluation of</td>
<td>Psychology</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Assets</td>
<td>Holistic Evaluation</td>
<td>Connotative Measurement</td>
</tr>
<tr>
<td><strong>Where:</strong></td>
<td>Economics</td>
<td>Education</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Sensory</td>
<td>Customer</td>
<td>Intergalactic Questions</td>
</tr>
<tr>
<td></td>
<td>Perception</td>
<td>Opportunities</td>
<td>Lifestyle Branding</td>
</tr>
<tr>
<td><strong>Where:</strong></td>
<td>Psychology</td>
<td>Research Methods</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Ecological</td>
<td>Design</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Psychology / Design</td>
<td>Grounded Theory</td>
<td></td>
</tr>
<tr>
<td><strong>What:</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

With: Silver-Carold
Inform

Identify / Ideate

1. Purpose  Innovation Introduction
2. Who     Establishes Goals
3. Why     Leverage Intrinsic Value
4. How     to Expand Boundaries
5. When    to Effectively
7. What    Identifies Lifestyles
Identify

Inform

1. **Purpose** Innovation Introduction
2. **Who** Establishes Goals
3. **Why** Leverage Intrinsic Value
4. **How** to Expand Boundaries
5. **When** to Effectively
6. **Where** Latent Assets Unfold
7. **What** Identifies Lifestyles
Identify Purpose
To discover new offerings that adds value

Discover ideas and needs of customers applicable to your business. Utilize the innovation processes in order to increase brand equity; test methods for gaining customer insight.

Directions:

1. Gather your team and inform them that they are about to embark on an innovation quest.

2. Read the Purpose card of every section so as to understand the concept as a whole.

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Identify Who
Understand who your customers are. By looking at customer’s lifestyles holistically, latent needs can be discovered.

“What does your current market look like and what are the major needs of the consumers within that industry?”

Persistence is key to create a worthwhile offering. Henry Ford went bankrupt twice before Ford Motor Company became a success. Henry Ford said, “Failure is the chance to begin again more intelligently. It is just a resting place.”
Identify Why
Customer behavior will increase brand equity, especially on a low budget

Empathizing with your customer enhances your offering capabilities. Sincerity and knowledge are benefits to be capitalized upon.

Joseph Pine’s & James Gilmore’s interpretation:
The progressions of Economic Value and Valuable Intelligence

Develop a strategy for effectively communicating a clear message to aid the user. Do not focus directly on the sell, but skillfully shed light to ‘why’ your offerings maximize needs and epitomize their desires (i.e. aid process, convenient, child-proof, less expensive with more benefits, and easy to use).
Identify How
Expanding boundaries beyond the inevitable setbacks

Augment classic ideas with a new twist. Lead by taking calculated risks to develop new endeavors.

Brainstorm past, present, and future concepts that will evoke a platform of ideas. Begin by charting untapped territories to elicit extraordinary discoveries. If you do not want to be the pivotal market leader, educate yourself to know what brands to follow.
To ensure that time is utilized to the fullest, it is imperative to develop a plan. With any venture or exploration, a framework can guide (not repress) the development and delivery. This framework may be applicable for individual research.

<table>
<thead>
<tr>
<th>Frame Challenge</th>
<th>Scope of project, industry, interest</th>
</tr>
</thead>
<tbody>
<tr>
<td>Reason or Cause for Action</td>
<td>How does it relate to you, company, other offerings?</td>
</tr>
<tr>
<td>Exploration Period</td>
<td>What is your inspiration and methodology for discovering?</td>
</tr>
<tr>
<td>Reaction</td>
<td>How did the discovery process evolve after research? What kinds of expectations are your audiences expecting?</td>
</tr>
<tr>
<td>Change</td>
<td>As your project develops, how many stages of growth will you allow?</td>
</tr>
<tr>
<td>Purpose for implementation</td>
<td>How will your project make a difference in the long term? What social issues or modern day relevance does it apply to? How can your project be useful to all departments within the company or one’s life?</td>
</tr>
<tr>
<td>Presentation Document Process</td>
<td>How will you present your information? What do you imagine your display to look like? What equipment or technology would be needed to reach a global audience? Is your work, process, and content worthwhile to publish?</td>
</tr>
</tbody>
</table>

Structuring company presentation templates for personal exploration ahead of time will cause employees to manage their success from the start. A bottom-up exploration process inspires more people to enrich their perceptions, thereby increasing performance exponentially.
Unfold latent assets ranging from: sharing eclectic skills, interviewing informative friends, and attending public events targeting your customers. Digitally catalogue a database for teammates to leverage.

