

# Innovation transformation®



*A Guidebook for Small  
Business Development*

Inform  
Expand  
Deliver

*with case study:*

**Silver H Gerald**

MA Interaction Design  
Ann Fitzgerald © 2008

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# 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.

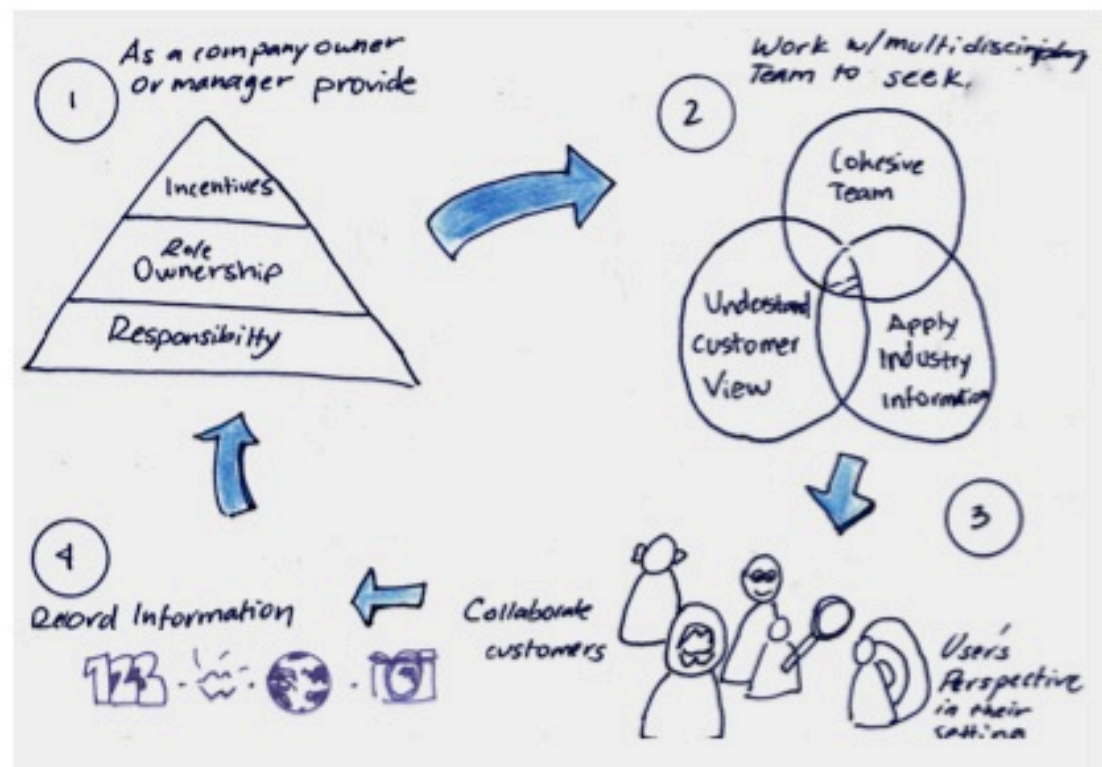


# Directions

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.
4. Document findings to: reference, validate, teach, and apply.



# Innovation transformation®

## 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 .....
- 6. **Where** Latent Assets Unfold
- 7. **What** Identifies Lifestyles .....

# Matrix *of* Contents

The following chart illustrates the content in each section:

	Inform		Expand		Deliver	Integrate with Silver-Gerald
	Identify	Ideate	Interact	Improve	Implement	
Purpose	Directions Action Research	Collaborate Business Leadership	Holistic Evaluation Education	Scenarios Phenomenology (Philosophy/ Education)	Global Lifestyle Branding Marketing, Psychology	
Who:	Current Market Entrepreneurship	Goals Business, ROI	SWOT Business Consulting	Customer Opportunities Ecological Psychology	Customer Opportunities Ecological Psychology	
Why:	Wisdom = Transformation Customer Behavior	Customer Relevance = Greater Return Design Economics	Framework Efficiency Accounting / Legal	Customer Touch points Business Leadership	Global Lifestyle Marketing Entrepreneurship / Lifestyle Branding	
How:	Innovation Expansion Education	Globally Lifestyle Marketing	Process Cycle Ethno-science	Reevaluate Action Research Education	Feedback Cognitive Science	
When:	Frame Challenge Market-Based Management	Organize Communication	Offering Cycle Psychology / Design Economics	Non-verbal Behavior Psychology	Formal Contract Business Consulting	
Where:	Strategic Evaluation of Assets Economics	Holistic Evaluation Education	Russian Activity Theory Developmental Psychology	Semantic Differentials Psychology, Connotative Measurement	Business Plan Entrepreneurship	
What:	Sensory Perception Psychology	Customer Opportunities Ecological Psychology / Design	Research Methods Design	Interrogative Questions Grounded Theory	Lifestyle Branding Marketing, Psychology, Sociology	



# Inform

Identify / Ideate

1. **Purpose** Innovation Introduction
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# Identify

## Inform Identify / Ideate

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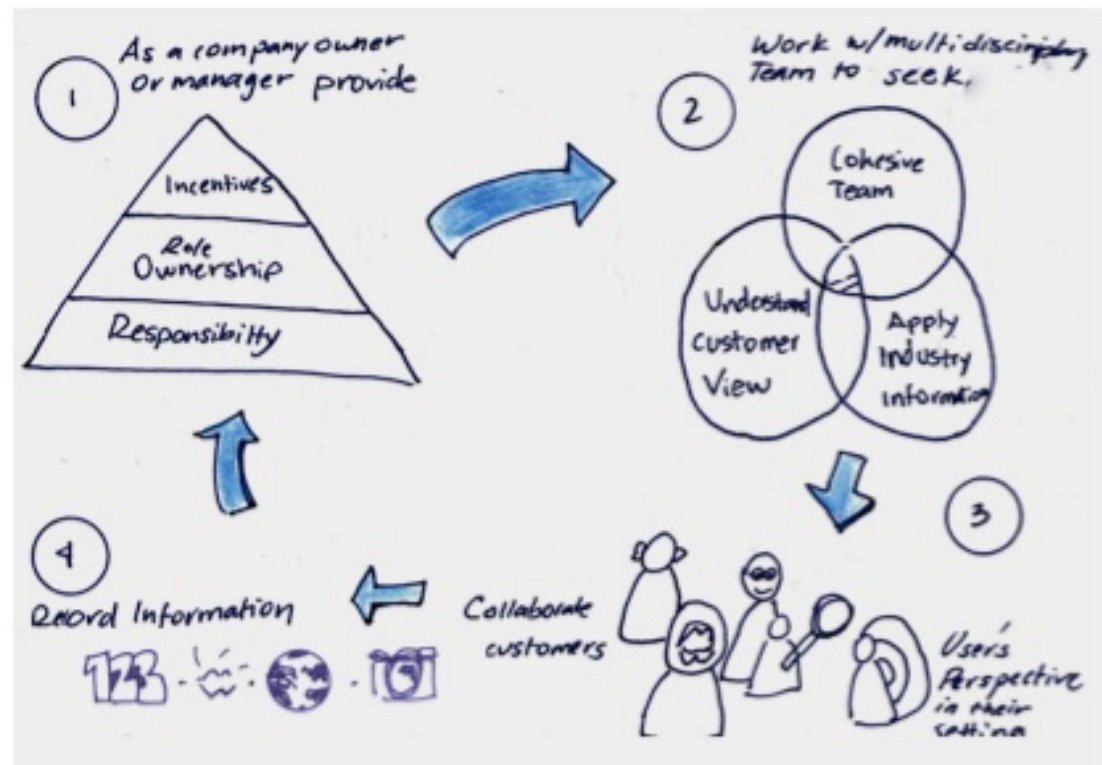
# Identify Purpose

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:

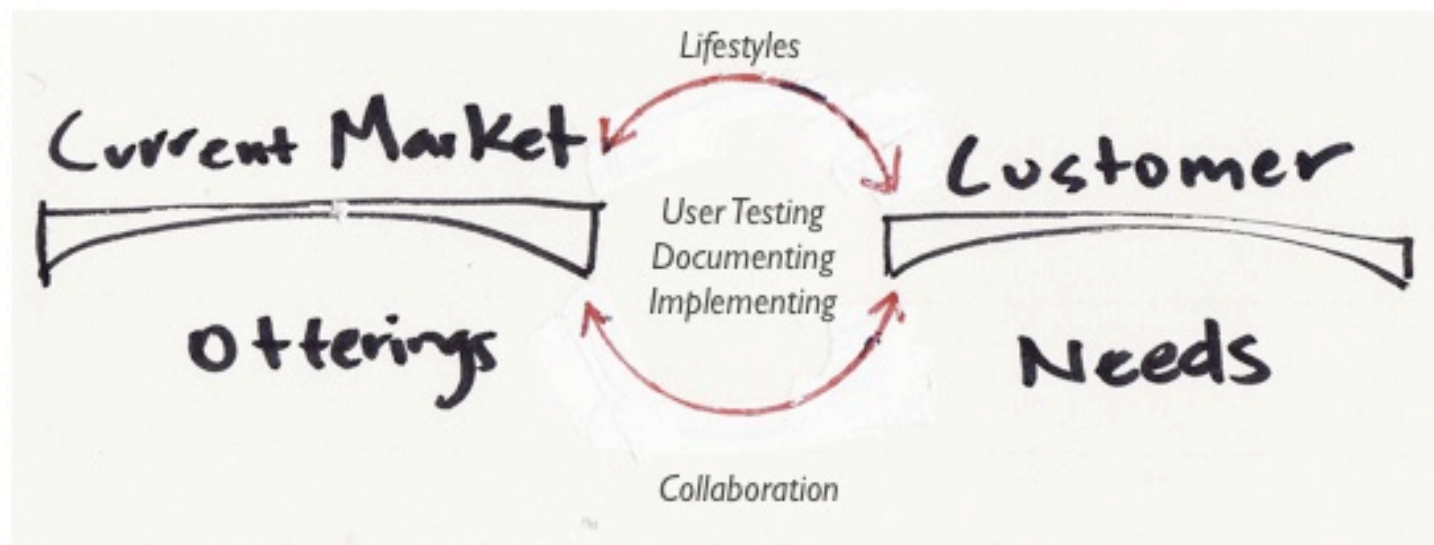
1. Gather your team and inform them that they are about to embark on an innovation quest.
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## Identify Who

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?”



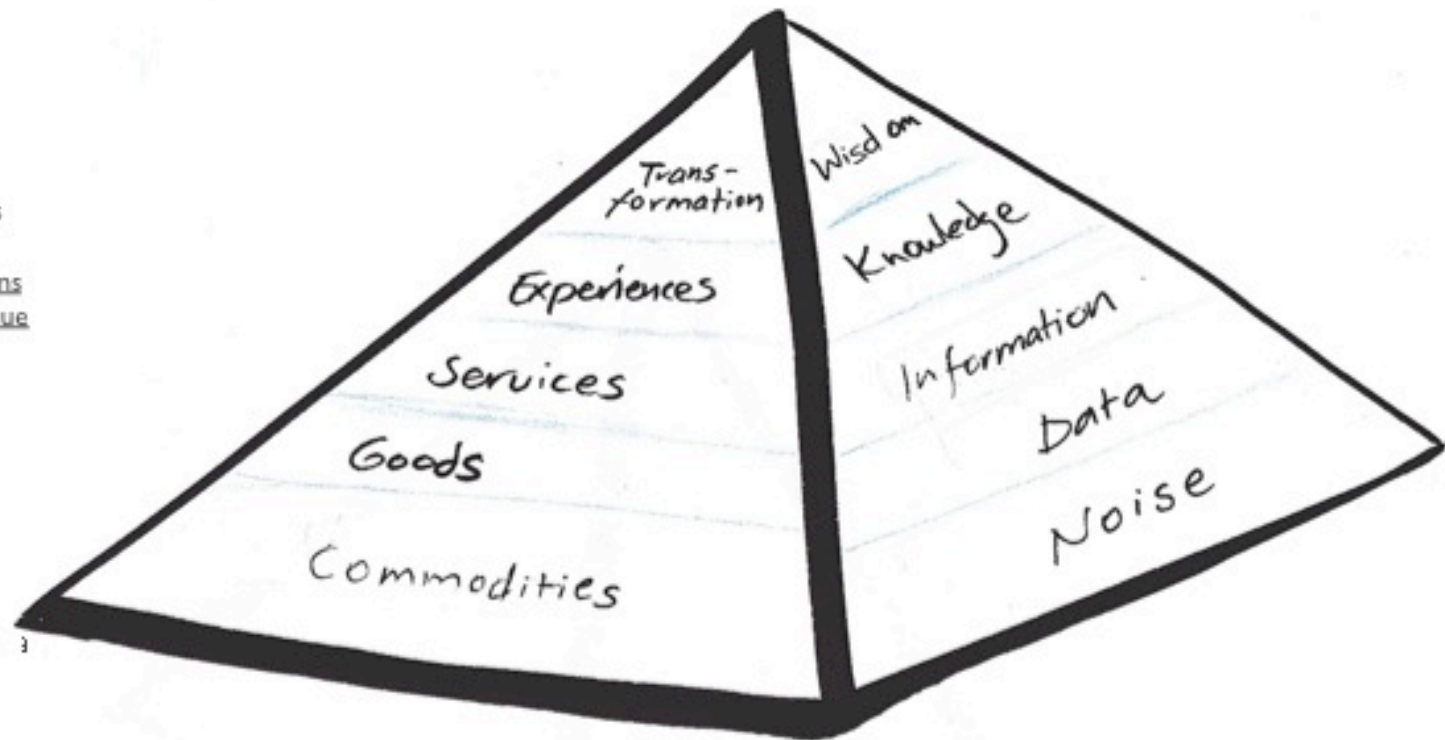
**Persistence is key to create a worthwhile offering. Henry Ford went bankrupt twice before Ford Motor Company became a success. Henry Ford said, “Failure is the chance to begin again more intelligently. It is just a resting place.”** <sup>2</sup>

