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INNOVATE

Trainers' Guide for Innovation Management Training

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Project Information

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1. Introduction

This guide for trainers was created as part of the project entitled "INNOVATE – Innovation Management Standard for Quality and Business Acceleration". The project is co-financed by the European Union under the Erasmus + program. The project is implemented from October 2023 to October 2025 in international partnership with entities from Austria, Bulgaria, Cyprus, Finland, France, Poland and Sweden. The aim of the project is to help European vocational education and training organisations (EVE) stay on the development path by improving management competences through innovation, understood as a new management paradigm. The main goal of the project is to find, create, test and promote new methods of improving these organisations so that they become more resilient to new challenges.

The aim of this guide is to facilitate the work of trainers who will conduct training in the field of innovation management in accordance with the ISO 56000 standard. These trainings are based on training materials developed as part of this project, such as: the INNOVATE Whitebook, the INNOVATE Manual, the E-learning, group tasks, case studies, exercises, and other teaching aids. The proposed training program consists of 9 thematic modules, each consisting of several units. The project also developed a Whitepaper and Manual, which can be helpful both for trainers who are to conduct training in the field of innovation management, as well as for the target participants of such training. In the guide, we outline the role of the trainer in the process of teaching adults (andragogy), with particular emphasis on training in the field of innovation, and we recommend specific training methods that can be used in the practical implementation of training content included in these 9 thematic modules.

The guide is intended only to support and assist the trainer, who should have the appropriate competences and experience in conducting training for adults.

2. The role and tasks of trainers

Being a trainer is not easy. It requires pedagogical competences, strong subject knowledge, practical experience, and a range of soft skills related to building relationships with participants, communication, empathy, etc. Trainers should be experts in the field to earn participants' trust and create a learning environment that encourages openness and confidence. This is especially important in the case of innovation management training, which varies depending on the participants' backgrounds and the type of innovation they engage with. For instance, training focused on social innovations will require different knowledge than training in the field of technological innovations.

Training can influence individuals, teams, or even entire organisations. Transformation rarely happens overnight. In VET contexts, change usually begins at the individual level: when learners start to apply new ideas and approaches in their work environment. Over time, these

individual changes can accumulate into broader organisational development.

The purpose of any training activity is to develop participants' competences — the combination of knowledge, skills, and attitudes. Knowledge is acquired first, then applied in practice to develop skills. Shaping attitudes takes longer and requires practice until new approaches can become natural. Trainers are responsible for the entire training cycle: analysing learning needs, designing content and delivery methods, preparing materials and tools, facilitating sessions, and evaluating learning outcomes. In innovation management training, based on the ISO 56000 standard, careful design and implementation are particularly important, as the topic requires both conceptual understanding and the ability to apply methods in real VET and enterprise contexts.

2.1. Identification and analysis of training needs

2.1.1. Understanding the participants to design effective training

To design an effective training program, it is essential to know who the participants are. Selecting participants and forming training groups should be done in close cooperation with the training sponsor — typically the organisation's HR department, manager, or owner. Before any training begins, a thorough identification and analysis of training needs must be carried out. The trainer needs to understand which competencies will be developed or improved during the program.

A key step is defining the so-called **competence gap** — the difference between the participants' current competence level and the desired level. Learning is a gradual process, and change happens over time. This is why it is crucial to adapt the content and format of the training to the participants' existing skills and knowledge. Insights into their competence levels are gained through the training needs identification and analysis process.

2.1.2. Examples of methods for assessing training needs

There are many methods for professional identification and analysis of training needs. These can include:

- conversations with future training participants (e.g. in the form of individual in-depth interviews or group interviews),
- research surveys in the form of questionnaires (including, for example, text and/or graphic response options),
- knowledge tests,
- solving a specific case study,
- a sample of your own work, e.g.: https://evaluation.dieberater.com/innovate_self_assessment
- observation of a given person in the workplace, etc.
- consultations with managers or direct superiors of the training participant.

The choice of research methods and technique depends on the trainer. In the case of training conducted on the topic of innovation management, special care should be taken to ensure that it is attractive and engaging for participants, and that it stimulates their creativity and process approach to innovation management. It is important to note that each of the methods mentioned has a different nature, and some of them may be time-consuming.

2.1.3. Key questions for training needs analysis

A set of key questions to help identify and analyse training needs before innovation management training:

A. General questions – organisational context
What strategic goals does the organisation associate with innovation?
What current challenges does the organisation face in implementing innovative practices or processes?
Is there a formal innovation management process in place (e.g. idea generation, validation, implementation)?
Which innovation-related competences (e.g. leadership, analytical thinking, creativity) are already present in the organisation, and which ones need to be strengthened?

B. Participant-level questions
Self-assessment from online-training:
https://evaluation.dieberater.com/innovate_self_assessment

C. Team and project collaboration
What roles do team members typically take on in innovation or project settings (e.g. leader, facilitator, creative contributor, technical expert)?
How effectively do teams apply innovative methodologies such as design thinking, agile, or lean approaches?
How is cross-departmental collaboration encouraged and coordinated during innovation projects?
How does the organisation create a safe environment for experimentation, reflection, and learning from failure?
In what ways are leadership, communication, and problem-solving competences demonstrated in team settings?

D. Expectations and training objectives
What specific outcomes does the organisation expect from this training?
Which competences should participants develop or strengthen to enhance innovation (e.g. leadership, analytical reasoning, creativity, adaptability, collaboration)?
How will progress and success be measured — for example, through behavioural change, generation of new ideas, or implementation of innovative solutions?
What follow-up actions or mentoring activities are planned to sustain competence development after the training?

2.1.4. Identification of training participants' learning styles

As part of the analysis and identification of participants' training needs, it is very important to determine the learning styles of participants (e.g. visual, kinaesthetic, verbal, sequential, global, etc.). This can be done before the training (if possible), or during the training session. Adult learning styles are the way in which they process, assimilate and interpret new information. One of the most well-known and recognised theories of adult learning styles is David Kolb's model, based on the Experiential Learning Theory (ELT) cycle. This approach is particularly popular in adult education, training and professional development.

David Kolb's Experiential Learning Theory (Kolb, 1984): Kolb assumes that learning is a process of transforming experience into knowledge and that it takes place in a four-phase cycle:

1. **Concrete Experience:** Learning through direct experiences, emotional involvement, action in practice
2. **Reflective Observation:** Analysis of experience, drawing conclusions, observation from different perspectives
3. **Abstract Conceptualisation:** Formulation of theories, principles and models, understanding the concepts behind experience
4. **Active Experimentation**: Testing new solutions in practice, implementing ideas, "trial" actions

It should be noted that David Kolb's Experiential Learning Theory is universal in terms of andragogy. It is often treated as part of the professional trainer's bible. We refer to this theory here – describing its usefulness for recognising learning styles in the analysis and identification of participants' training needs – but we will also refer to Kolb's cycle in terms of conducting training in the strict sense, which you will find in the following parts of this trainer's guide.
Description and characteristics of learning styles according to Kolb's theory:

Learning Style	Description	Key Characteristics
Accommodating	Learn through hands-on experience, intuition, and active experimentation. Often rely on others for information and prefer practical, experiential tasks.	Action-oriented, adaptable, risk-takers, open to new experiences, prefer group work and trying things out.
Diverging	Learn through observing and reflecting. Strong in generating ideas and viewing situations from multiple perspectives.	Creative, imaginative, emotionally aware, good at brainstorming, prefer to watch rather than do.
Assimilating	Learn by logically organising and integrating information into concise, clear formats. Prefer theoretical models and abstract concepts.	Analytical, logical, detail-oriented, prefer lectures and readings, less focused on people and more on ideas.

Learning Style	Description	Key Characteristics
Converging	Learn through applying ideas in practical ways. Excel at problem-solving and decision-making based on logic.	Technically minded, efficient, solution-focused, prefer working alone, use knowledge to solve real-world problems.