Economist William Baumol said for a country to advance there must be three quintessential parts: knowledge, capital and technology.
Identify What

Many senses must be appealed to in order to foster a favorable brand perception.

Incorporating sensory mechanisms can intensify an experience for a customer (positive or negatively) and can trigger memory associations for your brand.

Communicate and evoke meaning from all senses

- **Taste**: Typical or unique, sweet, sour, salty, spicy, etc. 
  - Temperature

- **Hearing**: Insulation, public vs. private, global decibels, distance
  - Visual collage, what represents...
  - Meaning, scale, color, brightness

- **Smell**: Allergies, sensitivity, etc. 
  - Distance — Bakery

- **Touch**: Material, relate to body, mood — atmospheric, austere or comfortable 
  - Durability

For example, the smell of Lysol® may make the room smell clean even though you can visually see that it is not. Incorporating multiple senses reinforces your brand message.
Inform
Identify / Ideate

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5. When to Effectively
7. What Identifies Lifestyles
Facilitating innovation starts with understanding your customer’s perspective by seeing why and how they establish meaning within particular situations.

As a team, set yourselves amongst the public and pick out potential customers. Engage and observe. Document findings.
**Ideate Who**

Designate roles essential to achieving goals, benchmark process, and show results.

As a multi-disciplinary team, recognize the goals of the project. Assign individual and group responsibilities that leverage team talent to be reliable for overcoming external threats and internal weakness.

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**Goals**
Are the overall aspirations

**Objectives**
Are the parts of a goal

**Principles**
Are the process of each step to obtain an objective

---

Similar to a functioning hospital, a doctor should perform surgery and the chef should have food ready by lunchtime.

Companies who collaborate and strategically adapt are more likely to succeed; knowledge and preparation are key for realizing additional revenues.
Fuse services and features into your line that complement the characteristics of your customer. Uniting offerings that exceed customer expectations makes for brand superiority.

Identification and confirmation of a successful offering will create brand equity.
Leveraging complementary products to bundle, advertise, or sell will create brand identity. Packing an aura around your product can globally be experienced online.

Decide how you want your company to be seen as well as the potential methods for achieving that image. Use your customer profile findings to figure out the best way to put your image out there.
Have a central means of organizing and referencing milestones to ensure completion within the time frame.

- **Gantt Chart**: Map out specific goals, objectives, principles and document milestones.
- **Google Calendar**: One account organizes a team's calendar online for free.
- **Base Camp**: Too small for a server? Compile information on in a secure data base for a small fee.

Create a visual organizational tool that displays ownership and accountability.
Fearless exploration is the process of generating a plethora of well-rounded concepts to emphasize a particular idea. Intertwine ideas that relate but may not typically apply.

**Explosively Connecting**

1. Collect ideas that are wildly unattainable yet thrilling
2. How could the ideas be scaled to a ‘real world’ situation?
   - See how a Liquor Store would advertise...

Simulating a slice of your vision will excite the team and aid in deciding a course of action. Try expressing thoughts quickly with a magazine collage. Collages instantly communicate atmosphere, mood, meaning, and artifacts through color connation, pattern, and activity context.
Ideate What

Individual dispositions needs; for personable research, what do they need to know about you?

Optimize your next offering by understanding what your client’s life entails. Create personas, or detailed representations of client “types”, that articulate customer needs.

Documenting a spectrum of customers and their aspirations in a consistent framework will provide a Day-in-Life sketch that can attune your offerings.
Expand

Interact / Improve

1. Purpose Innovation Introduction
2. Who Establishes Goals
3. Why Leverage Intrinsic Value
4. How to Expand Boundaries
5. When to Effectively
7. What Identifies Lifestyles
Interact

Expand

Interact / Improve

1. **Purpose** Innovation Introduction
2. **Who** Establishes Goals
3. **Why** Leverage Intrinsic Value
4. **How** to Expand Boundaries
5. **When** to Effectively
6. **Where** Latent Assets Unfold
7. **What** Identifies Lifestyles
Forecast panoramic ideas that integrate a hybrid of ordinary to extraordinary offerings relating to modern concepts and masterpieces.

Constantly define parameters, relevant to your company... “where” can you identify lifestyle attributes? Don’t wait to follow trends when your capable of learning more about your customer in less than an hour; directly relate to your customer.
Interact Who
Explicitly share individual, group, and project points relevant to aiding or hindering success

As a team benchmark “Strengths, Weakness, Opportunities, Threats,” in the industry, and within your own company. Strategic planning allows the team to be adaptable when enhancing core competencies by avoiding liabilities.