## 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](#)



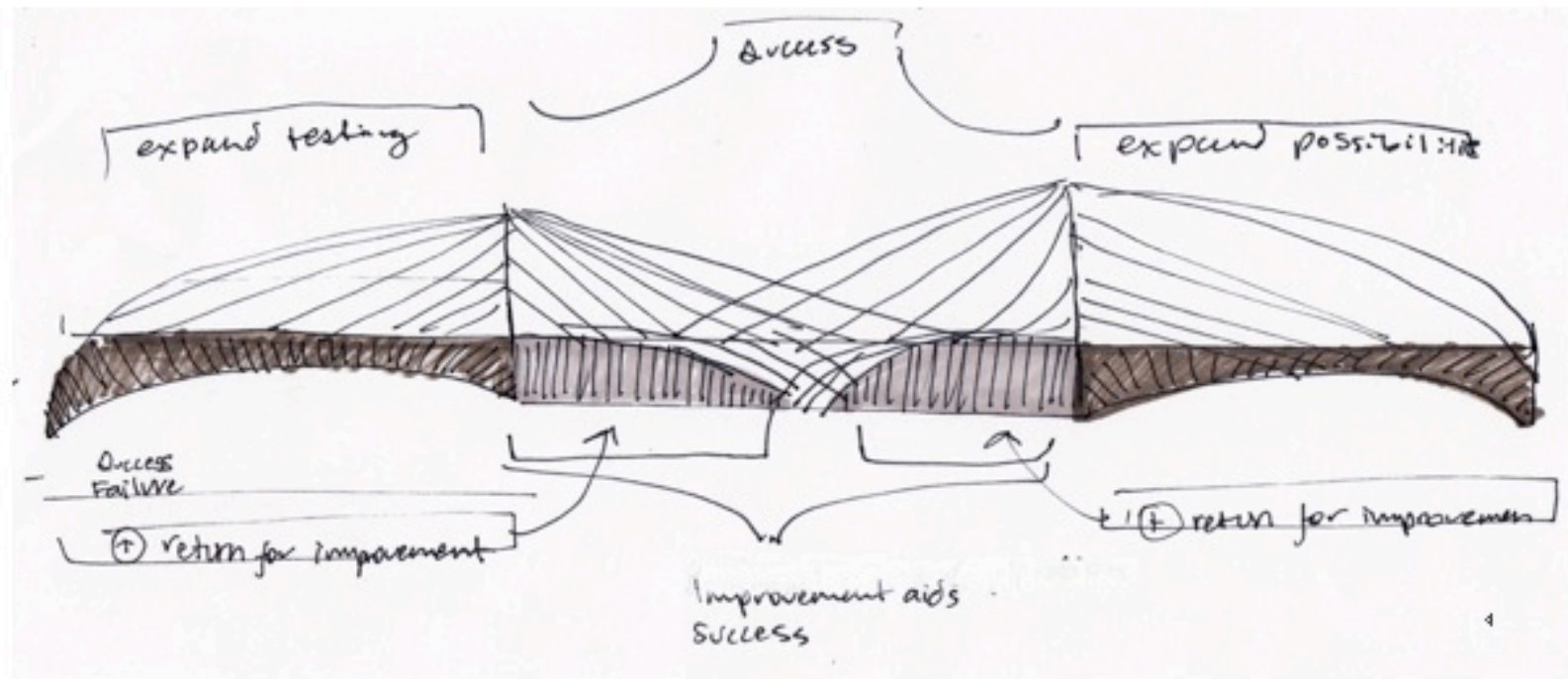
**Develop a strategy for effectively communicating a clear message to aid the user. Do not focus directly on the sell, but skillfully shed light to 'why' your offerings maximize needs and epitomize their desires (i.e. aid process, convenient, child-proof, less expensive with more benefits, and easy to 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.**

## Identify When

Frame the challenge by defining the scope of the project/period for research, collaboration, and analysis.

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.

Frame Challenge	Scope of project, industry, interest
Reason or Cause for Action	How does it relate to you, company, other offerings?
Exploration Period	What is your inspiration and methodology for discovering?
Reaction	How did the discovery process evolve after research? What kinds of expectations are your audiences expecting?
Change	As your project develops, how many stages of growth will you allow?
Purpose for implementation	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?
Presentation Document Process	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?

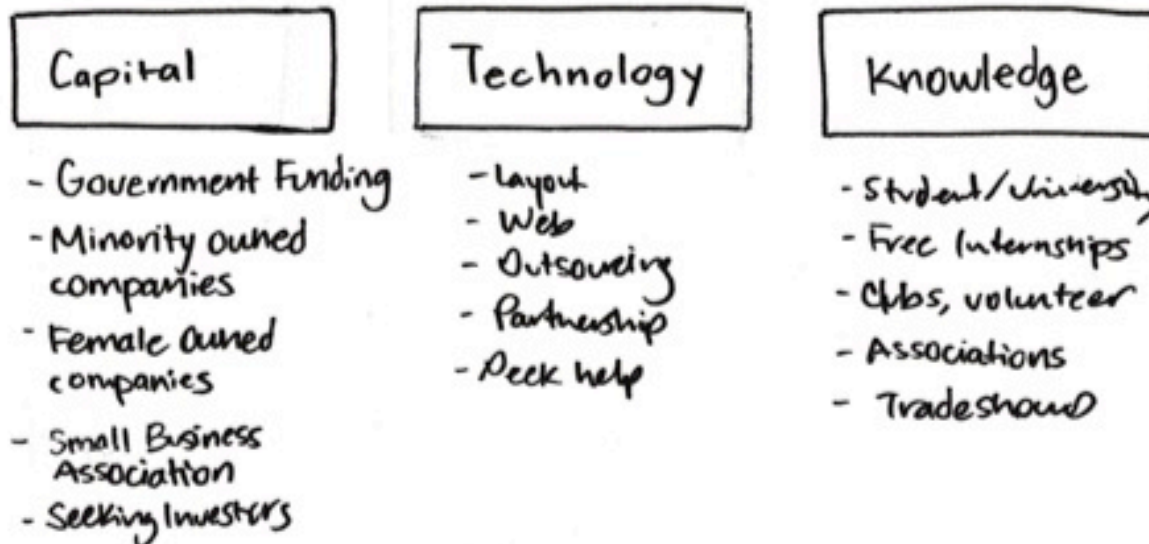
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**Structuring company presentation templates for personal exploration ahead of time will cause employees to manage their success from the start. A bottom-up exploration process inspires more people to enrich their perceptions, thereby increasing performance exponentially.**

## Identify Where

Seek inexpensive resources within your community

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.



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

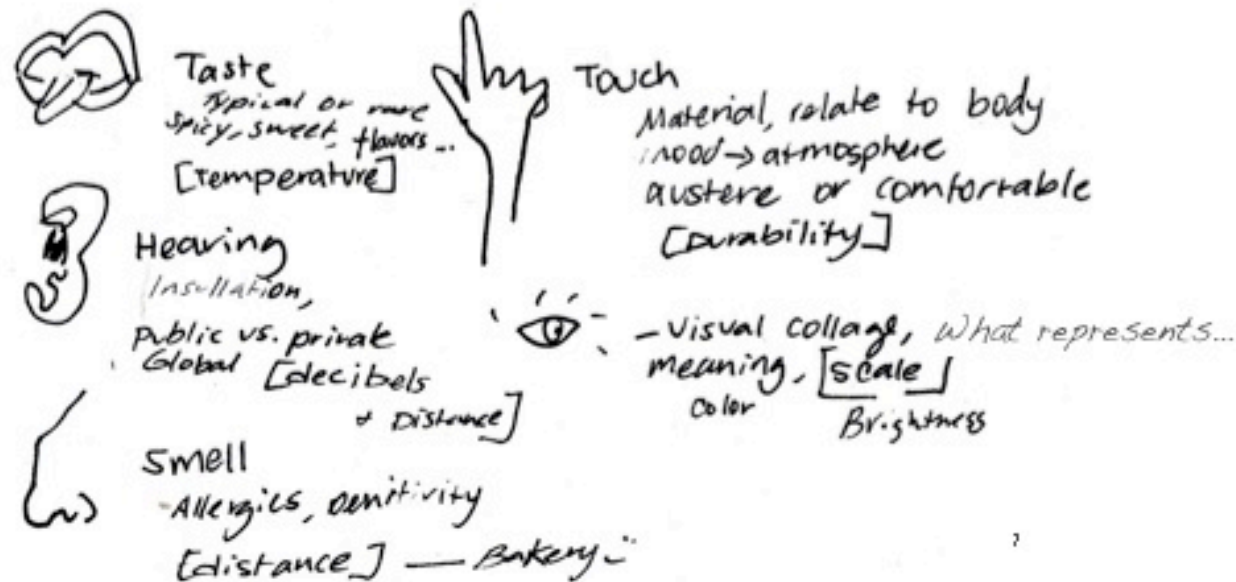


## Identify What

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



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.

# Ideate

## Inform Identify / Ideate

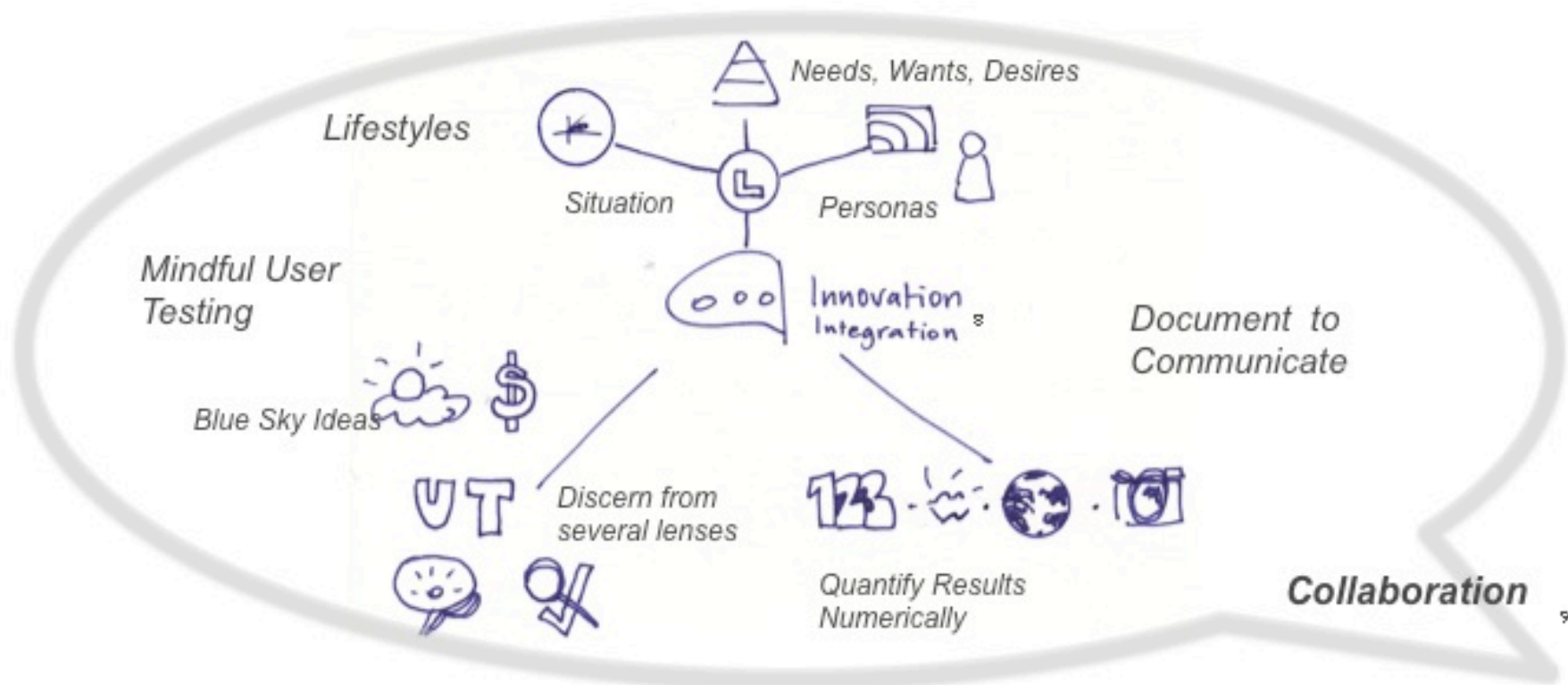
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## Ideate Purpose

Collaborate, identify, and document the customers' meaning of context

Facilitating innovation starts with understanding your customer's perspective by seeing why and how they establish meaning within particular situations.