Own work based on: David Kolb's Experiential Learning Theory (Kolb, 1984)

2.2. Training preparation

2.2.1. Establishing training objectives

When designing training, the most important thing is to define its objectives. These objectives should be described in the language of learning outcomes, e.g. by participating in the training, the participant will learn what the requirements of the ISO 56000 standard are in the field of innovation management, or the participant will learn to effectively plan the implementation of innovations. It should be remembered that the training objectives must be ambitious, but at the same time they should be realistic. One training cannot change a person's established habits. This requires much more time. To define the training objectives, we can use, for example, the SMART, CLEAR, or Kirkpatrick Training Goals methodology. The training objectives must be agreed with the training client. Keep in mind that the trainer is not only a blind executor of the training, but should also help the client define the training objectives and recommend some changes or adjustments so that the training meets the needs of the participants and the client to the greatest extent possible.

2.2.2. Preparation of training outline and selection of training methods

The next step is to plan the content and form of the training. The trainer should plan the content of individual training modules, time frames, necessary materials, etc. All these elements should be included in the training outline, which should also be agreed with the client. In the case of training on innovation management conducted on the basis of the developed results of the Innovate project, the matter is somewhat easier, because the content of the training modules (and smaller thematic elements – units), time frames, the rest of the group and individual exercises and other teaching aids have already been established. The trainer therefore uses a ready-made set of materials dedicated to conducting this type of training.

The trainer must also choose the training methods that will be used during the training. Particular attention should be paid to the so-called methods of activating participants, which include:

- games and training simulations,
- team tasks,
- learning-by-doing,

- action learning,
- design thinking
- individual and group exercises,
- moderated discussion,
- role-playing,
- open space / world café method,
- gamification (simulation training games)
- quizzes and competitions.

It is important to ensure that the activating methods are supplemented with lectures, talks and presentations.
Suggested training methods that can be used to conduct individual training modules on innovation management will be presented later in this study.

When it comes to working with a group, it is worth following these tips:
- ensuring breaks approximately every 90 minutes
- using precise, inclusive and understandable language (explaining any terms and doubts)
- presenting detailed instructions for completing tasks/exercises
- dividing content into smaller units (micro-lessons)
- ensuring multi-sensory communication (videos, images, presentations with narration)
- willingness to change the form of classes and flexibility (the trainer should have several versions of the action plan, e.g. plan A, B and C, adapted to the pace of the group and the progress of the learning process).
- if possible, it is worth working in cooperation with a co-trainer or moderator – especially with larger groups. This allows for the division of responsibilities and a better response to the needs of participants.

2.2.3. Preparation of teaching materials

The trainer must also select and prepare teaching aids and develop training materials for participants. In the case of training within this project, the entire set of materials is ready. However, it is worth taking care of additional teaching aids, which may be, for example, questionnaires, props, flipcharts, note cards, multi-coloured markers, scenarios, props in the form of blocks, paper, tissue paper, office supplies. All of this can be helpful to the trainer during training and contributes to increasing the attractiveness of the training in the eyes of the participants. The amount of materials should be adjusted to the size of the group each time, ensuring that several sets of materials are available.

2.2.4. Organising the training space

The trainer is also responsible for ensuring that the training venue is well prepared. In the case of online training, this includes planning how participants will be divided into virtual breakout rooms if needed. The trainer should also ensure good conditions for learning, such as a comfortable room temperature, appropriate lighting, and well-timed breaks. If possible, the

trainer should arrive at the venue in advance to familiarise themselves with the space and check all technical aspects, such as the projector, audio system, and room layout.

Key considerations include:

- **Soundproofing:** the room should be adequately insulated to minimise external noise.
- **Break area:** if possible, provide a separate space where participants can enjoy coffee, tea, and snacks during breaks.
- **Lighting:** natural light is ideal; if this is not available, ensure that the lighting can be adjusted and is sufficiently bright.
- **Air quality:** ventilate the room before training or ensure proper air conditioning.
- **External distractions:** minimise noise, overly bright colours, strong smells, and other sensory distractions.
- **Room layout:** if teamwork is planned, arrange tables, chairs, and walkways to support smooth group collaboration.

2.3. Training conduct

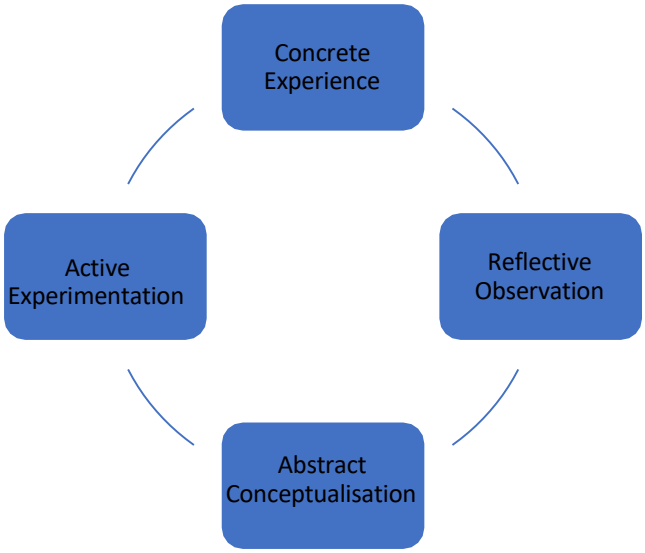
2.3.1. The role of "Group Norms" in the training process

The training should be conducted in such a way as to achieve the greatest possible effects for the participants, while at the same time providing them with a sense of security, comfort and a good atmosphere. The training should begin with introducing yourself to the participants, presenting the subject and purpose of the training, its duration and developing so-called "Group Norms" (an agreement with the participants regarding the rules that will apply during the training, e.g. we all turn off our mobile phones, we respect each other, we do not judge others, we can leave the room at any time if we feel uncomfortable, etc.). It is important that the Group Norms are developed from the bottom up by the participants and all of its elements are accepted by the people taking part in the training. Referring to the provisions of the Group Norms helps the trainer to respond to difficult situations that may arise during the course.

2.3.2. Structure of the training session

Each training session should be divided into thematic modules, which should be presented to participants at the very beginning. In order for training participants to achieve the greatest possible effects in the form of improvement or development of their competences, it is necessary to conduct training according to the established structure. One of the most well-known and effective methods of helping participants acquire competences is the so-called Experiential Learning Model or Kolb Cycle. Using the Kolb Cycle in educational processes brings many benefits. Due to the fact that this method is based on active acquisition of knowledge, people taking part in the training are able not only to remember much more, but they also become more interested in the topic being discussed. The Kolb Cycle consists of 4 stages. You can start from a selected stage of the cycle, but you should stick to their order (i.e. always know which stage follows which). The Kolb Cycle consists of 4 repeating stages:

- Concrete Experience – something is happening, I am participating in something, I am observing something, and some data is reaching my senses. If you are not participating in something, you are not involved, you cannot learn anything, active participation, involvement, relating to yourself is a condition for the learning process to occur.
- Reflective Observation – I pay attention to what happened or is happening, I process the data flowing into my mind, I compare it with what I have in my memory, I put it into words. The experience itself is not enough, you also have to realise that something is happening, that you are experiencing something. If you cannot look at your experiences from distance, you will not learn anything.
- Abstract Conceptualisation – I connect what I have perceived into a whole. I create concepts and theories using abstract thinking. My mind produces theories based on what I perceive. If you just nod your head at your observation, your learning process stops halfway. In this phase, you generate knowledge from your own experience and observation. In other words, you draw conclusions. You ask yourself, what is the conclusion of this? What can I learn from this?
- Active experimentation – using the general conclusions I have reached to try to apply them in practice. I ask myself: What can I do then? How can I use this in practice? What can I change?