SWOT charts are a way to collaborate and identify company talent, resources, and assets against current market upside openings and downside risks.

Internal Strengths & Weakness
- Core competencies
- Financial resources
- Intellectual property
- Latent employee skills
- Marketing prowess
- Management team
- Unique business model
- Debt
- Capital to expand
- Cost structure
- Managerial skills
- Not innovating
- Strategic alignment of initiatives

External Opportunities & Threats
- Competitive weakness
- Demographic trends
- Diversification
- Globalization
- New products/ market segments
- Partnerships
- Barriers to market entry
- Demographic trends
- Economy changes
- Industry trends
- Product/ market life cycles

Documenting thoughts on sticky notes and placing visibly in the workplace serves as a reminder.
Interact Why
Applicable frameworks expedite efficiency

Creating a service that tailors to the product will turn one-time purchases into a continual revenue builder. Find how you can sell to other businesses that will purchase large orders frequently.

Documenting recurring customers will add value to your company if you decide to sell, as a customer base is already provided.
Interact How
Integrating customer information for your company can be sharpened by an iterative process

Research starts with you. Constantly be aware of all situations. Make sense of how people interact within a location, nature, formal situations, and situational contexts.

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<tr>
<th>Step 1</th>
<th><strong>Ask Integrative Questions</strong></th>
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<tbody>
<tr>
<td>WHO</td>
<td>Categorize thoughts and see overview relationships of ideas and people:</td>
</tr>
<tr>
<td>WHAT</td>
<td>- Alone, privately, socially, publically</td>
</tr>
<tr>
<td>WHERE</td>
<td>- Environments, elements</td>
</tr>
<tr>
<td>WHEN</td>
<td>- Extreme, unique, somber, surprise</td>
</tr>
<tr>
<td>WHY</td>
<td>- Fear, Happiness</td>
</tr>
<tr>
<td>HOW</td>
<td>Identify distinguishing points where actions and activities disjoint.</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Step 2</th>
<th><strong>Error Identification</strong></th>
</tr>
</thead>
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<tr>
<td>At what points are there:</td>
<td></td>
</tr>
<tr>
<td>Troubles</td>
<td></td>
</tr>
<tr>
<td>Time delays</td>
<td></td>
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<tr>
<td>Voids in the process</td>
<td></td>
</tr>
<tr>
<td></td>
<td>What is the conditional cause for interruption or success?</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Step 3</th>
<th><strong>Meaning Percentage</strong></th>
</tr>
</thead>
<tbody>
<tr>
<td>What is the cause for acting?</td>
<td></td>
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<tr>
<td>What is meaningful and relevance at pivotal times?</td>
<td></td>
</tr>
<tr>
<td></td>
<td>When communicating, make sure to analyze findings in an explicit format of measurement.</td>
</tr>
<tr>
<td></td>
<td>Agree with your teammates a mutual way to evaluate intangible experiences.</td>
</tr>
</tbody>
</table>

Who indirectly or directly shapes your industry? Discuss with the group and interact with the public.
Interact When
Immediately start your second plan once you launch the first

Differentiating against competitors can be attained by communicating your brand features, quality, and difference between new models.

Integrate customers in your development from the start. Prepare an action plan on ‘how to’ achieve your next phase.
As a business owner, tools and constraints can lessen customer’s wait time frustration. Identifying lags in the system can help turn a weakness into a strength.

Organizing store layouts, having real-people answer the phones, and a knowledgeable staff will ease the transition for customers to purchase your offering. Inexpensive entertainment factors for varying crowds will reduce friction and frustration. Example, if you own a car service shop, or any other company that has a waiting room, make sure that you have women’s and kids magazines as opposed to just ‘Cars’.
Intertwine methods by your time availability and vulnerability to interact with potential users. Any method will be at least somewhat successful with a sincere try.