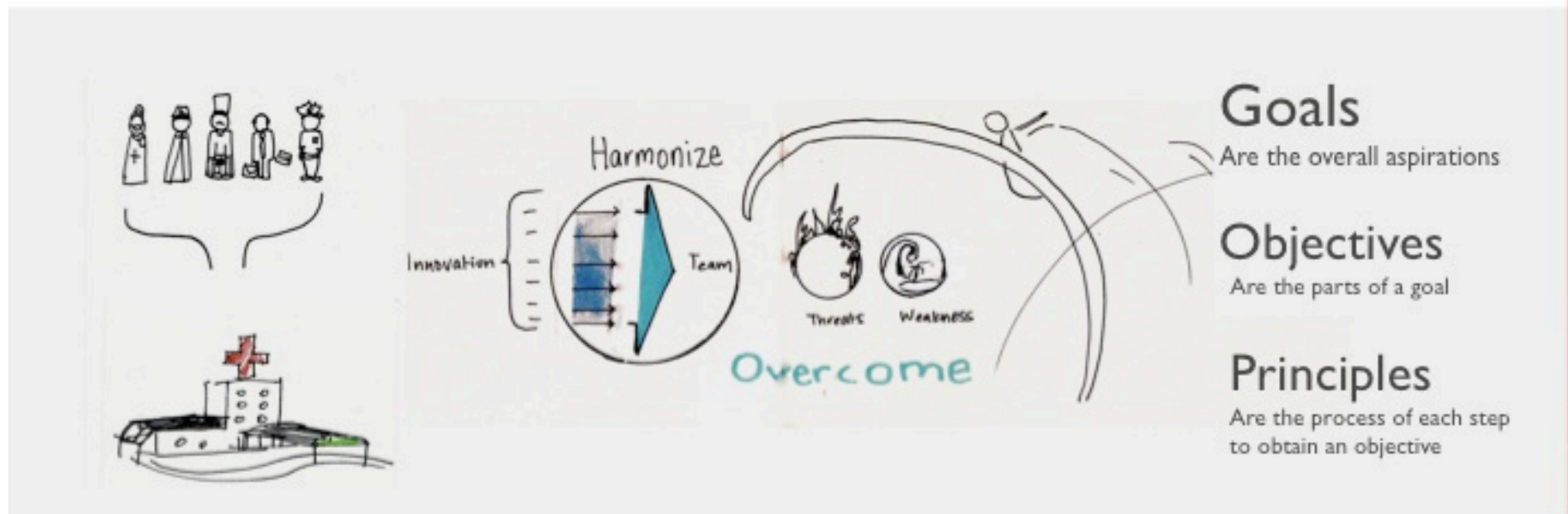


**As a team, set yourselves amongst the public and pick out potential customers. Engage and observe. Document findings.**

## 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.



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

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**Companies who collaborate and strategically adapt are more likely to succeed; knowledge and preparation are key for realizing additional revenues.**

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# Ideate Why

Meaningful offerings generate more money

Fuse services and features into your line that complement the characteristics of your customer. Uniting offerings that exceed customer expectations makes for brand superiority.

Diagram  
reference from  
Joseph Pine &  
James Gilmore's  
Experience  
Economy



Identification and confirmation of a successful offering will create brand equity.

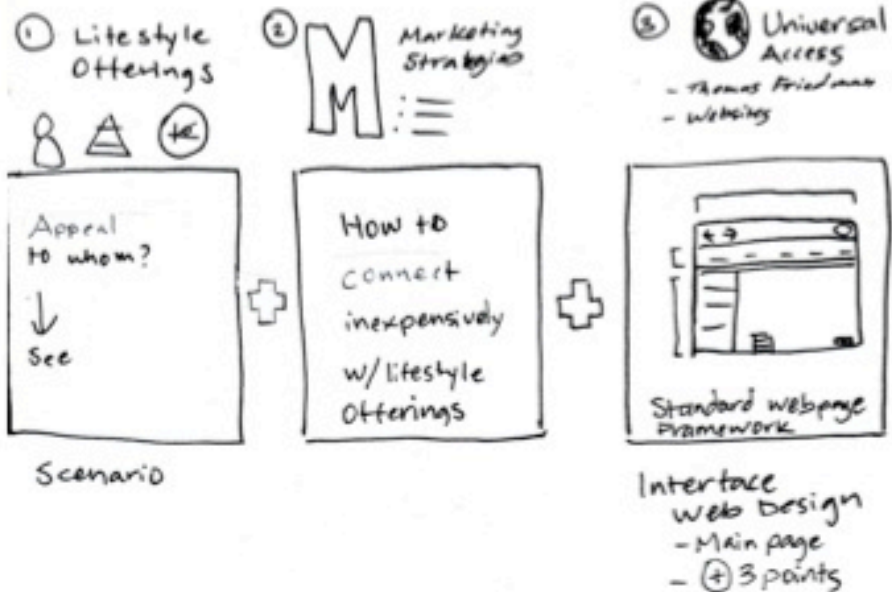
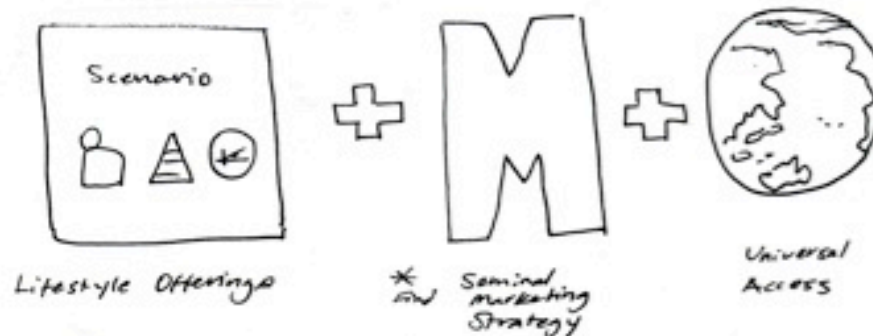


# Ideate How

Marketing lifestyle branding communicates globally

Leveraging complementary products to bundle, advertise, or sell will create brand identity. Packing an aura around your product can globally be experienced online.

## Package Offering Globally



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.

# Ideate When

Constant communication is key for cultivating rich data

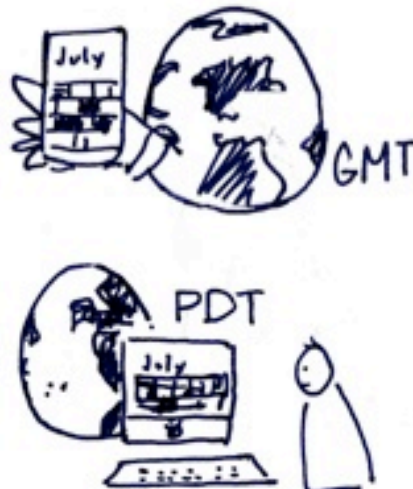
Have a central means of organizing and referencing milestones to ensure completion within the time frame.

## 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.**



# Ideate Where

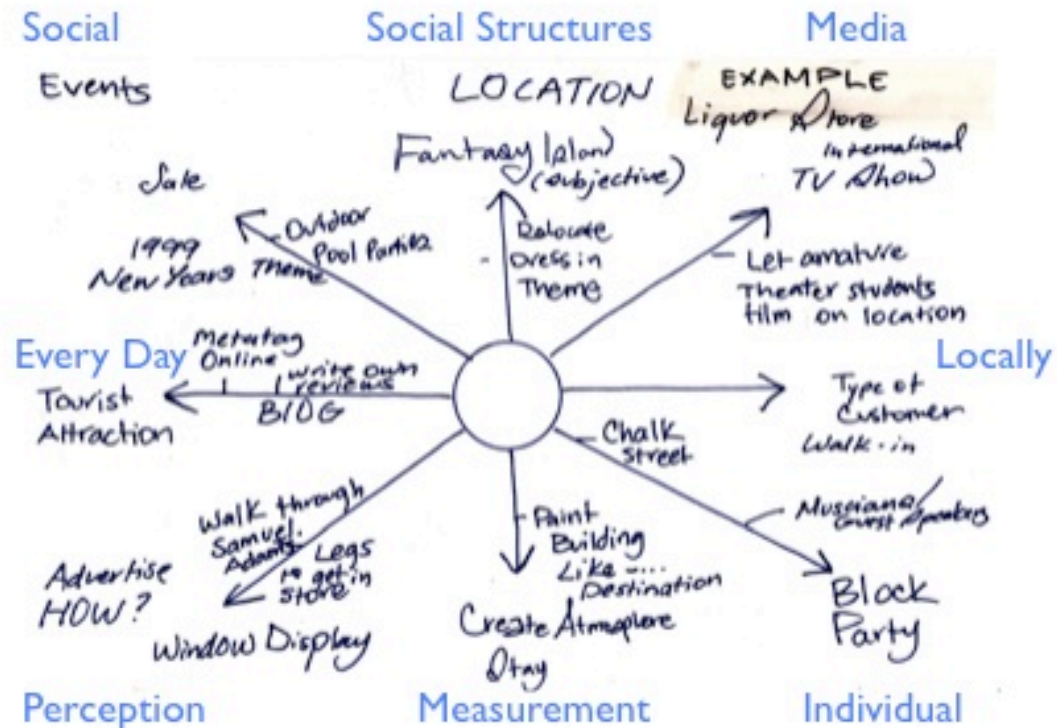
Ideate where universally imaginable, locally meaningful, and fearlessly communal

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...



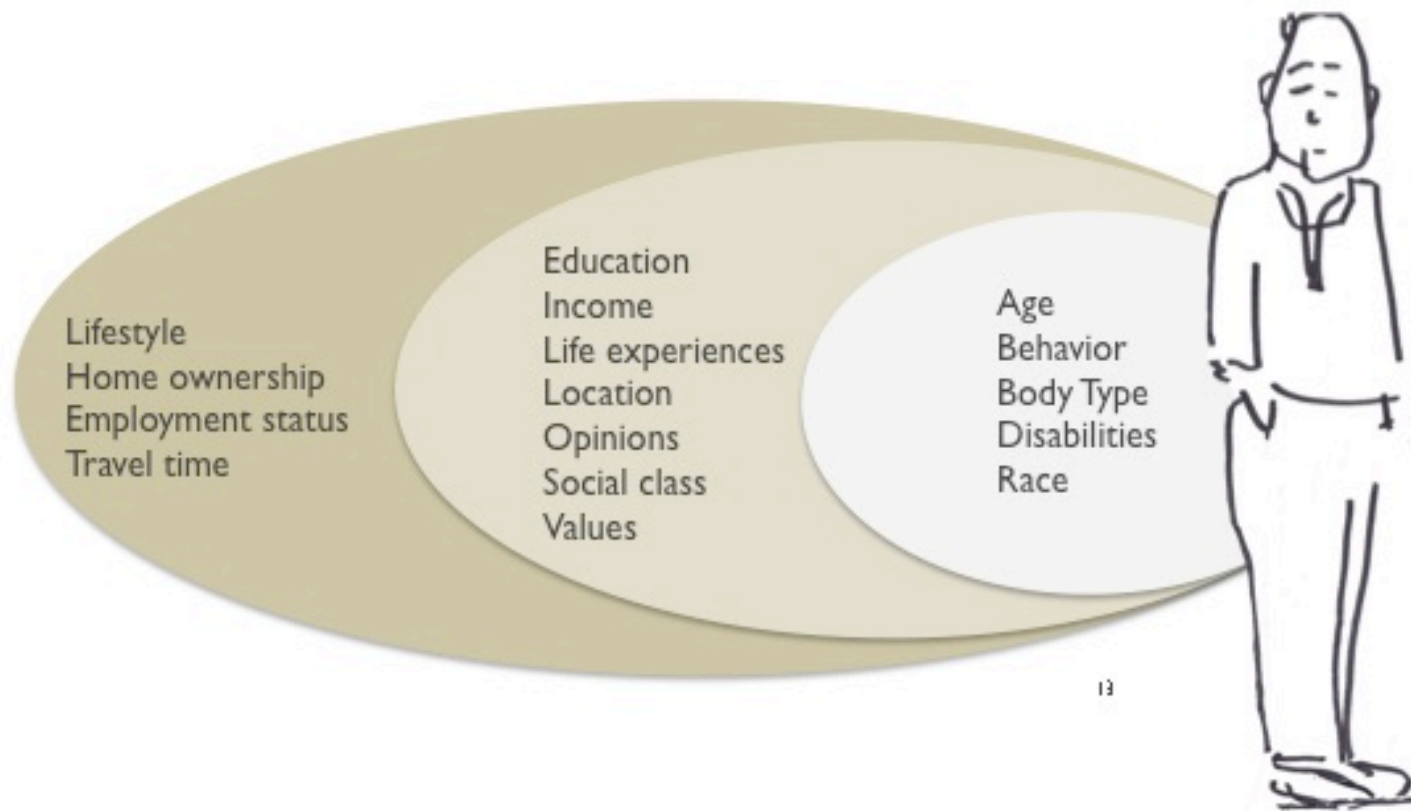
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Simulating a slice of your vision will excite the team and aid in deciding a course of action. Try expressing thoughts quickly with a magazine collage. Collages instantly communicate atmosphere, mood, meaning, and artifacts through color connotation, 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. <sup>14</sup>

# Expand

Interact / Improve

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# Interact

**Expand**

Interact / Improve

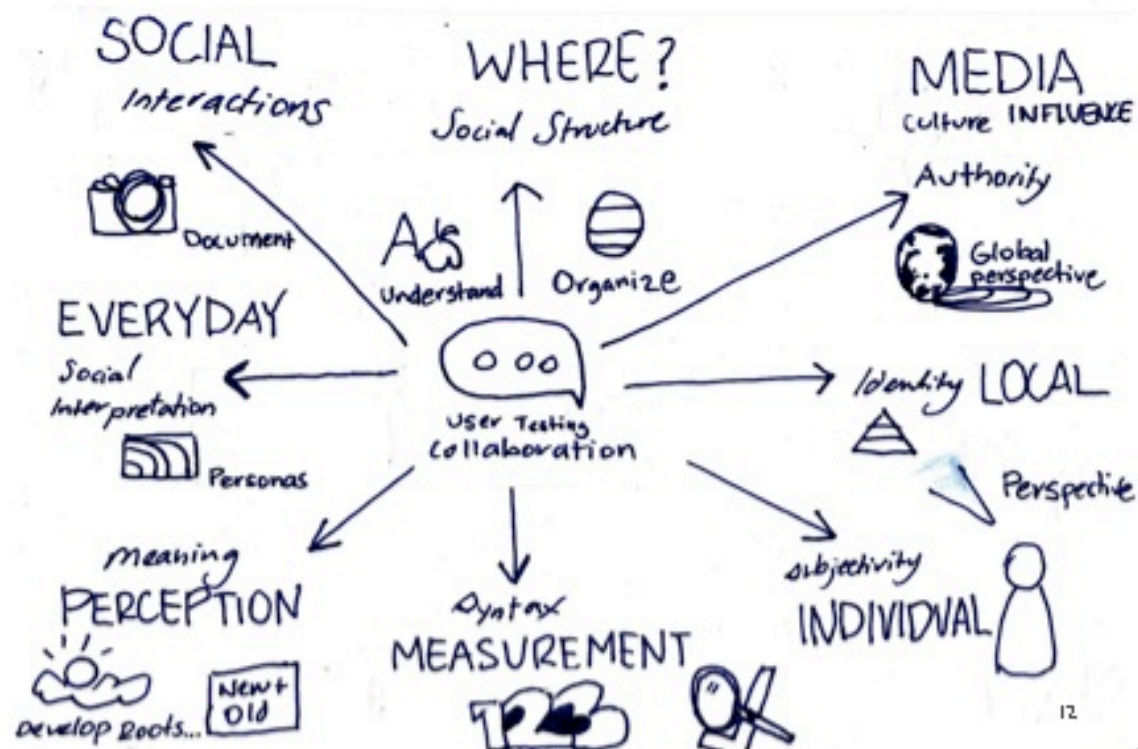
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# Interact Purpose

Adapt to explore holistically

Forecast panoramic ideas that integrate a hybrid of ordinary to extraordinary offerings relating to modern concepts and masterpieces.