Own study based on Van Vliet, V. (2013). David Kolb. Retrieved May 31, 2022 from Toolshero: https://www.toolshero.com/toolsheroes/david-kolb/

Each exercise, each training module, and the entire training should be summarised by the trainer each time. At the end of the training, the trainer should make sure that all participants have understood the most important substantive content and answer their questions. This is particularly important in the case of complex training content, as it allows participants to organise their newly acquired knowledge or skills and retain the so-called **recency effect** for longer. The recency effect is a psychological phenomenon in which people better remember information that they heard or saw last in a given sequence – e.g. at the end of the training,

presentation or lecture. In the context of the trainer's work, the recency effect has practical significance for planning the structure of the training.

Here are some key aspects:

- Stronger retention of final content
  Trainees tend to remember best:
  - the last part of a module or training session,
  - final conclusions, summaries,
  - final exercises or examples.

- Potential to reinforce key messages
  Therefore, trainers should:
  - place the most important information or messages at the end of the module,
  - use final summaries that reinforce the content,
  - ensure a strong conclusion to the training, e.g. an invitation to reflect or specific "takeaways".

The recency effect most often occurs together with the so-called primacy effect – we also remember better what appeared at the beginning. The middle of the training is usually the least remembered part, which is why it is worth using activating techniques there. Before the end of the training, the trainer can check the knowledge of the participants (e.g. using a knowledge test or quiz). At the end, the trainer should distribute evaluation questionnaires to the participants, the results of which will be used to evaluate the entire training process, at the same time constituting an important source of feedback for the trainer.

2.3.3. Summarising and Leveraging the Recency Effect

Throughout the training, the trainer should provide a **summary after each exercise, each training module, and at the end of the entire program**. At the conclusion of the training, the trainer must ensure that all participants have understood the key points and should answer any remaining questions.

This practice is especially important when the content is complex. Summaries help participants structure their newly acquired knowledge and skills and take advantage of the **recency effect**.

For trainers, understanding and applying the recency effect has practical value: it helps design the structure of a training program so that the most important messages stay fresh in participants' minds and support long-term learning.

2.4. Training evaluation

2.4.1. Understanding the evaluation of the training process

Evaluation is an objective assessment of the training process, conducted on the basis of specific research criteria. These criteria may include:

- effectiveness,
- utility,
- efficiency,
- relevance,
- durability of training results,

Training evaluation usually includes:

- assessment of substantive content,
- assessment of the trainer's work (assessment of knowledge, assessment of the training methods used, assessment of the skills of conducting the training, assessment of contact with the group, satisfaction with the answers to participants' questions),
- assessment of training materials and teaching aids used during the training,
- assessment of the technical and organisational conditions of the training.

The results of training evaluation constitute excellent feedback for the trainer, as well as for managers and owners of the organisation. The results of evaluation should serve to continuously improve the competences of trainers. Evaluation should provide reliable and useful information that will enable the improvement of training methods in the future and allow for rationalisation decisions.

2.4.2. Techniques for collecting feedback from participants

Training evaluation is usually conducted from an ex-post perspective (after the training is completed). Various data collection techniques can be used for this purpose. The most common include:

- evaluation questionnaires completed by participants at the end of the training. Consider using a so-called visual/picture survey (Visual Feedback Form), which uses icons, symbols (e.g. emoticons, coloured elements), simple graphics or pictograms.
- knowledge tests (before and after the training, used to calculate the knowledge increase indicator),
- "Like / Dislike" cards. Each participant receives two cards – e.g. a green one with the inscription "Like" and a red one with "Dislike". The trainer gives statements (e.g. "Work in pairs", "Individual tasks") and participants show the card they identify with. This is a form of non-verbal, safe expression of participants' opinions,
- anonymous comments box / sensory box. It is a physical or digital box into which participants can throw cards or notes with comments. Alternatively, it can be a so-called "sensory box", into which you can throw, for example, a bead: blue – "something I liked",

red – “something bothered me”. For some participants, anonymity is the key to honesty. The non-verbal form is less demanding emotionally and linguistically.

- one question on a piece of paper (One-Minute Paper): At the end of the training, participants write down the answer to one simple question, e.g.:
    - “What did you remember best?”
    - “What was difficult?”
- a short written form with a simple question allows you to focus on specifics and is not overwhelming.
- mentimeter or other available online tools. Interactive, anonymous tools for collecting feedback in real time – e.g. multiple choice questions, word clouds, rating scales. They provide anonymity and interactivity, do not require eye contact or oral expression.
- interviews with participants in the form of individual conversations/1:1 feedback. After the training, the trainer can invite willing participants to a short individual conversation – face to face or online. This is a more dialogical form. Some participants feel more confident in a one-on-one relationship. However, it is necessary to ensure that such a conversation is not perceived as evaluative.
- observations of participants during the training supplemented by an individual feedback session,
- samples of the work of training participants in the form of tasks to be completed independently. This solution works well in the case of cyclical training sessions, between which participants have time to perform the implementation task in practice, using the competencies that were developed during the training.

2.4.3. Trainer tips for training evaluation

- always allow for a choice of the form of providing feedback (written, verbal, graphic).
- do not evaluate or comment directly on the opinions of participants, especially in front of a group.
- ensure sensory and time comfort – give time to think, do not exert pressure.
- use feedback results in a visible way, e.g. by showing that you take them into account in further stages of work.

3. Recommended training methods within individual modules

3.1. Module 1 – Introduction to innovation

Method description

This module provides a foundational understanding of innovation and innovation management, combined with a varied and interactive set of training methods designed to foster participant engagement and active learning. A mix of mini-lectures, facilitated discussions, individual reflections, and group activities are used throughout the module. These methods aim to help participants grasp key concepts, differentiate between related terms like invention and innovation, and explore various types and frameworks of innovation, including standardised definitions.

Key methods employed include:

- **Interactive mini-lectures**: Short theory sessions using visual aids to present key definitions and distinctions.
- **Moderated discussion**: Guided group conversations on participants' own experiences with innovation.
- **Group work and team tasks**: Participants collaborate to apply innovation frameworks to real-world scenarios.
- **Quizzes and competitions**: Knowledge-checks and informal contests to reinforce terminology and typologies.
- **Learning-by-doing**: Structured tasks requiring application of ISO 56000 concepts.
- **Design thinking micro-session**: A brief brainstorming activity using empathy mapping or ideation techniques.
- **Simulation game (innovation radar)**: A game-like activity where groups map types of innovation onto example companies.
- **Individual reflection exercise**: Participants write down personal takeaways and relevance to their work.

How to use this method?

This module should be delivered using a blended methodology that supports experiential learning. Trainers should facilitate a psychologically safe and inclusive learning environment where participants are encouraged to explore and challenge their own assumptions. The trainer acts not just as a knowledge provider but as a guide who stimulates curiosity and learning through structured experiences.

Trainers are encouraged to adapt pacing and content depth to the learning styles present in the room (e.g., visual, active, reflective). They should use examples from diverse sectors and utilise visual tools such as the Ten Types of Innovation framework and the Innovation Matrix.

Trainers should actively integrate activating methods such as:

- Design Thinking for rapid ideation
- Simulation-based competitions (e.g. mapping types of innovation)
- Team-based challenges
- Guided individual work
- Open-space debate (optional method at the end of the module)

Learning outcomes

By the end of this module, participants will:

- Understand various definitions of innovation and innovation management
- Distinguish between innovation, invention, and improvement
- Recognise key types of innovation and when to use them
- Be familiar with the ISO 56000 series and its relevance
- Begin applying innovation concepts to their own professional contexts

Step 1: Introduce the concept of innovation

Duration: 20 minutes

Trainer's responsibility:

- Present historical and modern definitions of innovation using PowerPoint slides
- Emphasise the difference between innovation and invention (e.g. ISO 56000 and Oslo Manual distinctions)
- Facilitate a brief discussion: "What does innovation mean in your context?"