<table>
<thead>
<tr>
<th>Observer from Afar</th>
<th>Participate</th>
<th>Integrate</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Fly-On-Wall</strong></td>
<td><strong>Day-in-Life</strong></td>
<td><strong>Trial Testing</strong></td>
</tr>
<tr>
<td>Stake out a public place and observe your customers interact. Unknowingly people will let down their guard and expose themselves to subconscious reactions.</td>
<td>Find a willing customer who will allow you to follow them throughout their day, the purpose is to notice “how” they modify offerings to easily be accessible under situation constraints.</td>
<td>Have users test out your offering and provide feedback</td>
</tr>
<tr>
<td><strong>Spatial Pattern</strong></td>
<td><strong>Phone Calls</strong></td>
<td><strong>Representational Models</strong></td>
</tr>
<tr>
<td>Record where people move around and for how long they: handle, congregate, or repeat similar actions to maximize utility.</td>
<td>Have willing volunteers allow you to call them at any point and describe what they are doing within the context.</td>
<td>Have participants represent their perspective through relationship diagrams.</td>
</tr>
</tbody>
</table>

If you use recipes when you cook, consider user testing methodologies to gain a 30-minute insight, zestier than your secondary text. Contrary to what we think, people adapt their practices to work within their constraints, knowing why and how they improvise helps to understand where to make changes.
Improve

Expand

Interact / Improve

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4. How     to Expand Boundaries
5. When    to Effectively
7. What    Identifies Lifestyles
Classifying unique customer desires will help your company to be knowledgeable and ready for delivery of high expectations.

Gathering pieces of information from market research can point you in the right direction to seek lifestyle behaviors.

User testing scenarios will define what changes should be applied to sway customers' moods, thereby enabling them to spend more, stay longer, become loyal, or just flat out leave.
Find how to propose significant offerings within your customer’s personal syntax. Discuss how people’s behavior repeats in particular situations towards: tangible items, people interactions, and tasks.

Meld improvements based on discovering the motivating factors for similar oddities, cause and effect behavior responses in particular situations.
Improve your company's awareness locally and globally by providing clear information about your company. Do not limit your offerings to a single genre of customer; diversify your message to at least three different areas.

Simplify your message to limit noise. Manage capacity by grouping features together logically. Confirm that customers are able to efficiently and autonomously access information on your offerings, especially the offerings that account for 80% of sales.
Incorporating customers into your discovery process can be helpful in validating each of your collaboration phases: observation, participation, and implementation. Before finalizing your insights to a deliverable, consult previously filed tests to verify that your research is correct.

Engaging customers outside the office will provide a realistic perspective on how the product should function, appeal, and apply to customers.
Improve When
Customers need services the most

Administer care by having an action plan ready for reacting to specific situations. Role-playing and employee pep talks emphasize problem-solving skills.

Purpose
- Work: Draft, Presentation
- Leisure: Life span
- School: Cost to quality
- Home: Need advice?

Mood + Tone of Voice
- Livid
- Irritated
- Frustrated
- Stressed
- Apathetic
- Charming
- Chatty
- Normal
- Suspicious
- Incoherent

Level of Service
- Low, Medium, High

Learning to read body language will help you perform the delivery of a service effectively.
Field test accurately by transferring thoughts into numbers. It is beneficial to have participants determine the degree to which they are communicating. Document through a matrix, thereby sorting and classifying during the process.

Creating a matrix prior will allow a researcher to quickly fill inputs to document.

<table>
<thead>
<tr>
<th>Semantic Scales</th>
<th>Percentages</th>
</tr>
</thead>
<tbody>
<tr>
<td>- List extremes between value marks</td>
<td>For any conversation have</td>
</tr>
<tr>
<td>- Ask participants to mark value /</td>
<td>team members and testers</td>
</tr>
<tr>
<td>symbolic meaning</td>
<td>define “degree or what</td>
</tr>
<tr>
<td>- Multiple layers can be coded by color</td>
<td>percentage”</td>
</tr>
<tr>
<td>and shape</td>
<td></td>
</tr>
</tbody>
</table>

Loyal customers use your offerings frequently, their latent perspective will manifest explicit opportunities.
Lifestyle branding packages can reinforce your product/service as a means for your customers to express themselves. Comprehensively uncover potential target markets by extensively answering each question.

