

## Steps To Launch Your First Campaign

Running an idea management campaign with Qmarkets is the ideal way to collect the best ideas from your employees, and allow them to help you identify those ideas with the best potential.

Before you start your campaign, you will need to address the following few topics to simply enable you a successful and effective campaign launch.

Based on our experience from working with our customers, we have collected some best practices and guidelines for running a campaign. It does not intend to cover all options and capabilities, but rather to provide you with a check-list of things to think about before launching your campaign.

### The topics are:

1. **TOPIC** - Define the campaign topic – what are you collecting ideas for?
2. **AUDIENCE** - Define your target audience – who are you collecting from?
3. **WORKFOLW** - Decide upon an idea workflow – what is the process for submitting ideas?
4. **RATING \ VOTING** - how will you and your audience evaluate ideas?
5. **INFO** - Information per Idea – what information should a user fill-in per idea?
6. **INCENTIVES** – do you plan to give people incentives for participation / submitting the best idea?
7. **PARTICIPATION** – how to encourage participation & interaction?
8. **INTERNAL COMMUNICATIONS** – your plan to teach people about your campaign
9. **COLLABORATION METHODS** – how do they interact?
10. **TIME FRAME** - Define campaign schedules & timelines

⇒ ***Launch your campaign!!!***

### **Need any help?**

We will be happy to assist you in the definition process, and of course – in the implementation it using our software.

## Define Campaign Topic

The initial step is of course, to define the topic of your campaign.

The topic of the campaign sets people's focus – we are not collecting ideas on any generic improvement you may have, but rather would like to concentrate the efforts on one specific issue:

Some examples for topics could be:

- How to reduce the costs within our Operations center by 20% by end of this year?
- Ideas for new products under product line A
- How can we attract more customers to use our B service?
- How can we improve the working processes inside our R&D department?
- For our 10<sup>th</sup> anniversary, what slogan can we use that will best describe us to the world and to ourselves?

## Define Your Audience

Once your topic is all sorted out, you will need to define who you are collecting ideas from.

This could be your entire company, department\,s, or even a list of people chosen specifically from around the company.

You can also choose to expose this campaign to people outside your company, like selected consultants or experts, chosen vendors or customers, and even open it up on the internet to the public.

There is no right or wrong here, and each choice you make will have its pros and cons.

We did, however, try to collect our guideline for choosing your audience:

- Wider audience will generate more ideas (naturally)
- Wider audience will generate more objective results – more people will be rating ideas
- Smaller audience will be more focused and easier to manage
- Too small audience may create biased results

## Define the Idea Workflow

The idea workflow basically defines the process or life-cycle of an idea – from conception until final decision (implementation, rejection, etc).

For example, a simple workflow may be:

- **Published** – ideas are submitted by users, and immediately everyone (your audience) can see them, rate them and comment
- **Approved** – ideas that get the highest votes are marked by the campaign moderator as “Approved”.
- **Rejected** – ideas that are not chosen are marked by the campaign moderator as “Rejected”

You can decide on any number of stages in your process, to adapt to your requirements and existing company/department processes and needs.

**For example**, some other options you may have include:

- **Draft** - Allowing people to save their ideas as a draft before actually submitting it

- **Review** - Forcing all ideas to go through a review (by campaign moderator or other/s) before they are actually published. For example, to filter out ideas that are not related to the topic, make sure ideas are phrased in a clear manner etc
- **Detailed Review** - Review committee for ideas – adding another stage after voting on ideas is over, where a designated group of people will perform a detailed review of the top 10-15 ideas, and use this information to finally decide which ideas are approved and which are not
- **Implementation stages** - Track ideas status after they were approved and are in implementation stages. This is useful so the person submitting the chosen idea and others get full visibility

## Rating & Voting

One of the strengths of an idea management campaign relies on its ability to let your audience help you identify the best ideas raised so far. To do so, you have to enable your community to rate ideas.

For this manner, you have a few options:

- Thumbs Up / Thumbs Down voting –
  - o People can either say “I like this idea” or “I don’t like it”
  - o Thumbs up increases the idea rating by 1 point
  - o Thumbs down decreases it by 1 point
  - o Advantage – very simple & intuitive, very good for large audiences, as the idea current rating encompassed two inputs in one number – how popular is the idea and how many people voted so far
- Rating on a Scale (Stars)
  - o You can allow people to rate on a scale of 1 to 5 (or 1 to any number)
  - o At any point, rating shows the average
  - o Advantages – very familiar method, all grade are “normalized” to the same scale

For each of the above method you can add another level of detail, if you want your results to be more focused and exact. This is done by defining several criterions that people will rate by, and give each criterion a weight (0-100%).