Step 2: Explore standardised definitions

Duration: 20 minutes

Trainer's responsibility:

- Explain key standardised definitions from Oslo Manual (2018) and ISO 56000 (2025)
- Highlight different types of innovation: product, process, organisational, and marketing.
- Introduce innovation as both a process and an outcome.
- Use an individual worksheet quiz (true/false or multiple choice) to verify understanding.

Step 3: Discuss key types of innovation

Duration: 30 minutes

Trainer's responsibility:

- Present the Innovation Matrix (Incremental, Semi-Radical, Radical Innovation)
- Introduce the Ten Types of Innovation framework (Keeley et al.)

- Guide participants in an Innovation Radar game: assign well-known companies and let participants map them to innovation types
- Facilitate design thinking micro-sprints: quick ideation based on a user persona

Step 4: Interactive group exercise

Duration: 45 minutes

Objective: Apply definitions and types of innovation to real-world scenarios.

Trainer's responsibility:

- Divide participants into small groups
- Assign each group one type of innovation category or framework (e.g., technology, process, business model)
- Ask them to develop, analyse, and present one real-world example of innovation in that category
- Use a worksheet to guide group discussion
- Optionally structure this as a mini competition with small rewards

Step 5: Presentations and reflection

Duration: 30 minutes

Trainer's responsibility:

- Facilitate 3–5 minute presentations per group.
- Lead reflection linking exercises to ISO 56000 principles.
- Conduct individual written reflection: "What will you apply in your role or team?"
- Optionally use World Café to allow rotation between discussion tables

Step 6 (optional): Gamified knowledge check

Duration: 15–20 minutes

Trainer's responsibility:

- Use an interactive quiz tool or a physical gamified knowledge competition.
- Questions may cover ISO definitions, innovation types, and real-world cases.
- Conclude with a leader board or collective discussion of correct answers.

Recommendations for the trainer

- Encourage questions and sharing of diverse viewpoints
- Encourage active participation and multi-sensory learning.

- Use a flexible structure to accommodate different paces and levels of prior knowledge
- Use real-life examples (e.g., Apple, Dell, Spotify) from a variety of industries to illustrate key concepts
- Balance theory with practical applications
- Emphasise that innovation is not limited to products – it includes processes, models, and services
- Reinforce key distinctions repeatedly (e.g., innovation vs. invention)
- Introduce role-play or storytelling if the group is highly engaged

Materials needed

- PowerPoint slides presentation on definitions, types, and frameworks of innovation
- Flipcharts, markers, post-its
- Innovation Matrix and Ten Types of Innovation diagrams as handouts
- Group exercise worksheets
- Printed quiz or interactive quiz app
- Templates for design thinking sprint (e.g., empathy maps, idea canvas)

3.2. Module 2 – Learning Innovation

Method description

Role play is a highly effective experiential learning method, widely recognised as one of the most powerful tools for ensuring that participants actively apply and practice the concepts discussed.
This approach allows trainees to assume specific roles or enact particular scenarios, thereby immersing them in realistic situations. Role play can be conducted in groups or pairs, fostering engagement and facilitating the practical application of knowledge in a controlled environment.

How to use this method?

The main rule when conducting a role play is to provide a safe environment where participants feel safe to experiment with different behaviours, practice problem-solving, and develop a deeper understanding of the subject matter.

The key elements of the role play are:

- Scenarios – clear, specific, realistic and designed to meet the learning objectives.
- Role distribution with clearly defined characters.
- Guidance and instructions from the trainer about the main objective of this exercise to navigate the participants in the game play.
- Feedback after the role play by the trainer.

Step 1: Initial preparation

Develop specific scenarios & describe the different roles

Duration: 30–40 minutes depending on how many scenarios you want to develop.

Trainer's responsibility:

- Define the learning objectives of this exercise.
- Develop specific real-life scenarios on the specific topic. Define if you want to play the scenarios in groups or in pairs.

Example:
Describe a situation where a leadership approach is needed such as delegate a new project to a team member.
Roles: Describe the role of the leader assigning behaviours depending on the different leadership styles. Describe the role of the team member as well.
This is a role play for pairs.

Step 2: Introducing the method

Present the activity and its relevance to innovation management leadership.

Duration: 10 minutes

Trainer's responsibility:

- Introduce the activity explaining what is the purpose, how it will be done and how long it will take.

Step 3: Preparation time for participants

Give the participants in the role play time to prepare.

Duration: 10–15 minutes

Trainer's responsibility:

- Distribute on paper or digitally the scenario with a specific role to the trainees who will participate in the activity.
- If part of the audience will not participate in the role play, you can assign them an "Observation role" and give them an observation sheet where they can take notes based on the role plays.
- Answer questions if participants have any.
- Repeat once again the guidance.

Step 4: Role play in action

The scenarios go live and participants practice the different approach/ behaviour.

Duration: 5–10 min for each scenario. Total duration depends on the number of scenarios and role plays.

Trainer's responsibility:

- Observe and take notes on the behaviours and body language.
- If needed, intervene and provide additional clarification and guidance for the role play or stop the role play.

Step 5: Feedback and closing of the activity

Time to analyse what was just presented.

Duration: 20–30 minutes depending on the number of role plays.

Trainer's responsibility:

- Ask each participant how he/she felt in his/her role. What was comfortable/what was not comfortable.
- Let the observants share their thoughts.
- Give your feedback – which behaviour was appropriate; which phases were perfect or could be improved. Give general recommendations on how and what to do in such a specific situation.

- Outline the main learning points from this activity.

Recommendations for the trainer

- Facilitate, don't judge. Help participants reach their own conclusions.
- Be ready to face objections when it comes to role play and stepping into specific roles. Change of the initial distribution of roles is also possible if needed.
- Practice active listening.

3.3. Module 3 – Innovation Culture

Method description

Trainer's Guide – Teaching Innovation Culture: A Learning Journey into Innovation Culture

Duration: 3.5–4 hours (including break)
Structure: Story → Theory → Strategy → Practice → Personal Application

Think about the learning journey into innovation culture as a House of Innovation Culture metaphor.

How to use this method?

Pedagogical common thread

- Use the **"House of Innovation Culture"** metaphor throughout:
  - Foundations = theory
  - Structure = strategy and organisation
  - Interior and everyday life = practical actions
- This visual is on the wall throughout and is supplemented step by step to create a coherent picture.

This makes the whole thing rhythmic, engaging, and pedagogically consistent—not just theory, but an experience of learning about innovation culture.

Step 1: Initial warm-up

1. Initial warm-up (15 min)

- Objective: Participants orient themselves to the theme and share their own experiences.
- Method:
  - Short introduction and review of learning objectives.
  - "Quick round": What is the most recent situation in which you have noticed innovation or a lack thereof in your organisation?

Step 2: Definition and theory

2. Definition and theory (45 min)

- Objective: To create a common foundation – what does innovation culture mean?
- Method:
  - Short introduction + visual ("House of Innovation Culture" → foundations: values, psychological safety, learning).
  - Small group task: "What signs indicate that a culture supports/does not support innovation?"
  - Joint discussion, summarising in light of the theory.

Step 3: Strategy and structure

3. Strategy and structure (60 min)

- Objective: To understand how strategy and organisational structure create space for innovation.
- Method:
  - Case story (e.g., Nokia vs. Supercell): how strategy influenced culture.
  - Workshop: groups design a "mini-strategy" for a fictional organisation.
    Where is room for experimentation in decision-making?
    How can structures (teams, rewards, management methods) be built to support the culture?
  - Brief comparison of the groups' outputs.

Break (15 min)

Step 4: Practical actions

4. Practical actions (60 min)

- Objective: To practice concrete actions for bringing innovation culture into everyday life.
- Method:
  - Simulation/role play: Participants are given a "management team challenge" ("The team is not sharing ideas – what do you do as managers/colleagues?").