<table>
<thead>
<tr>
<th>Interrogative Questions</th>
<th>Represent How, to what degree?</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Who</strong></td>
<td>Personas (a fictional representation of a stereotype)</td>
</tr>
<tr>
<td>Does this concern?</td>
<td></td>
</tr>
<tr>
<td>Contributes to the problem?</td>
<td></td>
</tr>
<tr>
<td>Contributes to the solution?</td>
<td></td>
</tr>
<tr>
<td>Who does what?</td>
<td>Situation (Personas are involved in what types of activities)</td>
</tr>
<tr>
<td>Are the main people involved, minor people?</td>
<td></td>
</tr>
<tr>
<td>Pays the most?</td>
<td>Setting (Paint the mood by the description of the location)</td>
</tr>
<tr>
<td><strong>What</strong></td>
<td></td>
</tr>
<tr>
<td>Is the purpose?</td>
<td></td>
</tr>
<tr>
<td>Are the factors?</td>
<td></td>
</tr>
<tr>
<td>Can be of benefit?</td>
<td></td>
</tr>
<tr>
<td>Task for completion?</td>
<td></td>
</tr>
<tr>
<td><strong>Where</strong></td>
<td></td>
</tr>
<tr>
<td>Do the events occur at each part of the day?</td>
<td></td>
</tr>
<tr>
<td>Is the range of places that people are occupying</td>
<td></td>
</tr>
<tr>
<td>Do employees or customers use that space</td>
<td></td>
</tr>
<tr>
<td>What is the frequency space is utilized at peak times?</td>
<td></td>
</tr>
<tr>
<td><strong>When</strong></td>
<td>Constraints (How the setting changes depending on presence of people and time)</td>
</tr>
<tr>
<td>Who and where do people interact at what time?</td>
<td></td>
</tr>
<tr>
<td>How are interactions different at different times?</td>
<td></td>
</tr>
<tr>
<td>Does the context change when another person is present?</td>
<td></td>
</tr>
<tr>
<td><strong>Why</strong></td>
<td>Behaviors Change</td>
</tr>
<tr>
<td>Do these categories relate?</td>
<td></td>
</tr>
<tr>
<td>Why is there a change in behavior?</td>
<td></td>
</tr>
<tr>
<td><strong>How</strong></td>
<td>Relationship as a whole</td>
</tr>
<tr>
<td>Can there be more touch points?</td>
<td></td>
</tr>
<tr>
<td>Can the experience be magnified?</td>
<td></td>
</tr>
</tbody>
</table>
Deliver

Implement / Integrate

1. Purpose  Innovation Introduction
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Implement

Deliver
Implement / Integrate

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Implement Purpose
Mirror offerings to lifestyles

Enhancing or repositioning your brand message can also be obtained by aligning your company with organizations that promote the social issues important to your customers.

Synonymously branding your offering into a lifestyle capitalizes upon identity needs. Customers see and respond to media parallels: celebrities, brands, and social causes.
Implement Who
Cater to multiple view points

Be aware how your customer’s needs should met throughout the year. Noting behavior and concerns will help your company to flourish.

Dedicate products or services that: expedite, aid, and increase overall enjoyment around a particular event, season, or process.
Implement Why

Efficiently label a customer to your package

Implement lifestyle branding tactfully around your customers to create offerings that conform to their current disposition. Identify what constitutes the transformation of convenience, preference, quality, and apply.

5000+ Celebrities have been photographed with Ed Hardy’s brand identity internationally, in four years

Ed Hardy campaigns: hip, youthful, yet surpassed age and gender stigmas

Ed hardy now expands his line to commodities, so that even a need represents his/her personal philosophy.

- Look up Ed Hardy: http://www.donedhardy.com/about_us.html
- Ed Hardy by Christian Audigier, is a trendy brand that coils its image around celebrities, advertising the lifestyle glamour. Ed Hardy, uniquely exemplifies how to embody a set of customer’s beliefs, exploit a niche concept, and infiltrate a global market in fleeting time.
Implement How

If you put out a free coupon would you have a line around the parking lot?

Know and deliver what it takes to have instant response from your customers. Implementing customer feedback, smooth operations, and knowing ‘why’ your company is genuine, will help determine how to increase or maintain market share.

Internally assign ‘who’ approves and handles feedback.

Google ways to apply responsive feedback within your industry.
Implement When
Start with the end in sight

Formally delivering services or accepting them can be executed through a nine step process, generated from the consulting expert, Phillip Wickham.

At each stage, measure your qualitative data to express the numerical value. Estimating numerical figures and exhibiting documentation will supplement the valuation of your intangible recommendation. Therefore, your time is able to have to have factual proof for compensation.
Implement Where
Hedge your plan by becoming bilingual in business

For your serious ideas, write or modify your business plan: a standard document to communicate your concept within business. A quick outline will serve as a useful tool to communicate your company for potential investors, similar to a resume.