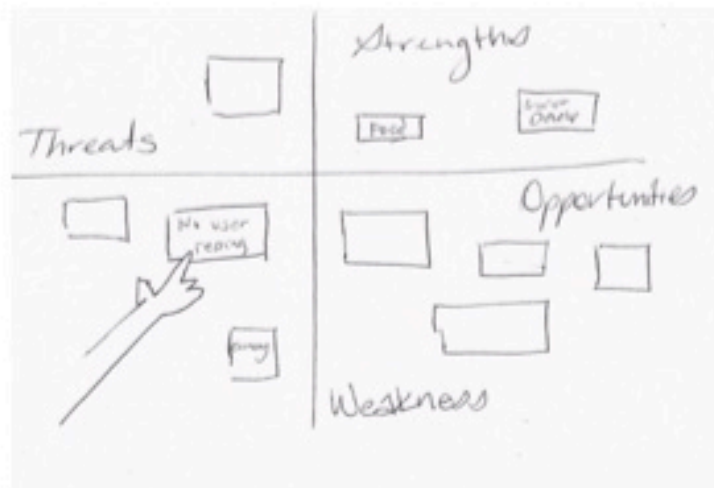
Constantly define parameters, relevant to your company... "where" can you identify lifestyle attributes? Don't wait to follow trends when your capable of learning more about your customer in less than an hour; directly relate to your customer.



## 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

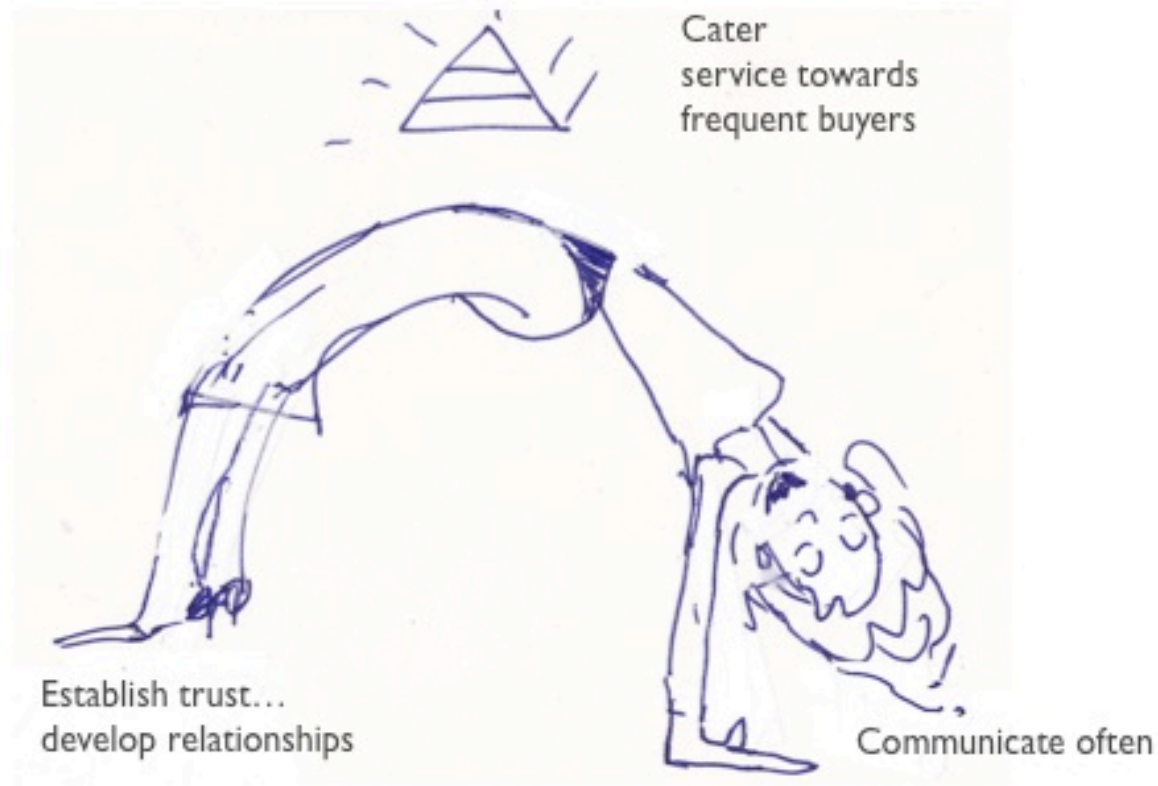
- Competitive weakness
- Demographic trends
- Diversification
- Globalization
- New products/ market segments
- Partnerships
- Barriers to market entry
- Demographic trends
- Economy changes
- Industry trends
- Product/ market life cycles

**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.** 16



## 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.

<b>Step 1</b>	<b>Ask Integrative Questions</b> WHO WHAT WHERE WHEN WHY HOW	→ Categorize thoughts and see overview relationships of ideas and people: -Alone, privately, socially, publically -Environments, elements -Extreme, unique, somber, surprise -Fear, Happiness
<b>Step 2</b>	<b>Error Identification</b> At what points are there: - Troubles - Time delays - Voids in the process	→ Identify distinguishing points where actions and activities disjoint.  → What is the conditional cause for interruption or success?
<b>Step 3</b>	<b>Meaning Percentage</b> What is the cause for acting? What is meaningful and relevance at pivotal times?	→ When communicating, make sure to analyze findings in an explicit format of measurement.  → Agree with your teammates a mutual way to evaluate intangible experiences.

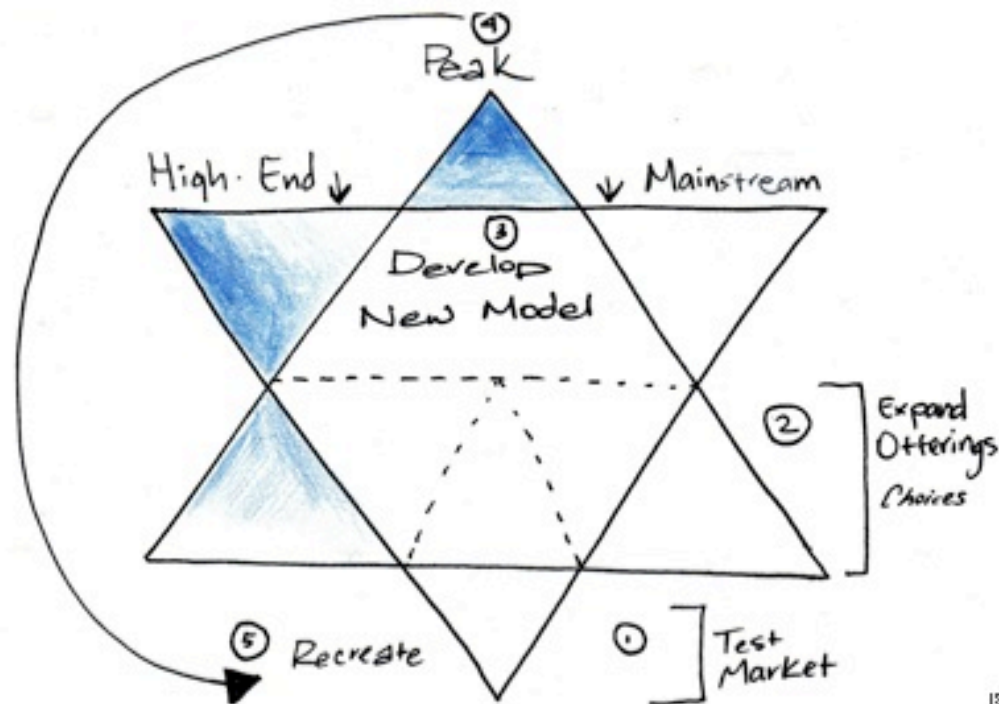
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**Who indirectly or directly shapes your industry? Discuss with the group and interact with the public.**

## 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.

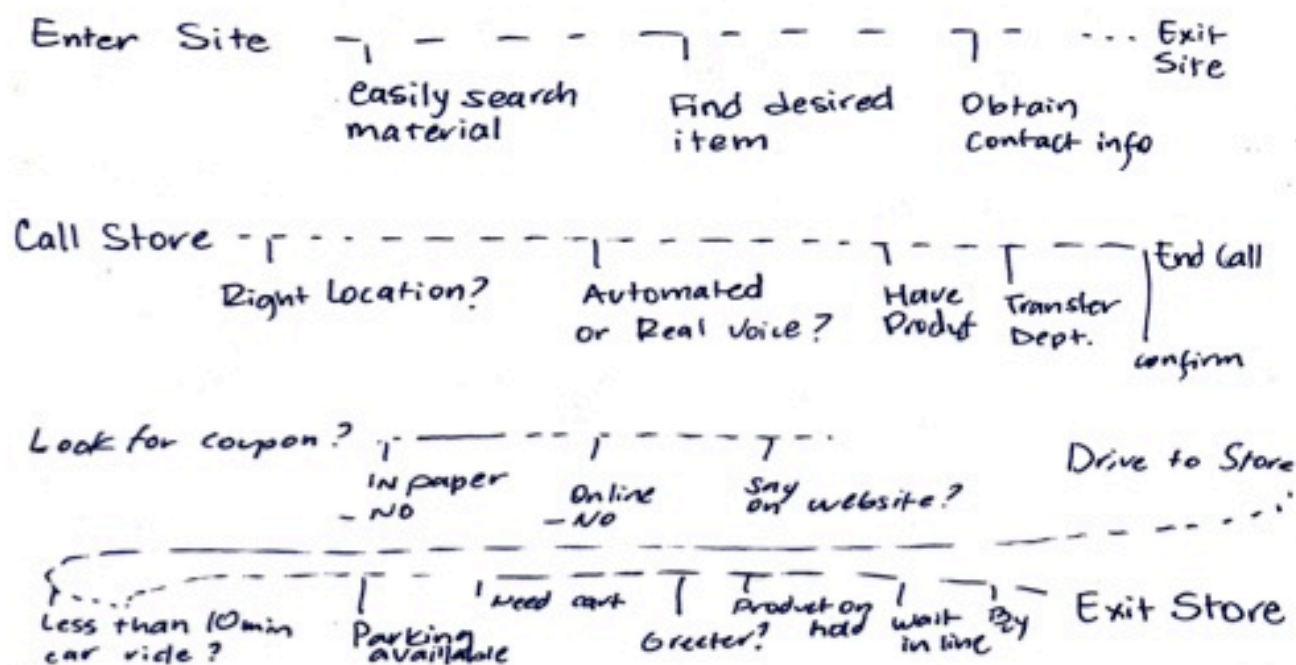


Integrate customers in your development from the start. Prepare an action plan on 'how to' achieve your next phase.

## Interact Where

Enhancing user experience at all touch points

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.



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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'.

# Interact What

User testing methodologies worth remembering

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.

<b>Observer from Afar</b>	<b>Participate</b>	<b>Integrate</b>
<b>Fly-On-Wall</b> <i>Stake out a public place and observe your customers interact. Unknowingly people will let down their guard and expose themselves to subconscious reactions.</i>	<b>Day-in-Life</b> <i>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.</i>	<b>Trial Testing</b> <i>Have users test out your offering and provide feedback</i>
<b>Spatial Pattern</b> <i>Record where people move around and for how long they: handle, congregate, or repeat similar actions to maximize utility.</i>	<b>Phone Calls</b> <i>Have willing volunteers allow you to call them at any point and describe what they are doing within the context.</i>	<b>Representational Models</b> <i>Have participants represent their perspective through relationship diagrams.</i>

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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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## Improve Purpose

A good concierge will receive an excellent tip for making a superb recommendation

Classifying unique customer desires will help your company to be knowledgeable and ready for delivery of high expectations.

### Persona



- Personal
- Social Groups
- Public
- Global

### Situation



- Activity
- Scenery

### Behavior Patterns

- Moods
- External Influences
- Formality



Ted went out on the town in Dallas. He made sure to hit up all the bars and watch the Mavericks Game. Wearing his favorite hat, he hoped to see Willie Nelson, or other stars that frequent the Hard Rock Cafe. Disappointed he only saw a statue of a cowboy, Ted came home with just souvenirs.