- Review of solutions and linking to research/theory (e.g., psychological safety, rapid experimentation, feedback practices).
- Toolkit exercise: Select 2–3 practical actions (e.g., weekly idea workshop, thanking people for trying, retro sessions).

Step 5: Reflection and anchoring

5. Reflection and anchoring (30 min)

- Objective: Everyone applies what they have learned to their own work.
- Method:
  - Individual task: "Write down one concrete action that you will apply in your own work."
  - Collect the promises on a shared digital board (Padlet/Miro/Jamboard).
  - Closing round: "What was the most powerful insight?"

Recommendations for the trainer

- Use a flexible structure to accommodate different paces and levels of prior knowledge
- Use real-life examples from a variety of industries to illustrate key concepts
- Balance theory with practical applications
- Reflection on and anchoring the "**House of Innovation Culture"** in real life and practice.

3.4. Module 4 – Generating ideas

Method description

The “Mastermind” method is a structured approach for problem-solving and personal or professional growth that leverages the collective intelligence, experience, and support of a small peer group.

The “Mastermind” approach is a concept associated with the idea of collective thinking and cooperation between people with different skills and experience. One of the first significant contributions to the Mastermind concept was the book “Think and Grow Rich”, written by Napoleon Hill in 1937. In this book, Hill describes the principle of the “mastermind alliance, ” which is a group of people who work together to achieve common goals by sharing knowledge, ideas, and resources. According to Hill, when people combine their minds and efforts, they can achieve much more than if they work alone. In the 20th century, various mutual aid groups and think tanks began to form, where people with similar interests or professions would gather to exchange ideas and solve problems together.

The main objective of the Mastermind method is to help members reach their personal or professional goals more quickly and effectively by harnessing collective brainstorming, peer accountability, support, and the unique perspectives of the group. Key aims include:

- **Creative Problem-Solving**: Tapping into the wisdom and experience of the group to find innovative solutions to personal or business challenges.
- **Accountability**: By publicly committing to actions and reporting progress, members are more likely to follow through on their goals.
- **Goal-Setting & Achievement**: Members set clear, actionable objectives and receive consistent feedback and support to stay on track.
- **Personal Growth**: The Mastermind process encourages learning, self-reflection, and building new skills while supporting others.

Why the method works:

- Different perspectives
- Different experiences
- Different PERCEPTIONS
- Gradation and building on
- Digging deeper instead of relying on the most learned neural connections and reactions
- Freedom of choice and respect for the opinions of others

How to use this method?

Step-by-step guide for facilitating a Mastermind workshop during your training on innovation management:

Step 1: Explain the Mastermind concept and purpose

You can use the description above or prepare 2–3 informative slides to familiarise your audience with the Mastermind concept and what it is used for. A well-facilitated Mastermind process can address and unblock problems and issues, simply by virtue of tapping into the collective intelligence available in the mastermind itself.

Step 2: Work cases submission

All participants write down issues/challenges that they would like to be addressed by the group on post-its. You arrange the challenges on a flipchart/white board and ask participants to vote for the cases they prefer to explore further. There needs to be a "winner" with the biggest amount of points, whose case is selected.

Step 3: Detailed case description

The participant whose suggestion received the most points becomes the "focus person" (challenge owner) for the Mastermind discussion. The rest will act as "advisors". The focus person needs to describe the challenge in a detailed way, so that the context is clear for all participants. It is recommended to use the following template:

Mastermind for resolving difficult situations

Think of a specific situation (with a colleague/client or other) that you would like to influence in order to achieve better results or more effective and beneficial relationships within the team.

DESCRIPTION OF THE CHALLENGE:

1. *I WANT to influence the development of a specific challenging situation in a given situation/overall*

Description of the situation:

- *the nature of the problem – where, how, when and why it arose*

- *What would be the ideal outcome if I were able to influence the situation (think about the effect on the person, yourself, your colleagues, the business, etc.)*

2. *What steps have I already taken to influence the situation?*

3. *What challenges do I face/would I face along the way?*

4. *Who are the most important stakeholders in the situation? What are their needs/interests/pains and gains?*

Step 4: Introduce some ground rules for the group

As a facilitator it is your job to set the ground rules for the group to follow:

- We are all part of the mastermind, including you as the facilitator.
- Everyone reads their own question (open questions only), addressing the volunteer.
- No other questions are discussed, only those written on the post-its.
- The volunteer can choose NOT to answer certain questions. But if the reason for this is that there is no clear answer, they should share this with the group.
- No comments or judgments are tolerated. There is no requirement for the volunteer to make a decision on the spot as to which solution they would choose.

Step 5: Questions phase

Encourage all participants to write down any clarifying questions they might have with regard to the case. Anything they find unclear or that would help them understand the issue better, so that they could offer alternative solutions afterwards. Each question should be on a separate post-it. All questions should be open (no yes/no questions). Then the focus person answers the questions posed to them.

Step 6: Suggestions phase

Ask participants to write down their suggestions for the challenge owner on how to solve the issue or what could be done in the presented situation. Again, each suggestion shall be written on a separate post-it. Remind participants of the rules if needed.

Step 7: Ranking & Commitment

Help the focus person read all given suggestions and further clarify them with the group if needed. Then ask the challenge owner to prioritise the solutions – which ones they find most applicable; which ideas feel the most actionable or inspiring. Ask the focus person to share impressions on the suggestions given and commit to next steps in front of the group.

Step 8: Debrief

It is recommended to foresee some time for reflection at the end of the activity – especially if the group is doing it for the first time. Sit down with the participants to discuss their experience throughout the process – you could use (some of) the following questions to guide the reflection:

- How did you feel about the structure of the Mastermind format?
- Did the time constraints help or hinder your thinking?
- How did the group dynamic influence the ideas generated?
- What types of ideas came up that surprised you?
- Were there any moments of strong collaboration or breakthroughs you noticed?
- How could you apply this method in your own team or organisation? (If not the case)
- What would you do differently next time when using this method?
- Which elements of this method would you integrate into other brainstorming or decision-making sessions?

Recommendations for the trainer

1. Set the scene clearly

- Explain the purpose of the method: idea generation through collective intelligence focused on one participant's challenge at a time.
- Make sure participants understand the roles: one "focus person" (the challenge owner) and the rest as "advisors."
- Emphasise that this is not a debate or feedback session, but an opportunity to generate ideas and options.

2. Structure the time firmly

- Use a visible timer to keep each Mastermind round within the allocated time (e.g., 10–15 minutes).
- Divide time clearly: short intro by the focus person, silent idea generation, and then verbal sharing.
- Stick to the format – structure creates safety and flow.

3. Ensure psychological safety

- Encourage a non-judgmental atmosphere – all ideas are welcome, no matter how wild or small.
- Remind the focus person that they are not expected to defend or respond – just to listen and take notes.
- Establish basic ground rules.

4. Manage group dynamics

- Watch for dominant voices – politely invite quieter members to contribute too.
- Keep the group energy balanced: if it starts to drift into critique or advice-giving, gently steer it back to idea-sharing.
- Celebrate diversity of thinking. Encourage participants to build on each other's ideas using phrases like "Yes, and…"
- Encourage the focus person to listen actively during the idea-sharing phase – this is a harvesting moment, not a discussion.

5. Debrief thoughtfully

- Always reserve time for a group reflection. Ask what worked, what surprised them, and how they felt during the process.

6. Adapt to workshop context

- The method works best with a smaller group – no more than 10 people.
- For in-person (as described here): provide sticky notes, flipcharts, or printed templates for each focus person to collect input.
- For online sessions: use shared whiteboards, or collaborative docs for idea capturing.

7. Keep the energy positive

- Encourage creativity and curiosity over perfection.
- Use humour, warmth, and enthusiasm to maintain engagement throughout.