<table>
<thead>
<tr>
<th>Business Plan Contents</th>
<th>Main Points of Consideration:</th>
<th>Details Include:</th>
</tr>
</thead>
</table>
| Most Meaningful Points to convey within the first page | For an investor:  
- Executive summary, Management team, Financial Projections: Cash flow & ROI  
- How fast do you plan to sell your company | - Service Industry  
- Markets to attend?  
- Knowledgeable employees or just leader?  
# employees, growth, experience |
| Executive Summary | - Return on investment (as a %)  
- Internal rate of return (length of time)  
- Current and potential risks  
- Company: type, locale, management, operating plan | - Industry: characteristics, size, competition  
- Market: size, growth trend, customer location  
- Offering description: price, position, legal, lifespan  
- Market size, growth trend |
| Financial Information | - Historical financial statement: cash flow, income statement, balance sheet  
- Pro formas (projected financial documents)  
- Expected market share  
- Year 3 market share, break even point, cash flow, ROI (Details)  
- Upstart Capital | - Sales, cost of production/services, operating expenses, profits, estimated cash flow  
- Assumptions for rational: best/worse case scenario |
| Website Links | Small Business Administration  
www.sbaonline.sba.gov  
Business Plan Preparation Center  
www.bizplanprep.com | - Starting a business, registering, advice, local offices  
- Writing a business plan, advice |

A business summary is a clear way to express an intangible idea. The classic setup communicates a professional sincerity.
Implement What
Implementing to differentiate against competitors

Customers select offerings on the basis of performance or preference. Depending on the type of customers and business capabilities, one route over the other may be more advantageous for your company to pursue.

Enhance your offerings to appeal to needs or market an emotional connection through: promotion, placement, price, and product.
Integrate

Deliver
Implement / Integrate

1. Purpose Innovation Introduction
2. Who Establishes Goals
3. Why Leverage Intrinsic Value
4. How to Expand Boundaries
5. When to Effectively
7. What Identifies Lifestyles
Integrate Purpose
Adapt meaning and provide incentives for all to thrive

Defining relevant offerings for older users...

The organization of Innovation Transformation Guidebook is constructed so that growth continues but the methodologies recycle.

1. Vision for Team
   Includes
   Agree to work well together
   \[1 + 1 = 3\]

2. Think Holistically
   in Context

3. Identify an archetype
   Customer(s)
   (unbiased/honest Feedback)

Directions
Identify Directions to Integrate Interpretation for each situation
Purposely: Think fresh with each situation

Who is he

What are meaningful activities

How does this translate?

Purpose:

General summary of thoughts

Research target market to understand what are relevant offerings...

“I think young”

Find true stereotypes of users, document patterns of customer types

- Ergonomic
- Safe
- Convenient
- Hip
- Unorthodox
Integrate Who
Our business connecting with customers

WHO is your current competition?

Who:
What [purpose] and [why] should one should care

Your company Solving customers encumbrances
Psychology

Significance of customers segmentation to your company
Ecological Psychology

Collaborate w/customers

...Ergonomic
- Safe
- Convenient
- Hip
- Unorthodox

Lifestyle Branding
Marketing, Psychology

How do you differentiate?
Integrate incentives for customers and employees

Goals  Objectives  Principles

Open Communication
- Small or large team
- Knowledge
- Responsibility

Build Team
- Designate roles
- Foster ownership
- Trust
- Reward performance

Higher Return
- Organize
  - Efficiency
  - Simplicity
  - Routine

WHAT can "We"
- Do better
- Learn next time

Listen
- Be humble
- Know when to
  - Apologize
  - Change
  - Work hard

As a leader: facilitate synergy within for cohesive energy out
Balance: A strong work ethic & intrinsic appreciation

Starting a company with limited resources, it was important to have another set of goals to retain help. Other goals include: preliminary patent, manufacture, pre-sell, and create lifestyle branding.
Integrate Why
Applicable frameworks expedite efficiency

Externally

- Attain Goals / Perception
- Market Leader
- Public Awareness
- Exceptional Service

Internally

- Nurture Details
- Relevant Offerings
- Employee Ownership
- Educate Employees

Cater your intrinsic value to your customers lifestyles: needs, wants, and desires.

Why:
Why it is important for those [who] are involved and [how] it makes a difference

Does each part make sense to the common goal?
Capitalize on intrinsic value

Get the big picture with few words...

Customers must be aware, be able to access, and navigate to purchase

Business Leadership

Knowledge Navigation Ease of Access Cost & Associations

Gain by Document Spatial Patterns Document Spatial Patterns How do they use the space? Appropriately constraints for Audience (Footprint)

- Designed for second nature reactions - Appropriately constraints for Audience (Footprint)
- Designed for second nature reactions - Most likely

- Competition for price vs. quality
- Competitive advantage
- How to reduce cost
- Track costs

Distance + Size Material appropriate for use?

21 22 23

Just like a billboard, does your campaign clarify your offering?

Consider these properties...