Concierge could have told Ted where and what to do. Ted really should have gone to Ft. Worth.

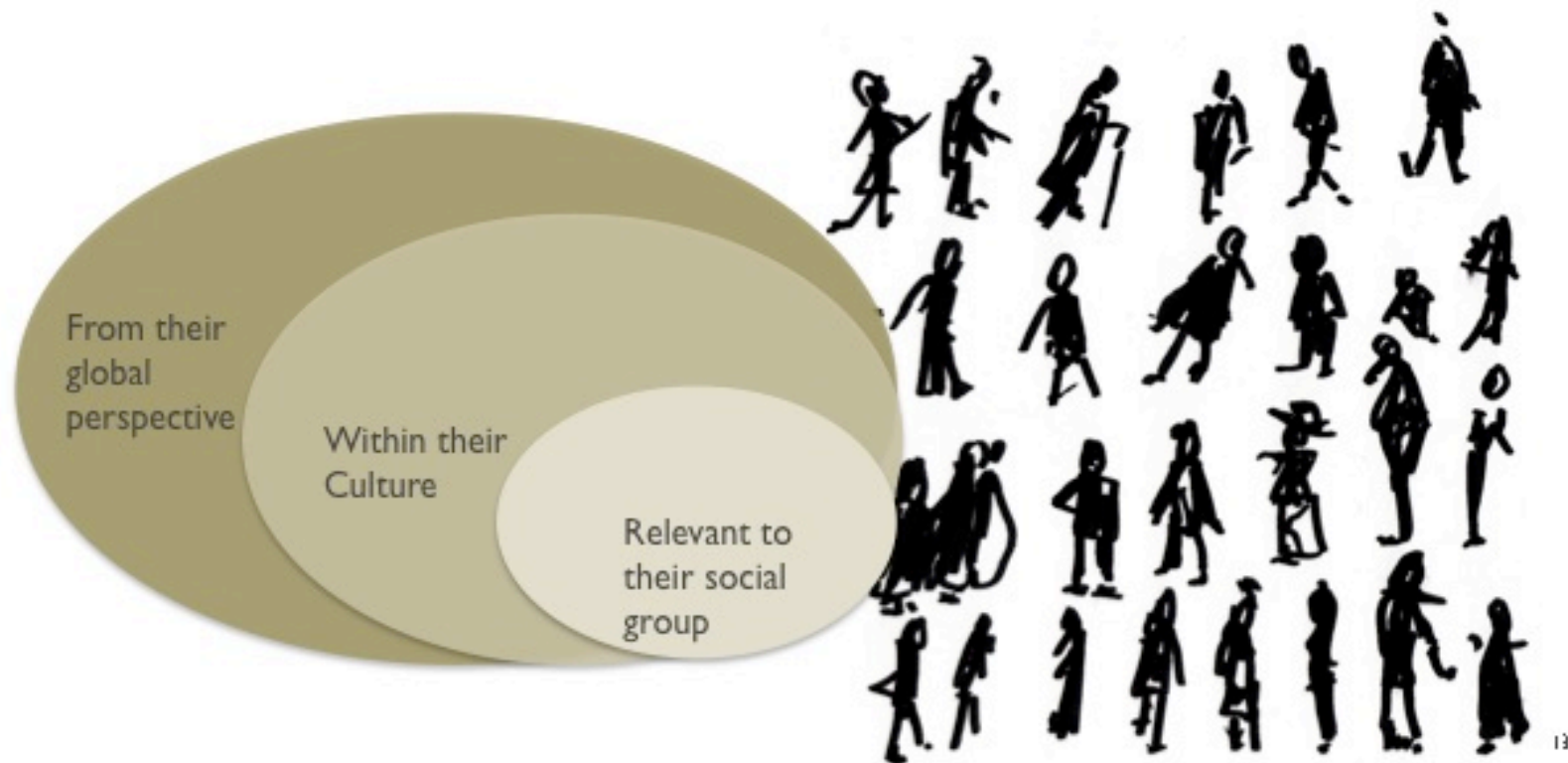
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User testing scenarios will define what changes should be applied to sway customers moods, thereby enabling them to spend more, stay longer, become loyal, or just flat out leave.

## Improve Who

Visioning for multiple view points

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.



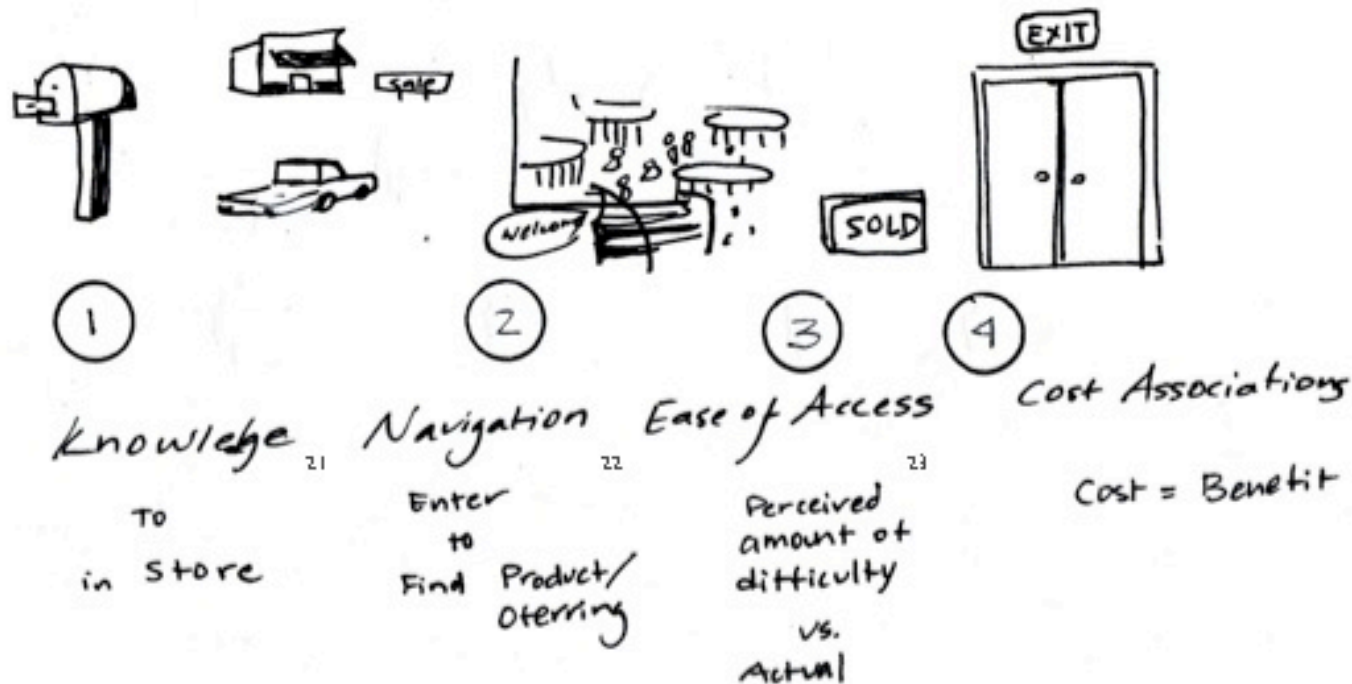
**Meld improvements based on discovering the motivating factors for similar oddities, cause and effect behavior responses in particular situations.**



# Improve Why

Nurturing detailed parts from start to finish conveys the big picture

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.

# Improve How

Mandatory collaborative feedback ensures usability

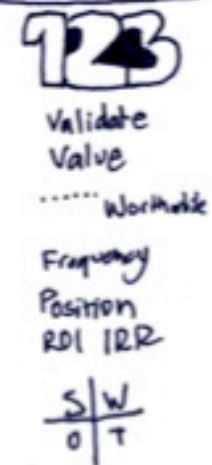
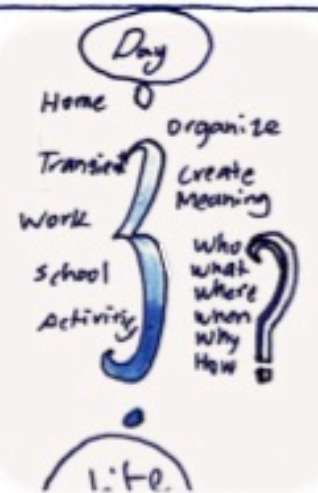
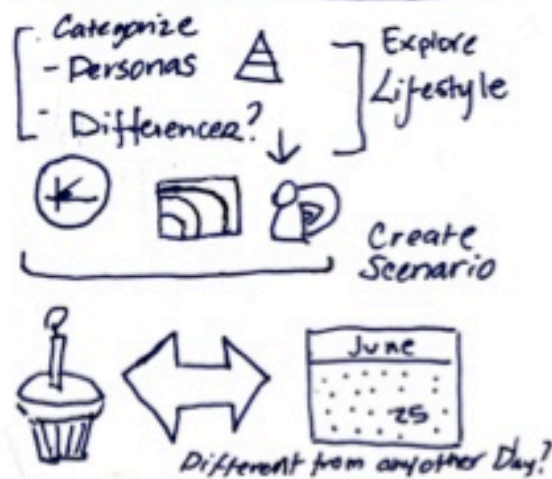
Incorporating customers into your discovery process can be helpful in validating each of your collaboration phases: observation, participation, and implementation. Before finalizing your insights to a deliverable, consult previously filed tests to verify that your research is correct.



Test General Ideas

Meet & Connect

Retine Goals & Execute



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

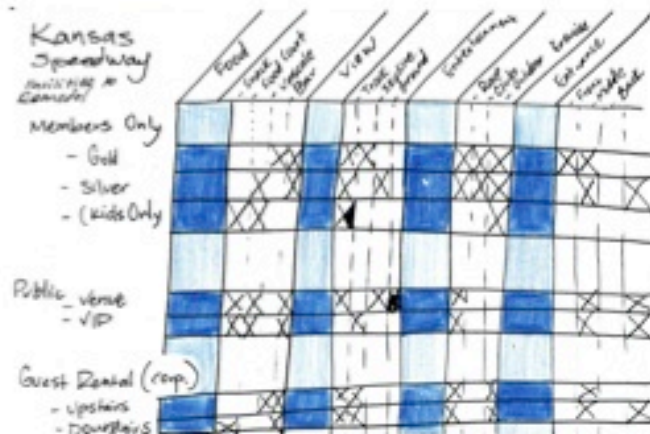
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Learning to read body language will help you perform the delivery of a service effectively.

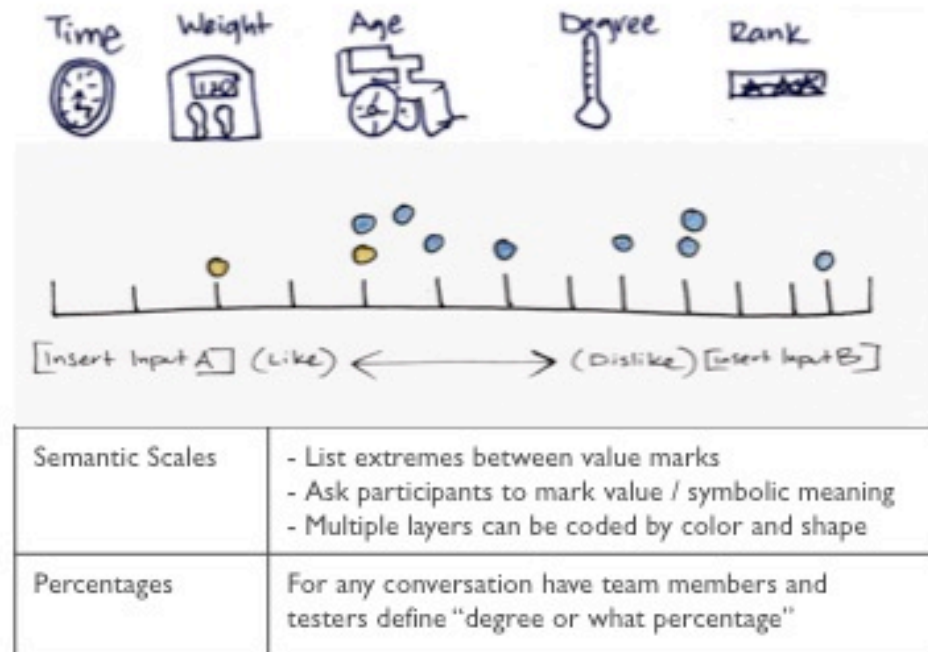
# Improve Where

Research. Ask customers to supplement an explanation with a quantifiable value

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.



**Loyal customers use your offerings frequently, their latent perspective will manifest explicit opportunities.**



# Improve What

## Triple the Check

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.

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



# Deliver

Implement / Integrate

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# Implement

## Deliver

Implement / Integrate

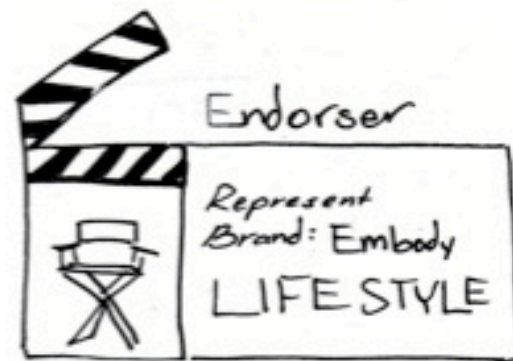
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## Implement Purpose

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.



- o Knowledge
- o Member of Associations
- o Seal of Approvals



- \* Investigate further on ways to establish perception.