8. Avoid these common pitfalls

❌Letting the group turn the session into a problem-solving or critique circle.
❌Allowing one person to dominate or dismiss others' ideas.
❌Skipping the intro or debrief – these are critical for clarity and reflection for every group activity.

3.5. Module 5 – Cooperation within innovation partnerships

3.5.1. PESTEL Analysis

Method description

PESTEL analysis (Political, Economic, Social, Technological, Environmental, Legal) is a very useful tool not only in strategic planning, but also in designing and implementing innovations, especially in the context of identifying opportunities, threats and resources in the organisation's environment.

Below you will find professional and detailed tips for the trainer on how to use PESTEL analysis in training work with innovation management participants – in an engaging, practical and business-related way.

Objective of using PESTEL in innovation training.
This method is used to help participants:

- map external factors influencing innovation,
- identify barriers and opportunities in the environment,
- uncover potential areas for innovative activities,
- connect environmental analysis with organisational resources and innovation planning.

How to use this method?

Step-by-step guide for facilitating the PESTEL workshop during the innovation management training:

Step 1: Introducing the method

Present the PESTEL method and its relevance to innovation.

Duration: 15–20 minutes

Trainer's actions:

- Briefly explain what the PESTEL analysis is — show a slide/handout with definitions of the 6 categories.
- Explain its application in innovation management: e.g., how new regulations (L) or social changes (S) can drive or require innovation.

Tip: Use a real-life example from the participants' industry, such as ESG, AI, or the Green Deal.

Step 2: Group diagnostic exercise – PESTEL mapping

Divide participants into small groups and provide them with the PESTEL template.
Guide groups through identification of external factors and their impact.
Duration: 45–60 minutes

Objective: Participants will map external factors influencing their organisation or innovation projects.

Trainer's actions:

1. Divide participants into groups (4–6 people).
2. Each group receives a PESTEL template (on flipchart paper or PDF).
3. Groups analyse:
    - What key external factors currently influence your organisation in each PESTEL category?
    - What factors may emerge in the next 2–3 years?
    - Which of these factors pose threats and which offer opportunities for innovation?

PESTEL Template – Participant worksheet
Use this worksheet to identify external factors that influence your organisation's innovation potential. Fill in the table by listing specific factors, assessing whether they present opportunities or threats.

PESTEL Factor	Example Factors	Opportunities	Threats
Political			
Economic			
Social			
Technological			
Environmental			
Legal			

Instructions for participants:

- Be as specific as possible: talk about regulations, trends, phenomena.
- Evaluate the strength and impact of each factor.

Step 3: Group presentations and aggregated map

Have groups present findings and build a collective PESTEL map.

Duration: 30 minutes

Each group presents their findings. The trainer collects key factors into a collective PESTEL map (on a whiteboard, shared screen, or collaborative tool like Miro).
Optional enhancement: Use colour codes — e.g. green (opportunities), red (threats), blue (neutral).

Step 4: Linking to organisational resources and innovation potential

Lead a reflection linking external factors to internal resources and capabilities.

Duration: 30–45 minutes

Trainer's actions:

- Facilitate reflection and move to internal analysis:
  - Which external factors require an innovative response?
  - Does the organisation have the necessary resources (human, technological, organisational) to respond?
  - Where are the competency gaps?
  - Are there areas where the organisation can gain a competitive edge as an innovator?

You can use a simple matrix like this:

Aggregated PESTEL Analysis Matrix – For Group Discussion

Use this matrix to connect external PESTEL factors with internal organisational resources and identify strategic innovation actions.

PESTEL Factor	Opportunity/Threat	Our Resources	Required Innovation Actions

Step 5: Translating the analysis into ideas or projects

Encourage each group to identify 1–2 innovation initiatives.
Duration: 45 minutes
Invite groups to generate 1–2 innovation ideas that:

- respond to identified PESTEL factors,
- leverage internal strengths,
- can be developed after the training session.

Trainer's role – key recommendations

- Facilitate, don't judge. Help participants reach their own conclusions.
- Ask probing questions, such as:
  "What technological changes in your industry could disrupt your current business model?"
- Use examples from different sectors — this helps open up thinking and break out of organisational silos.
- Encourage synergy — one factor may be a threat to some and an opportunity to others.

3.5.2. Group task: Cooperation in innovation partnerships

Method description

This exercise takes the form of a group task in which participants will practice key aspects of cooperation in innovation partnerships, including communication, role division, and joint decision-making.
The exercise is based on the following instructions, which are given to each team.

Group Task Instructions

You are representing an organisation (e.g., a tech company, research institute, startup, NGO) that has been invited to join an innovation partnership.
The partnership's goal is to develop a breakthrough solution in a defined area (e.g., sustainable energy, artificial intelligence, future medicine).
Your task is to collaboratively develop an initial cooperation strategy.

Please address the following questions as a team:

1. What are your key resources and competencies that you bring to the partnership?
2. What are your expectations from the other partners?
3. How will you divide roles and responsibilities within your team?
4. What potential challenges might arise in this collaboration, and how will you address them?
5. What will be the first three steps in implementing your cooperation?

Cooperation Strategy Worksheet

Organisation Name / Type: _____
Topic / Innovation Field: _____
Team Members: _____

1. Key Resources and Competencies

_____
_____

2. Expectations from Partners

_____
_____

3. Internal Role Division

_____
_____

4. Anticipated Challenges and Solutions

_____
_____

5. First 3 Implementation Steps

1. _____
2. _____

3. _____

Trainer Preparation

- Prepare a visual aid (slide or handout) outlining the task scenario and questions.
- Arrange the room to support teamwork (tables, breakout spaces, flipcharts).
- Prepare flipchart paper, markers, and timers.
- Optionally assign or allow groups to choose the type of organisation they represent (e.g., tech company, NGO, university lab, startup).

How to use this method?

Step-by-step guide for facilitating the group task during the innovation management training:

Step 1: Introduce the Exercise

Explain that the purpose of this task is to simulate real-world innovation partnerships.
Emphasise the focus on practical collaboration skills: strategic alignment, negotiation, delegation, and communication.

Step 2: Form the Groups

Divide participants into teams of 4–5.
Ensure diverse experience and perspectives if possible.
Assign or let them choose their "organisation type" (e.g., research institute, tech start-up, NGO, corporate R&D).

Step 3: Present the Scenario

Introduce the common challenge: each organisation is invited to a cross-sector innovation partnership (e.g., in AI, climate tech, future healthcare).
Clarify that the aim is to co-create an initial collaboration strategy.

Step 4: Explain the Task

Each team should develop a cooperation strategy by addressing the following questions:

- What are your key resources and competencies that you bring to the partnership?
- What are your expectations from the other partners?
- How will you divide roles and responsibilities within your team?
- What potential challenges might arise in this collaboration, and how will you address them?
- What will be the first three steps in implementing your cooperation?

Remind participants they have 30 minutes to work.
Encourage the use of flipcharts or slides for clarity.

Step 5: Group Work (30 minutes)

Let participants work independently.
As a trainer, walk around, observe team dynamics, and offer guidance when needed.

Use prompting questions like:

- "What risks have you considered?"
- "How does your organisation type affect your approach?"
- "How are you ensuring alignment between partners?"

Step 6: Group Presentations (5 minutes per team)

Each team presents their cooperation strategy to the plenary.
Use a timer to manage time effectively.
Encourage clear, structured presentations – consider allowing visuals or flipcharts.

Step 7: Trainer-led Debrief and Discussion (15–20 minutes)

Facilitate a reflection and feedback discussion:

- What were similarities and differences between strategies?
- Which strategies felt most actionable or creative?
- What role did communication or negotiation play in team dynamics?
- Were there any conflicts in assigning roles or setting expectations?
- How did teams anticipate and plan for challenges?