Wisdom = Transformation

Customer Behavior

Customer Relevance = Greater Return - Cost/Value

Design Economics

Entrepreneurship + Lifestyle Branding

Because lifestyle branding works rapidly: Ed Hardy
Integrate How
To step outside the box

Generate best and worst ideas far beyond on the norm with holistic perspective.

**STEP 1**

A. Place ideas in context of a scenario of users: needs, wants, desires relevant to their lifestyle.

B. Identify what cultural issues need to be addressed to appeal to a general crowd.

C. Establish channels of distribution and sites to access your offerings.

**STEP 2**

- Does what fulfill the purpose?
- ‘Who’ is shopping gives feedback
- ‘What’ can be done, by ‘When’

**STEP 3**

Obtain feedback throughout each step and verify relevance with customers, industry experts, and key figures.
Depending on the environment, people are more prone to behave in certain ways and need particular items.

Generate unique offerings by mixing ordinary and extraordinary ideas. Creating a hybrid of new and old ideas will invoke fresh meaning. Follow the steps to mingle pop culture influences with your offering.

Literary and cultural influence posses characteristics of consumer lifestyles. Collage a representation of your customer lifestyle to represent and benchmark customer aspirations.
Integrate When
Encompassing change from start to finish

When:
What action necessarily applies to each category now and in the future

Expand
Open Communication is best in a nebulous process. Accessing information and project status will allow people to measure progress.

Inform
- Begin with a project statement that defines scope of work and dates for your company.
- When in the field, observing discretely does not require consent unless loitering or taking pictures
- Ask customers if you can follow them around throughout their day for an incentive

Deliver
- Test and confirm target market scenarios at each offering phase with actual customers and experts, at least 10 total.
- Document results in a tangible form.
- Translate findings to be applicable for further research and for business valuation.

-Learning more about your industry can be as simple as a phone call to an expert or ask customers what is important.
-Extensive projects should be investigated from a holistic standpoint at all levels. Time frame varies per project.
Connect with customers in the creation, maintenance, and revaluation of viable opportunities.

Research in the customers’ context to improve new offering.

Tailor service to customers behaviors.

Psychology

Structure offering to provide synergistic value to customers’ lifestyles. Document to retain value and teach new employees.

Establish purpose and benefit to individuals and the company.

Openly communicate documented findings.

Behavioral Organization

Observe, participate and implement service to be executed most effectively in particular situations.

Formalize Contract

Business Consulting

Revitalize Offering Cycle

Psychology + Design Economics

Frame Challenge

Business Management
Integrate Where
Leveraging Latent Assets

Mentorship

BUSINESS

- **ABMI Mergers & Acquisition**: Dan Lolocono, CBI, CCIM
- **Koch Industries**: D.R. Leach, MBM Management
- **Small Business Development Center**: Will Katz, Director

EDUCATION

School of Business: Wally Meyer, Director of Entrepreneurship
School of Design: Richard Branham, Chair of Interaction Design
Mark Fiden & May Tveit, Industrial Design Professors
School of Engineering: Dr. Richard D. Hale, Aerospace Associate Professor

**Pittsburg State University**: Pittsburg, KS
- Engineering Department: Dr. Larry Williamson, Plastics Department Chair
- Dr. Jim Otter, Engineering Chair
- Dr. Bob Susnick, Plastics Professor

**University of Massachusetts**: Lowell, MA
- Plastics Engineering: Dr. Robert Malloy, Plastics Department Chair

Interviewed Experts

**Drive Medical Supplier**: Largest Shower Chair
- Manufacturer/ Distributor
  - Sales Manager: Dave Smith
  - Product Manager: Patient Aides: Bill Baker

**Koch Industries**: Largest Privately Held Company
- (Business Management)
  - Interaction Designer: Daniel Brake
  - Koch Creative Group: Terri McCool
  - MBM Management: D.R. Leach

**University of Massachusetts**: Lowell, MA
- Plastics Engineering: Dr. Robert Malloy

**University of Kansas**: Lawrence, KS
- Center for Technology Commercialization:
  - Executive Director: James Baxendale

Toured Facilities

**Manufactures**
- Design Ltd. (Quick Prototyping, Thermal Forming): Bourne, MA
- Kastle Grinding (Water Jet Cutting for Plastics): Lee Summit, MO
- Koch Industries: (invista, Koch Refineries): Wichita, KS
- Mayfield Plastics (Medical Device Manufacturer): Sutton, MA
- The Onyx Collection, (Shower & Tub Basins): Belvue, KS