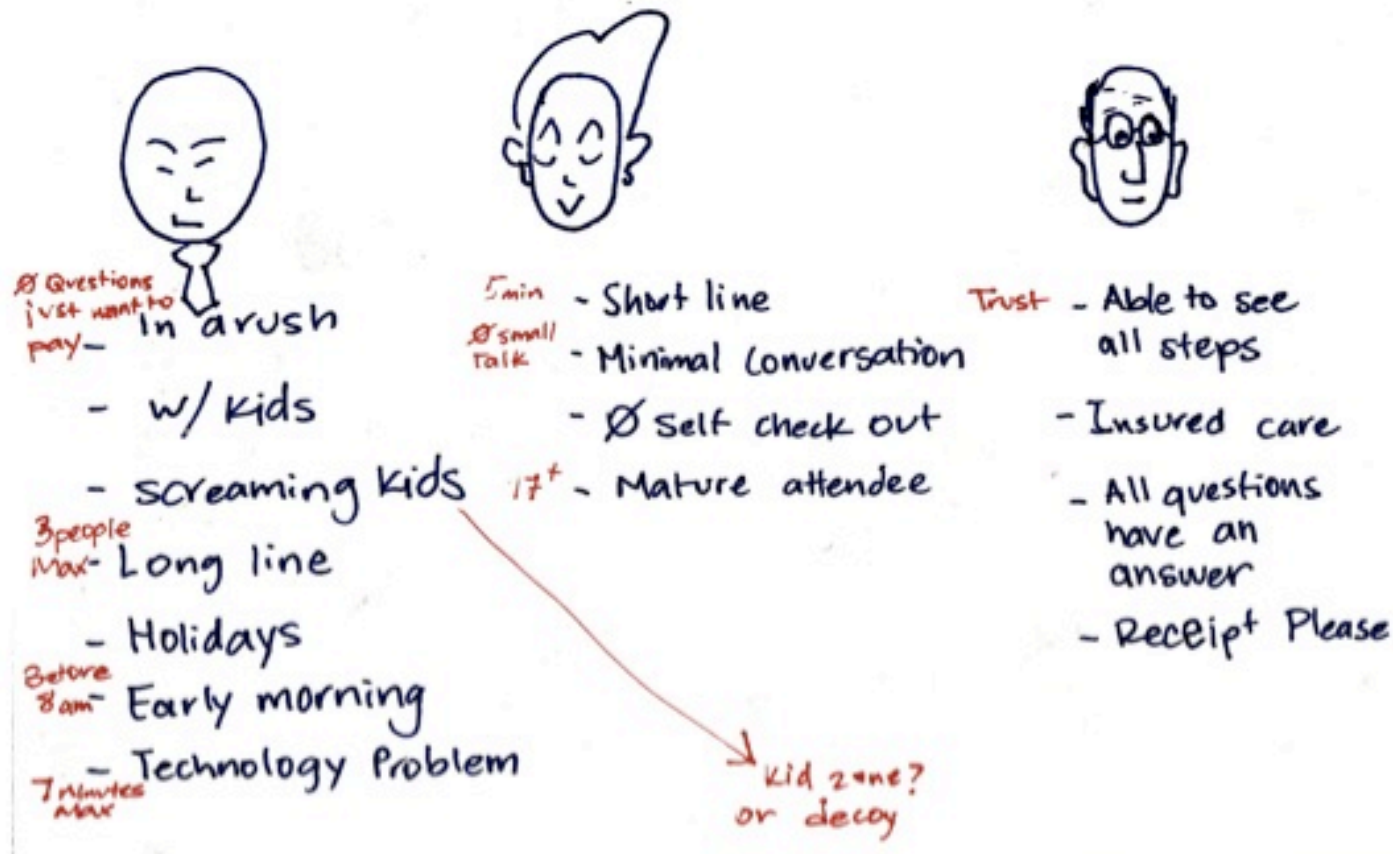
How do you want your company to be viewed?

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.

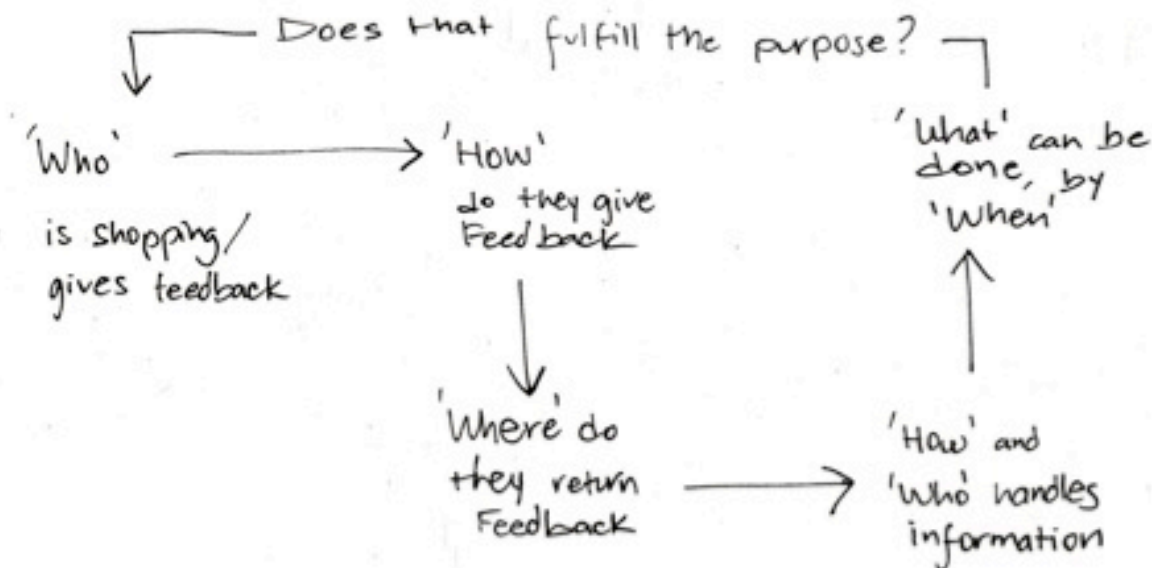
- Look up Ed Hardy: [http://www.donedhardy.com/about\\_us.html](http://www.donedhardy.com/about_us.html)
- Ed Hardy by Christian Audigier, is a trendy brand that coils its image around celebrities, advertising the lifestyle glamour. Ed Hardy, uniquely exemplifies how to embody a set of customer's beliefs, 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.*

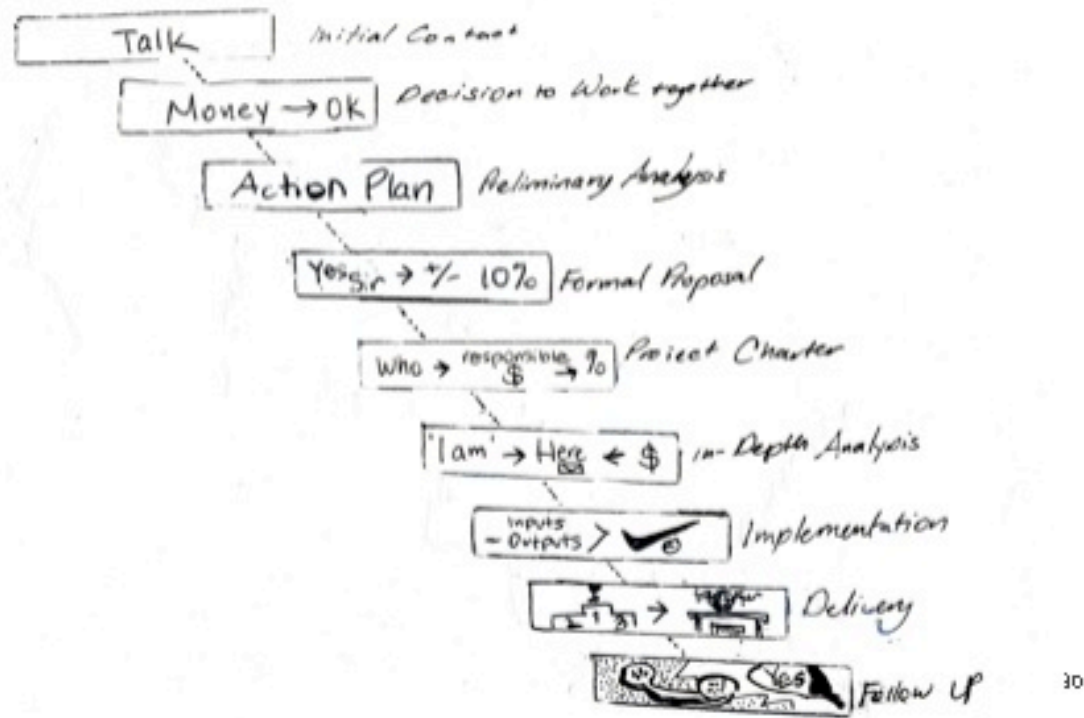
29

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. <sup>16</sup>

## 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.

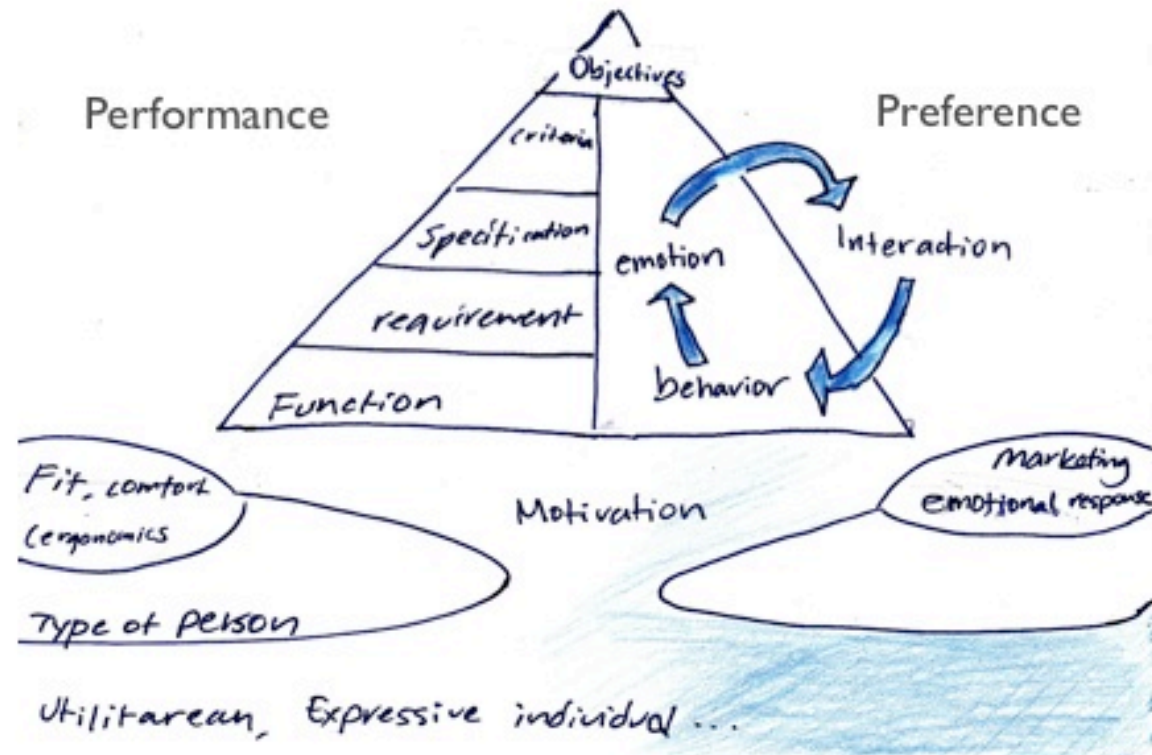
Business Plan Contents	Main Points of Consideration:	Details Include:
<b>Most Meaningful Points to convey within the first page</b>	For an investor: -Executive summary, Management team, Financial Projections: Cash flow & ROI -How fast do you plan to sell your company	-Service Industry -Markets to attend? - Knowledgeable employees or just leader? # employees, growth, experience
<b>Executive Summary</b>	-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
<b>Financial Information</b>	-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
<b>Website Links</b>	Small Business Administration <a href="http://www.sbaonline.sba.gov">www.sbaonline.sba.gov</a> Business Plan Preparation Center <a href="http://www.bizplanprep.com">www.bizplanprep.com</a>	-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.



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

# Integrate

## Deliver

Implement / Integrate

Innovation  
transformation®

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



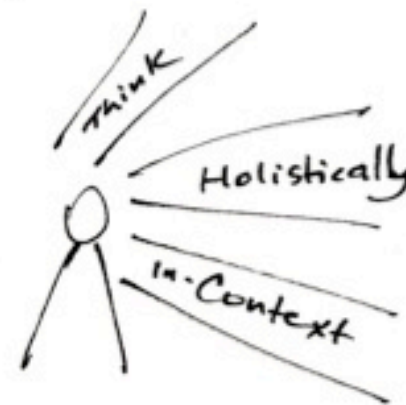
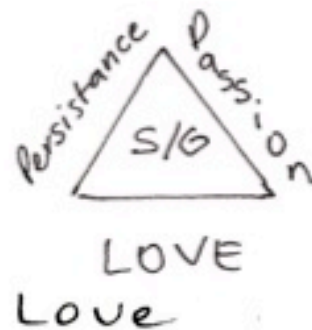
# Integrate Purpose

Adapt meaning and provide incentives for all to thrive

Starting: Silver-Gerald

Defining relevant offerings for older users...