Conclude with a summary of:

- Best practices in innovation collaboration
- Common pitfalls (e.g., lack of clarity, mismatched expectations)
- Importance of mutual benefit and trust

Trainer Tips

- Encourage groups to take ownership of their "organisational identity".
- Emphasise systems thinking and stakeholder alignment.
- Remind teams to balance strategic vision with operational feasibility.
- If time allows, prompt inter-group questions or feedback after presentations.
- Capture common themes on a whiteboard or flipchart during debrief.

3.6. Module 6 – Planning innovation

3.6.1. Collective Strategic Framing

Method description

This exercise is about creating a shared understanding of your organisation or team's identity, priorities, and long-term direction. It builds alignment and focus, ensuring that innovation efforts and daily decisions are grounded in a clear sense of purpose.

The process begins with the golden circle, a tool for defining your WHAT, HOW, and WHY. Then, the group agrees on strategic anchors (what you always do) and strategic trade-offs (what you never do), and finally articulates a compelling 5-year innovation vision.

Together, these elements create the foundation for smart decisions, focused innovation, clear communication, and a strong team culture. Without them, teams risk drifting, losing alignment, and wasting energy on efforts that don't serve their purpose. This is not a nice-to-have, it is a strategic must.

Why the method works

- Clarifies shared purpose and direction
- Surfaces implicit assumptions and values
- Aligns team members around strategic priorities
- Provides a filter for future decisions (including innovation)
- Enhances motivation through shared ownership

How to use this method?

This exercise is best done as a **half-day workshop** (approx. 3 hours). It works well with leadership teams, project groups, or cross-functional teams who need to align on purpose, principles, and direction.

Use a whiteboard, flipchart, or digital tool like Miro to make the process visible and collaborative. Move step by step through the Golden Circle, Anchors, Trade-offs, and Vision — and give enough space for reflection and dialogue, but keep the pace high.

Skip Vision if short on time and let it emerge naturally through the innovation system work.

You don't need to get everything perfect — the goal is shared clarity that is good enough to guide action.

Step 1 – Golden circle (Start with WHAT → HOW → WHY)

Duration: approximately 45 minutes

The Golden Circle is a simple but powerful framework that helps teams explore their identity and purpose. In this version, we start with WHAT, because it is the most concrete starting point. From there, we unpack the HOW and eventually arrive at the deeper WHY.

Gather the group in front of a whiteboard, flipchart, or digital board (e.g., Miro). Ask the following questions and write down key phrases or themes.

1. WHAT do we offer?
   What are the tangible products, services, or experiences we create and deliver?
   Cluster the value propositions based on different customer segments.

2. If this is what we do, HOW do we do it?
   What methods, principles, or values guide how we work?
   What makes us unique in the way we operate?

3. If this is how we do it, then WHY is that important?
   What deeper purpose drives our work?
   What change are we trying to create in the world?
   Who benefits if we succeed?

Loop back to ensure alignment

You have started with something concrete and unifying (WHAT) and unpacked the methods (HOW) behind it. Now that a shared WHY has emerged, loop back and ask:

“Does our HOW support this WHY?”
“Does our WHAT reflect this purpose?”

This back-and-forth helps the group refine their thinking and ensure that actions, methods, and mission are aligned.

Step 2 – Define anchors (What are we always doing?)

Duration: approximately 30 minutes

Anchors are your team’s or organisation’s non-negotiables — the consistent behaviours, mindsets, or principles you stick to, no matter the project, context, or challenge. They keep you grounded and aligned, even when everything else is changing.

Refer back to your Golden Circle. Ask the group:
“What are we always doing, regardless of the situation or project?”

These should reflect deeply held principles or repeated behaviors — not slogans, goals, or nice-sounding words.

Examples:
“We put learners first” (educational company)
“We start by building trust” (construction company))
“We create meaningful connections” (cafeteria)

Try to identify 2–3 clear, powerful anchors that people can actually recognise in everyday actions, not just aspirations. For more guidance on what qualifies as an anchor, see Module 6, Unit 2.

Step 3 – Define Trade-offs (What are we never doing?)

Duration: approximately 30 minutes

Every clear strategy involves making choices and that means saying no to certain paths, even when they seem attractive, profitable, or common in your industry. Defining trade-offs gives your team the clarity and courage to stay focused on what truly matters.

Invite the group to reflect and discuss:
“What do we actively choose not to do — even when it is tempting, expected, or easy?”

These trade-offs should reflect your values and strategic boundaries. They help protect your focus, integrity, and long-term vision.

Use the ✕symbol to mark them on your board or template.

Examples:
“We never prioritise profit over learner outcomes.” (educational company)
“We don’t compromise on safety – ever.” (construction company)
“We don’t use refined sugars or artificial sweeteners” (cafeteria)

Aim to identify 2–3 clear trade-offs that people can use as filters in real decisions. Make sure your trade-offs are specific and actionable, not generic or vague (e.g., “We never compromise” does not help guide actual choices). For more guidance on what qualifies as an anchor, see Module 6, Unit 2.

Step 4 – Craft an innovation vision (5 years ahead)

Duration: approximately 30 minutes

Now that the group has a clearer sense of what they do, how they do it, and why — it is time to imagine the future.

Ask:
"If we stay aligned with our purpose and principles, where could we be in five years?"

Encourage a balance of:

Impact: Who are we reaching? What is the change we have made?
Capacity: How big is our team, community, or influence?
Identity: What are we known for?

Capture the vision in a few bold statements or a short paragraph.

Step 5 – Debrief (How is this useful?)

Duration: approximately 30 minutes

End the session by guiding the group to reflect on how the insights from this exercise can support real decisions, actions, and innovation efforts. Invite them to connect today's work to their ongoing challenges and opportunities.

Use some of the following example questions to spark reflection:

- What surprised you or shifted your perspective?
- What insights felt most useful or energising?
- How could our Golden Circle or Anchors help us navigate current challenges?
- How will you apply these principles in your daily work?
- What is a small step we can take today to start living our 5-year vision?

Encourage honest, practical reflections — the goal is to build commitment and clarity for what happens next.

Trainer's role – key recommendations

- Use visual aids
  Provide flipcharts, templates, or digital boards (e.g., Miro, Jamboard) to capture and cluster input in real time.

- Encourage every voice
  Use silent writing, round-robin sharing, or small-group discussions to ensure all

participants contribute — not just the most vocal.

- Invite honesty and depth
  Encourage participants to move beyond buzzwords. Ask follow-up questions like: "What does that really mean in practice?" or "Can you give an example?"

- Keep a high pace
  Set time limits for each part of the exercise to maintain energy and focus.
  For example: "5 minutes to define WHAT, 5 for HOW, 5 for WHY."

- Listen and adapt
  While structure is important, remain responsive to the group's energy and needs. Slow down for rich discussions, or speed up if momentum drops.

3.6.2. Create an Innovation Management System

Method description

Once you have defined your strategic foundation (purpose, principles, and vision), the next step is to build a lightweight innovation management system: simple enough to use, but structured enough to support real learning and change over time.

The goal is to design two core components:

1. A system for collecting insights and ideas from both inside and outside the organisation.

2. A structure and rhythm for developing and testing prototypes that are aligned with your strategy.

This helps turn inspiration into action — making innovation a continuous, shared practice instead of a one-time initiative.

Why the method works

- Brings consistency to innovation without adding heavy bureaucracy
- Encourages collaboration and ownership across the team
- Connects daily learning to long-term strategic goals
- Helps prioritise high-impact ideas over low-value distractions
- Supports a culture of experimentation and feedback

How to use this method?

This exercise is best run as a **full-day workshop** (approx. 6 hours including breaks). It is designed for teams or departments that are ready to turn strategy into practice through lightweight structures and shared ownership.

Start by dividing the group into two smaller teams — one focused on collecting insights and ideas, the other on testing and prototyping. Give them space to design and sketch their systems visually before aligning as a full group.