For example, for a campaign for new product ideas, criterions could be:

- Potential revenue (30%)
- Cost for implementation (45%)
- Time to market (25%)

## Information per Idea

Submitting an idea into the system is a simple task of filling in a form. An idea always has a title/subject line and a free-text description.

In addition, you can choose to collect additional information per idea, in order to improve your capability to search for ideas, or to view statistical information in reports.

For this manner, you have a few options you can utilize:

- **Categories & tags –**
  - People submitting ideas will have to categorize it
  - This could be done by choosing from a fixed list (i.e. category) that you define for this campaign, or by “free tagging”, which is allowing people to insert keywords that they find best describe the idea
  - Using categories and/or tags will increase your ability to find ideas quickly, and allow you to see statistics per category
- **Attachments -**
  - People could add pictures or related documents into their idea
  - One picture could even be shown next to the idea, making your campaign more lively and attractive
- **Anonymous Submission**
  - Do you think that allowing people to publish ideas anonymously may help to encourage them to raise ideas?
  - If you do, allow them to choose this option when they submit an idea
- **Additional properties –**
  - You can define more properties/field you would people to fill in while submitting an idea.
  - For example, you could decide to add a property called “Cost”, where people will need to fill in their expected cost for implanting this idea

## Incentives

An important factor of every idea management campaign is getting your people on board, and motivating them to participate.

Research has shown that providing employees with a clear incentive, like prizes, dramatically increases the efficiency of such campaigns.

If you choose to have an incentive scheme, you could use one of the two options:

- **Simple** – best ideas are worth a prize
  - Employees that their ideas will be chosen will win a prize
- **Advanced** – participation is worth points, points give you prizes
  - Employees win points for different actions they perform in the campaign
  - You define how many points and for which actions
  - For example:
    - Submitting a new idea – 10 points
    - Commenting on an idea – 2 points
    - Idea approved for implementation – 50 points
  - Users with most number of points at the end of campaign (or a time period) will win a prize

In either case, it is important to publish your incentive scheme to your employees, and also put it up on the system in a visible place, to attract attention and recognition.

## Encourage Participation & Interaction

Giving people incentives to participate is, in most cases, not enough. The word “campaign” is not an arbitrary one – you must manage this process just like any internal campaign.

To manage it effectively, you may use any of these tools:

- Ongoing emails / newsletters
  - o Send teasers, reports and any other information to all your participants
  - o Try doing this once every few days – don't spam them
- Automatic daily / weekly summary email
  - o Can be sent automatically, notifying all users of all the new ideas and or/comments that were added to the campaign during the day
  - o Could be sent once a day (or every few hours for very short campaigns)
  - o Helps show people that your campaign is alive, attracting them to contribute as well
- New Comment notification –
  - o Anytime someone adds a comment to one of my ideas, system can automatically notify me
- Manage a campaign moderator blog
  - o Where campaign moderator can interact with his community, provide interesting and relevant information etc

## Internal Communications

Our idea management software was born to be simple for end-users. In most cases, a simple introduction email at the beginning of the campaign is enough so people can start participating.

However, for your campaign to succeed, you must explain to your audience about the process, set their expectations and provide them with the right motivation.

You can do this in several ways, but we recommend:

- Recruit key people and managers in advance –
  - o tell them about your plans and its importance, and get them on board
  - o make sure they pass this information onwards to their employees
- Email/s before campaign starts
  - o A general 1 or more emails, setting the context
  - o It is recommended that email will be sent from the highest manager in charge of the campaign. For example, for a campaign on reducing costs in the operations center – the head of operations should send these emails
- Information inside the system (our software)
  - o Front page of the campaign should contain information about it
  - o Use the side banners for additional teasers and info
  - o Have a short “About” page, covering all the required information

All the above methods should convey the following information:

- Describe the process
  - o Emphasis on how the best ideas will be chosen
- Describe your incentive scheme
- Emphasize the importance of this process
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## Collaboration

Aside from submitting new ideas and allowing everyone to vote, you may use a few other collaboration tools that can enhance the community's productivity and generate great results for your campaign.

These tools include:

- Commenting on ideas – people can their insights to existing ideas, expand them, and create a discussion around ideas using comments
- Forums – where users can discuss topics that are not related to a specific idea, but are very relevant to the campaign topic

## Time Frame

For each campaign we advise to set a well known and published time frame.

It is well known that a given time period increases the audience participating and get everyone focused on the campaign goals,

Such a time period should be one that from one hand is not too long (in order to keep the focus), yet not too short (in order to let the audience participate easily upon their schedule).

Our recommendation is to have a minimum of 2 weeks and maximum of 2 months per each specific campaign.

## That's It!

All you need to do now is let us know about your choices, and we will quickly configure the system to match them – so you can get get started with your first campaign...

Good luck!