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

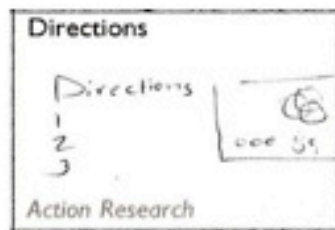


① Vision for Team Includes

② Agree to work well together  
 $1+1=3$

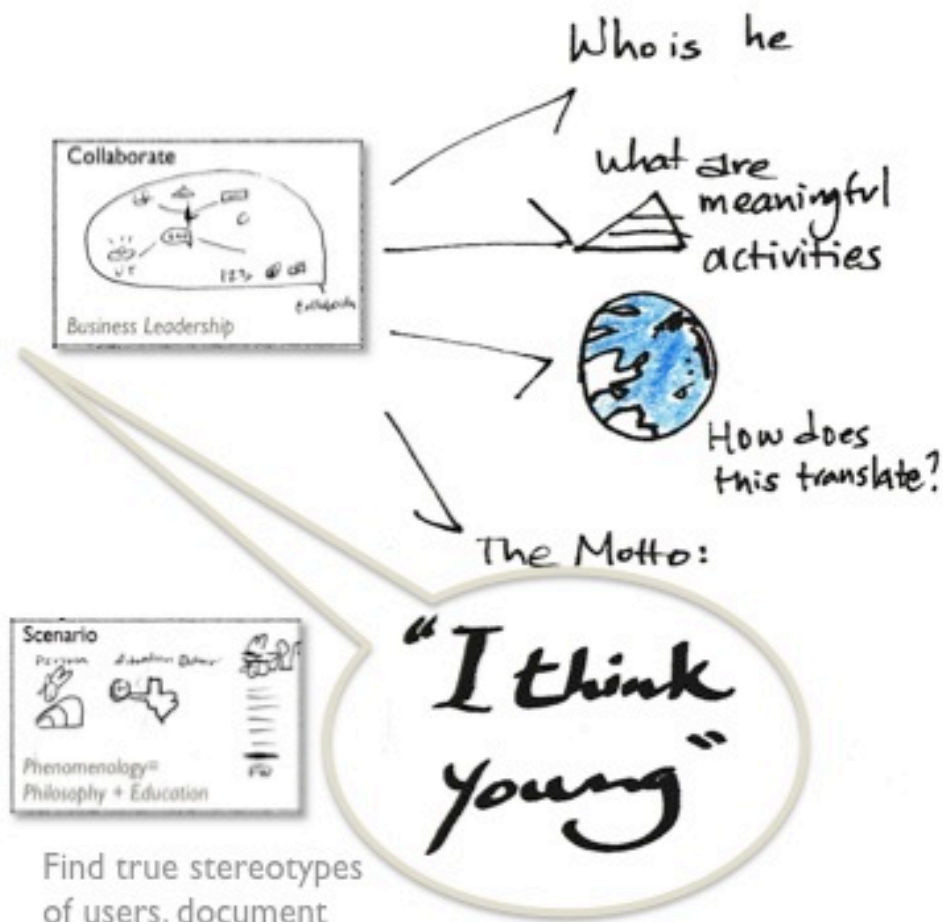
③ Identify an archetype Customer(s) (unbiased/honest Feedback)

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Identify Directions to Integrate Interpretation for each situation

# Purposely: Think fresh with each situation



Find true stereotypes of users, document patterns of customer types

**Purpose:**

**General summary of thoughts**

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



# Integrate Who

Our business connecting with customers



VS.



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

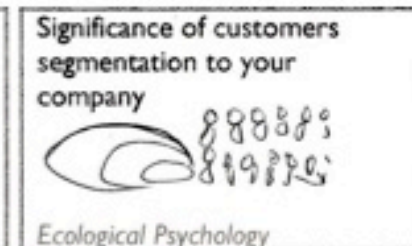
WHO is your current competition?

How do you differentiate?



**Who:**

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



# Integrate incentives for customers and employees

Silver H Gerald

## Goals Objectives Principles

- Open Communication** Small or Large Team
- Knowledge
  - Responsibility
- WHAT can "We"
    - do better
    - Learn next time
  - Listen
    - Be humble
    - Know when to apologize
    - change
    - work hard
- Build Team**
- Designate Roles
- Foster Ownership
  - Trust
  - Reward Performance
- Ask what can increase Team Building
  - Allow team to name shower chairs
  - Propose and fulfill goals
- Higher Return**
- Organize
- Efficiency
  - Simplicity
  - Routine
- Test → Refine → Revision
  - Learn → Design → Repeat

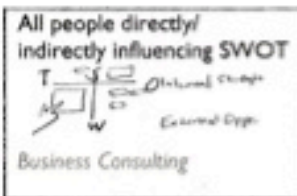


Silver-Gerald © 2008

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.

10



# Integrate Why

Applicable frameworks expedite efficiency



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

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## Why:

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

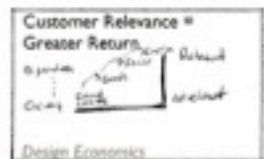
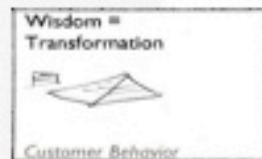
Does each part make sense to the common goal?

1



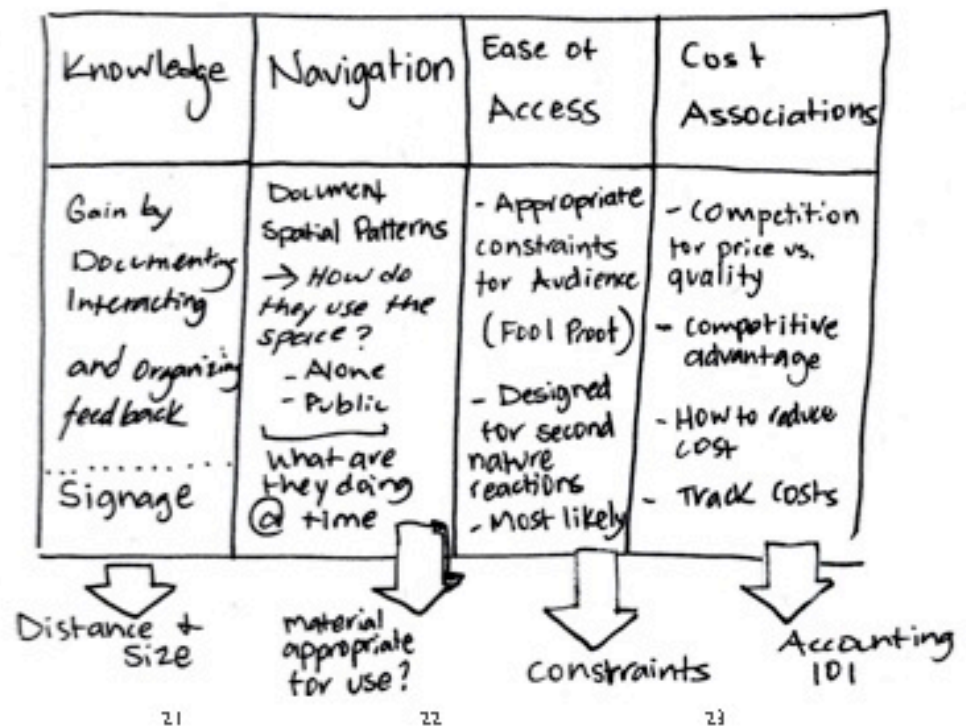
# Capitalize on intrinsic value

Get the big picture with few words...



Consider these properties...

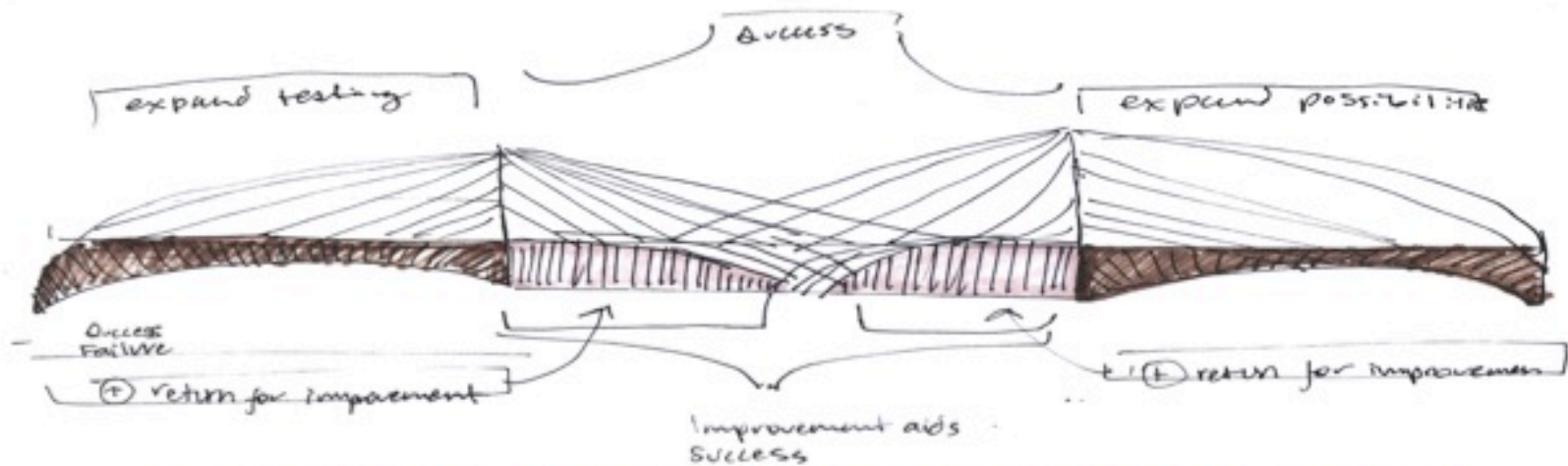
## Downtown Billboards



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

# Integrate How

To step outside the box



STEP

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



STEP

2

- Place ideas in context of a scenario of users: needs, wants, desires relevant to their lifestyle.
- Identify what cultural issues need to be addressed to appeal to a general crowd.
- Establish channels of distribution and sites to access your offerings.



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.



**1 Bibliography**  
 - List  
 - Current events  
 - Lifestyle  
 - Shows  
 - Magazines  
 - 100M Magazine  
 - Talk show  
 - Movie  
 10 resources


**2 Masterpiece Attributes**  
 How do they relate  
 Form, function, aesthetics?



**3 Generate ideas w/ 2 qualities**

**4 Cross Reference back to bibliography - Would they accept?**

**5 Proper Prior preparation prevents piss-poor performance**  
 (rate ideas)  
 (A) Logical (B) Amount of work needed

1 Ellen: Witty, pantsuits  
 2 Martha: Feminine, Hostess, Delicate  
 3 V. Beckham: Sharp,  Modern Family  
 4 Ralph Lauren: Solid colors, bright, stripes, black, <sup>neutral</sup>  
 5 Graduate (Movie): Cheetah, scenery, vintage, lust  
 6 Roy Lichtenstein: bold colors, dots, pop art  
 7 Reese: colorful, sharp, delicate, fragrant  
 8 Ivaq War: expensive,   
 9 Rubbermaid (competitor): clear bottom, blue top  
 10 Mom: busy, dishwasher safe, inexpensive

- canopener handles w/ legs  
 - egg whisk shaped like woman's body  
 - Tupperware shaped (+) colored like a handbag  
 - Cheetah print plastic utensil  
 - Palm tree dust feathers  
 - Glassware w/ pop art (glass beads) ..... Possibly need more details - great  
 - Fragrant displays  
 - Containers for kids lunch looks like a grenade  
 -  Diner plates that fit in cupholders Shaped like a heart.

Yes  
 Yes  
 ~~It~~ unless it was functional. Color ok / ~~shape~~  
 Body shape w/ spots → Yes!  
~~It~~ in green. No marks  
 For keys but what @ girls?  
 will they spill?

	(A)	(B)
1)	8	2
2)	9	2
3)	4	8
4)	8	4
5)	1	2
6)	3	8
7)	0	
8)	5	2
9)	2	
10)	0	5

Literary and cultural influence possess 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

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# Expand

- 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.

14

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

# Inform

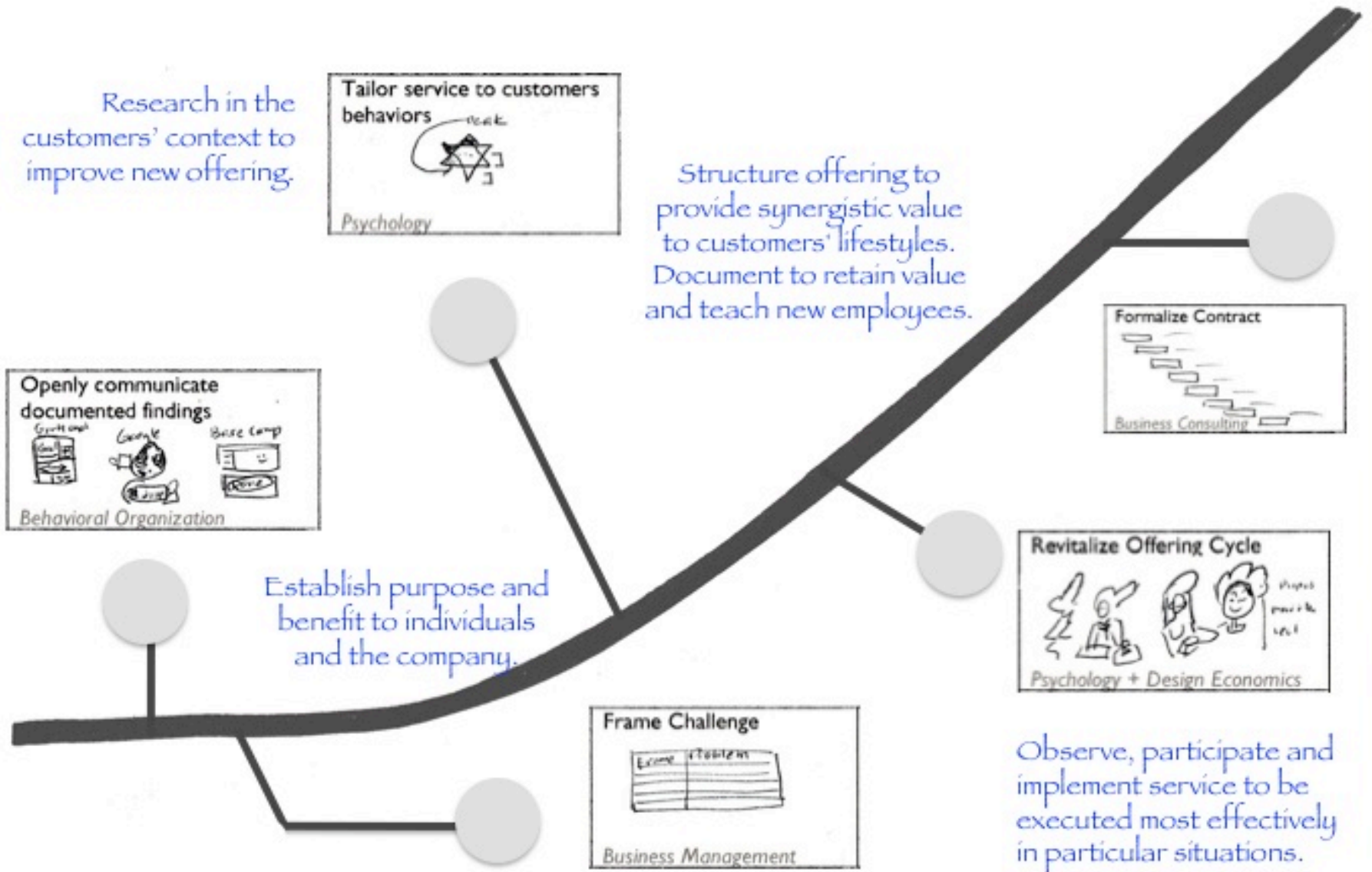
# Deliver

- 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

- 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.