**Plastics Engineering Departments**
- Pittsburg State Plastics: Pittsburg KS
- UMASS Lowell: Lowell, MA

Show Rooms
- Design Products Distributing: Overland Park, KS
- Kitchen & Bath Designs of Lawrence: Lawrence, KS
- MedFurniture: Lawrence, KS

What assets are available to your team within the community and industry?
Be aware of your surroundings and open to change

Participated

Business Workshops

ECJC: Enterprise Center for Johnson County, KS
- "Bootstrapping Your Business" (Notes Only)
- MidAmerica Angel Investor Meeting
- "Valuation of the Early Stage Company"
- "Valuation Considerations"

2008 Global Entrepreneurship Week: Kansas City, MO
- Kauffman Foundation: Hip-Hop and Entrepreneurship
- Panel Discussion with: Master P and Chuck D (Public Enemy)

NeoCon 2008 World Fair: Chicago, IL
- Student Participant: The University of Kansas
- 3 Day event with 1,000+ Innovative Vendors
- Established contacts for future reference

New Venture Competitions
- The University of Kansas: Lawrence, KS
  - Mark L. Morris New Venture Competition
  - Grand Prize Winner
- University of Missouri at Kansas City: Kansas City, MO
  - Regnier Family Foundations New Venture Challenge
- University of Nebraska: Lincoln, Nebraska
  - UNL New Ventures World Competition

With less than $5,000 dollars Silver-Gerald was able to holistically find alternative solutions for learning about the medical device industry in ten months. Simply making a phone call opened up an opportunity to visit industry experts in medical device materials in Massachusetts.
The achievement of Innovation Transformation Guidebook and Silver-Gerald, LLC is to continue to develop goals in an interactive process by informing, expanding, and delivering.

Explosively Connecting

Deliver

User Testing

Expertise

Inform

Purpose
Who
Why
How
Where
When
What
Innovation Transformation an Iterative Process for Discovery

Start
Cycle the directions to establish priority per customer segment

Validate customers’ perspective with tangible representation or description
Adapt for continuous change

To Establish Meaning
Connect with customers
Understand & Articulate

In the Environment
Ethnomethodology
In the Environment
Action Research

Define Meaning: Collaborate
Your view on the situation

Validate Customers’ Perspective
Allow Customers to share view

Ecological Psychology

Socially How?
Measuring for whom? Perception
Where?
Measure How? What is the value?
Authority Industry Experts
Local
Individual
Adapt

Validate scenario with customers and leverage core assets

Start
Cycle the directions to establish priority per customer segment

Package and Sell to customers’ preference and for performance

Recycle
Silver-Gerald case study presentation, illustrates how a small business would utilize the Ubiquitous Tool Box template.

1. Silver-Gerald is an innovative company from two college students who were passionate about their idea and fortuitously had the conviction to move forward.

2. Serious about succeeding through differentiation, Silver-Gerald uses the Ubiquitous Tool Box as framework to reflect, discuss, and apply ‘what to make’ by executing from a strategic level.

3. Silver-Gerald uses the Ubiquitous Tool Box as an impromptu for questioning how to achieve goals at each phase with a fresh perspective. Utilizing the methodologies help enhance offerings and customer relationships to increase overall company value.

The Ubiquitous Tool Box is to be applicable to a company at any particular state. Silver-Gerald is an innovative solutions company in the mature research and development stage learning how to effectively become a profitable business.

Picture Above: Current Silver-Gerald Team with shower chair prototypes.
Repeat

Discover ideas and needs of customers applicable to your business. Utilize the innovation processes in order to increase brand equity; test methods for gaining customer insight.

Directions:

1. Gather your team and inform them that they are about to embark on an innovation quest.

2. Read the Purpose card of every section so as to understand the concept as a whole.

3. Beginning with Identify, sequentially read, discuss, and implement the ideas on each card.

References


10. Goals <b>Strategic Execution</b>  
   "Branham, Richard. (2008). Principles (evidence in the literature, Human Factors), Guidelines (how to apply the Principles) and Programs (how to apply the Guidelines to a specific company, like branding and design policies, e.g. Target Design Program). Unpublished manuscript, The University of Kansas, Lawrence, KS.

11. Customer Relevance = Greater Return <b>Design Economics</b>  

12. Holistic Evaluation <b>Education</b>  

13. Individual Disposition <b>Ecological Psychology</b>  

14. Research Methods <b>Design</b>  

15. SWOT <b>Business Consulting</b>  

16. Framework Efficiency <b>Accounting/Legal</b>  

17. Process Cycle <b>Ethnosciencce</b>  

18. Offering Cycle <b>Design Economics</b>  