16

Connect with customers in the creation, maintenance, and revaluation of viable opportunities





# Integrate Where

Leveraging Latent Assets

KNOWLEDGE

## 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*



What assets are available to your team within the community and industry?

## Interviewed Experts

**Drive Medical Supplier:** Largest Shower Chair  
Manufacture/ 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 Manufacture): 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

# Be aware of your surroundings and open to change

## KNOWLEDGE *Continued...*

### 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

## CAPITAL

### New Venture Winnings

Untouched

½ Jana's Paycheck

Ann's Oil Painting \$

Ann's Opportunity Cost

Brett's Sweat Equity

**Ability to say "NO" to  
Retail Therapy**

## TECHNOLOGY

### Organization

Documents

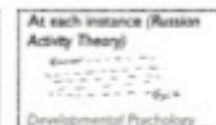
Online Website

### Modeling Plans

### Prototyping

Thermal Folding

### Manufacturing

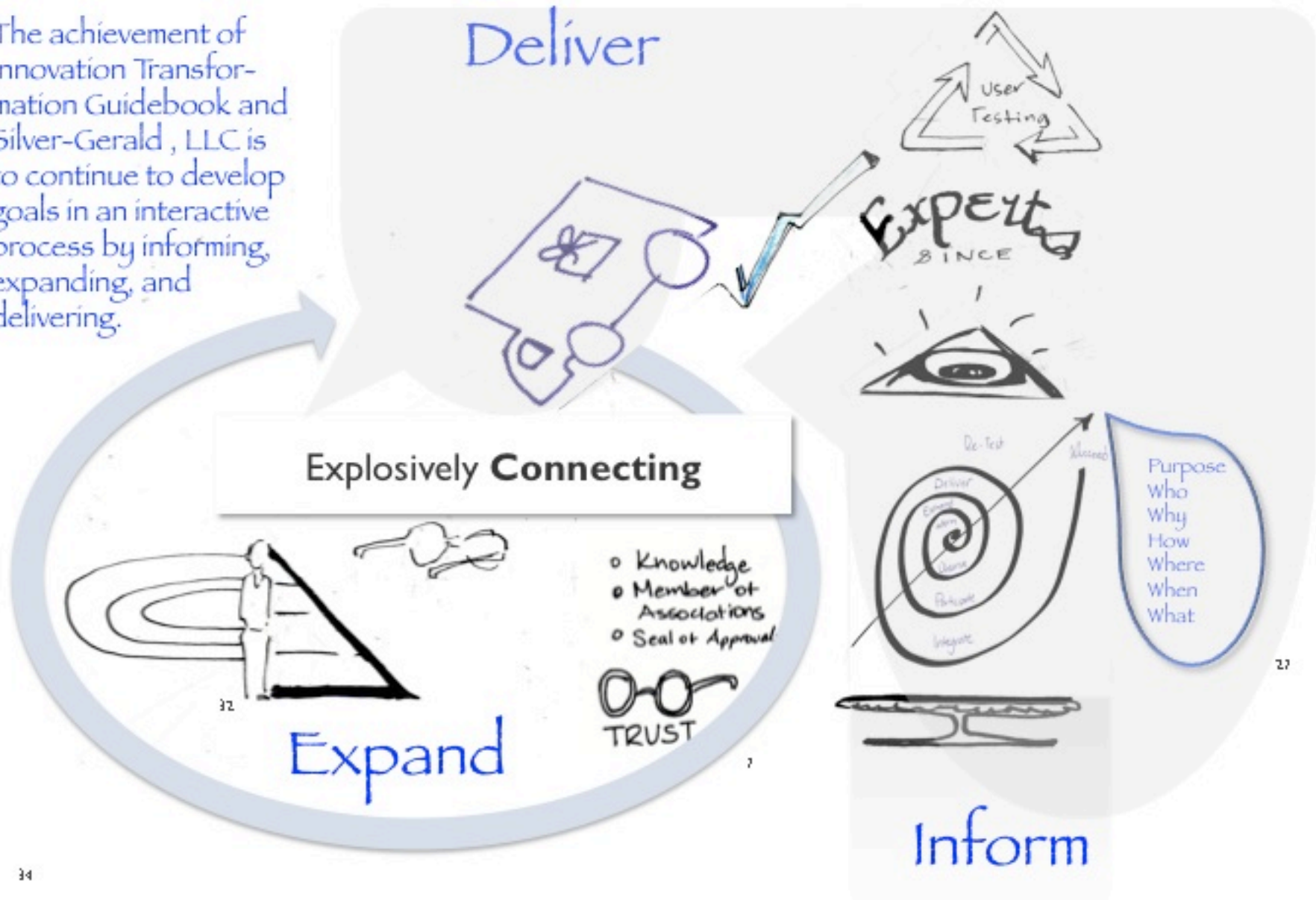


With less than \$5,000 dollars Silver-Gerald was able to holistically find alternative solutions for learning about the medical device industry in ten months. Simply making a phone call opened up an opportunity to visit industry experts in medical device materials in Massachusetts.

# Integrate What

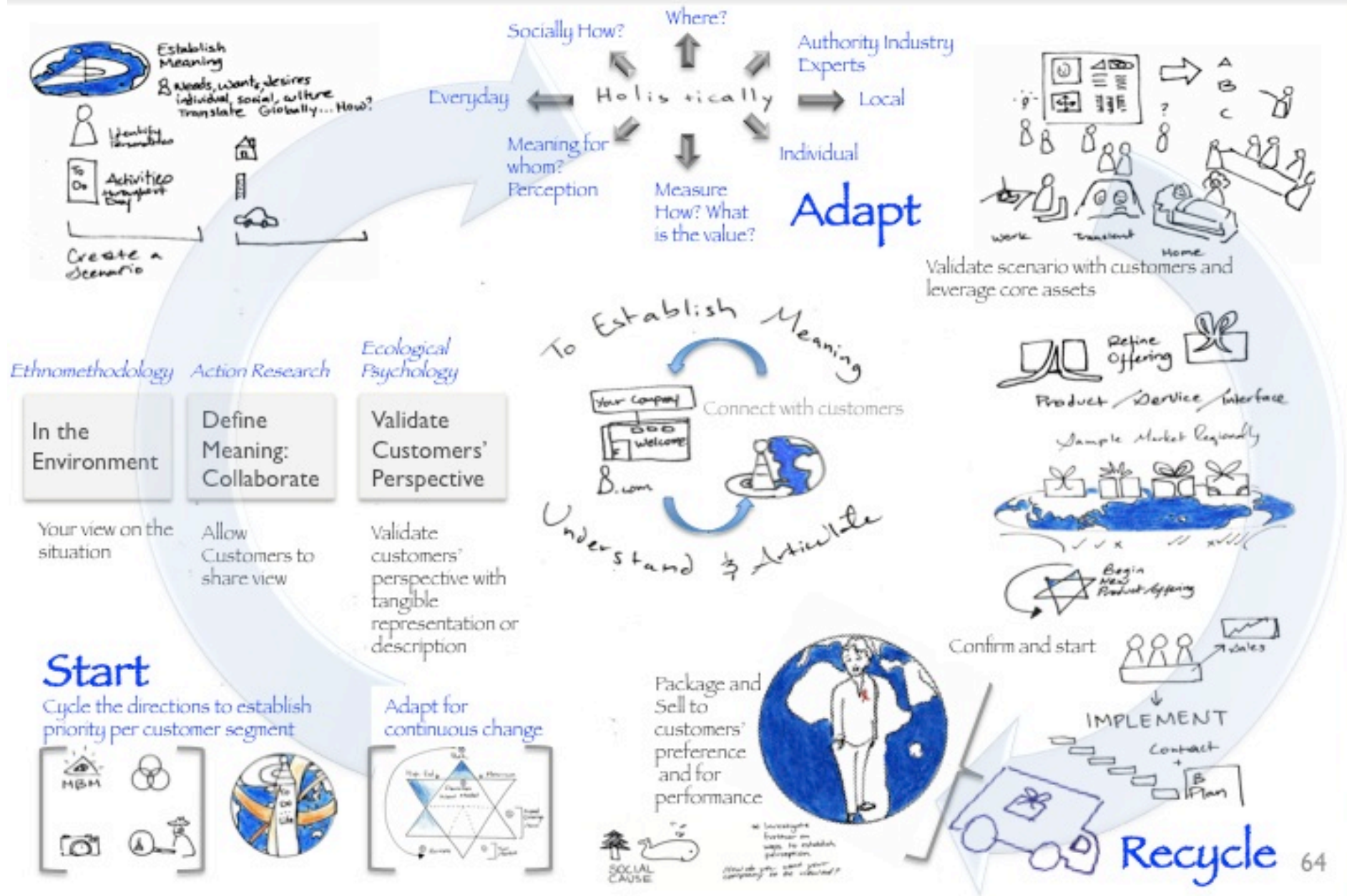
Recycle Methodologies for Continuous Growth

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.





# Innovation Transformation an Iterative Process for Discovery



## Silver $\sqcap$ Gerald

*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.*

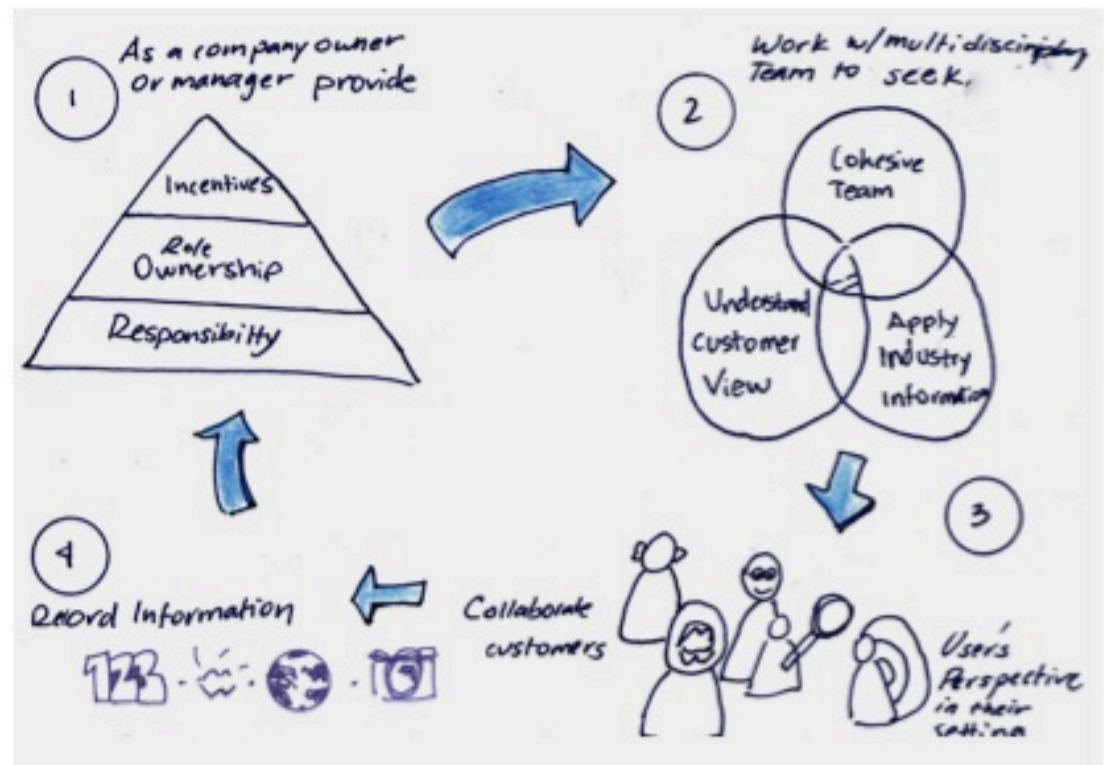


# Repeat

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.
4. Document findings to: reference, validate, teach, and apply.



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