Move quickly, keep it practical, and remind everyone: this is a prototype — it does not need to be perfect. The goal is to build something **good enough to test, learn from, and improve together**.

Feel free to adapt the structure based on the group's needs and size. You can focus on just one system or one part of the exercise, or split it into two shorter sessions with homework or follow-up work between them.

Step 1: Intro – Why build an Innovation Management System (IMS)?

Duration: approximately 30 min

As a small team or entrepreneur, you probably already do a lot of innovation — you spot needs, test new offers, and adjust fast. But when you are busy running day-to-day operations, even your best ideas can fall through the cracks. Things stay in your head, or energy fizzles out before anything gets implemented.

That is where a lightweight innovation management system comes in.

It is simply a way to:

- Catch and organise insights from your customers, team, and environment
- Turn the best ideas into real experiments — and learn from them
- Stay aligned with your strategy and values as you grow

Why this matters for your business

This system builds directly on the work you have already done:

- Your Golden Circle tells you what you do, how you do it, and why it matters.
- Your Anchors and Trade-offs define your boundaries and strategic focus.
- Your Customer Journey and Business Model help you understand what matters to the people you serve.

This next step is about connecting all of that to how you work with ideas over time — in a way that is realistic, simple, and actually useful.

Let the group reflect together:

- When do we have good ideas — and what happens to them?
- Where do we see signals of what to improve or try next?
- How do we make sure new ideas match our values and business model?
- What would change if we had a clear, shared way to move ideas forward?

This does not have to be perfect — just good enough to test and learn from.
You are not building a system to slow you down. You are building one to help your best

ideas survive and thrive.

Step 1: Divide into two working groups

Duration: approximately 120 min group work, including intro.

Split participants into two small teams. Each group will design one half of the innovation system.

- **Group 1: Collecting Insights & Ideas**
- **Group 2: Developing & Testing Prototypes**

Give them templates, boards (e.g. Trello or Miro), or flipcharts to sketch their systems

Instructions group 1

This group's task is to create a simple but robust process to gather, document, and review insights from:

- Customers
- Team members
- Stakeholders
- Market and trend data

a) Define the insight collection system

Use these guiding questions to build your system:

- What types of insights do we want to collect?
  (e.g. customer pain points, internal friction, emerging trends)

- Where do we get them from?
  (e.g. interviews, customer journey mapping, surveys, competitor analysis)

- How do we document them?
  (e.g. Trello, Notion, shared Google Sheets)

b) Create an Insight collection system

Set up a simple, accessible Insight Board (e.g. in Trello, Miro, Notion, or on a wall) to capture and organise what you are learning — and what it could lead to.

The board should:

- Make it clear where the insight came from (e.g. customers, team experience, trend signals, internal feedback)
- Provide a space to add ideas or questions based on those insights
- Assign responsibility: who is in charge of keeping the board clean, up-to-date, and easy to access for the whole team

Tip: Keep it simple. The board is a shared thinking space — not a project tracker.

Instructions group 2

This group designs the process for turning prioritised ideas into small, testable prototypes.

a) Innovation meeting structure

Design the regular meeting where ideas move from backlog to action:

- When do we meet?
  (e.g. quarterly, monthly, or bi-monthly)

- Who is involved?
  (Cross-functional mix – not just managers)

- What is the agenda?

  For example:
  - Review recent insights
  - Prioritise using a tool (e.g. value/effort matrix)
  - Select one idea for prototyping
  - Allocate time and budget
  - Assign roles

See Module 6 unit 4 and Module 6 workbook p. 18 for more information and inspiration of setting up an innovation meeting structure.

b) Between meetings: weekly stand-ups

To keep prototypes moving, define a simple check-in format:

- How often?
  (e.g. weekly or every two weeks)

- What is the structure?
  - What are we testing right now?
  - What did we learn?
  - What is blocked?

c) Set up a lightweight tracker (e.g. Trello, Miro, Google Doc) to follow each prototype.

Keep it simple — for example, you might include:

- What idea is being tested and why (hypothesis)
- Who is responsible and what stage it is in
- Outcomes, what you have learned and what is next

Use a format that works for your team — the goal is visibility and learning.

Step 2: Share and align

Duration: approximately 60 min

Bring both groups back together. Each group presents their proposed system to the whole team.

As the facilitator, guide a focused review:

- What looks promising or energising?
- Is anything missing or unclear?
- Is the system realistic to implement?
- Does it align with our strategic anchors and trade-offs?

After the discussion, give the groups some time to update their systems and make any necessary adjustments based on feedback.

This step is about integration — making sure the systems are not only functional but aligned with each other and your larger purpose.

Step 3: Plan a test run

Duration: approximately 60 min

Agree on a trial period to test the system – for example, two innovation meetings with insight collection, idea selection, and short stand-ups between.

What needs to be finalised before the test run?
This is a prototype. It doesn't have to be perfect. But to make the test useful, make sure the following is in place:

1. Roles are assigned
   Who leads the process? Who is responsible for the insight board, meeting facilitation, and follow-up?

2. Tools are set up
   Choose simple tools (e.g. Trello, Miro, Google Docs) and make sure everyone can access and use them.

3. Timeline is agreed
   When will the innovation meetings and stand-ups happen? When will we review and reflect?

4. Resources are secured
   Time, team capacity, and any small budget or workspace needed for the prototype.

5. Scope is defined – Are we testing this with a pilot team or the whole organisation?
   Success criteria is clear – What will we look for to know if this structure is helping?

Start small, stay flexible, and focus on learning – not on getting everything right the first time.

Step 4: Debrief – what becomes possible.

Duration: approximately 30 minutes

Use these questions to help the group reflect on the deeper meaning and consequences of what they have created — not just for themselves, but also for others around them.

Suggested reflection questions:

- What did you learn today? If anything surprised you, what was it?
- Who will be affected by how we use this system, and how can we make sure it truly serves them?
- What becomes possible if we keep using this system well?

- What risks or blind spots do you see — and how do we need to address them?

Use these prompts in an open group reflection or journaling session. The goal is to shift from "what we made" to "what this makes possible."

Trainer's role – key recommendations

- **Keep it real – focus on felt value**
  Help participants connect the system to real work. Ask:
  "How could this help you tomorrow?"

- **Foster a "safe enough to try" mindset**
  Encourage quick, imperfect action over waiting for perfect plans.
  "Is it good enough for now? Then let's try it."

- **Be visual – sketch before you implement**
  Encourage the group to map, draw, or storyboard their system before jumping into tools. Visualising helps clarify and align ideas.

- **Listen and adapt**
  Stay responsive to the group's energy and needs. Let them take the lead as much as possible.

- **Support shared decisions and ownership**
  Use simple methods (e.g. thumbs up, majority vote) to help the group decide together.

- **Keep momentum over perfection**
  Gently steer the group forward when stuck.
  "What's the simplest version we can test?"

3.7. Module 7 – Protecting Ideas

3.7.1. Case Study Analysis & Group Problem-Solving

Method description

This module provides a foundational understanding of intellectual property (IP) protection and strategic IP management, supported through a structured combination of interactive learning methods designed to promote engagement and critical analysis. The use of case study analysis is particularly appropriate for this unit as it allows participants to examine authentic scenarios of IP management, infringement, and compliance. This method supports the development of analytical and problem-solving skills, enabling learners to interpret European IP regulations, assess risks, and determine appropriate protection strategies. Guided group discussions complement this approach by encouraging the exchange of perspectives and the collaborative evaluation of potential solutions, which mirrors real-world decision-making in business and entrepreneurial contexts.

How to use this method?

Select a relevant IP case study from the course materials, such as Blackberry's Downfall (Unit 1: Introduction to IP Management), Google vs. Oracle (Unit 2: Legal Diversification: Copyright Protection), the Apple vs. Samsung legal dispute or L'Oreal's Anti-Counterfeit Strategy (Unit 3: Compliance Essentials). Distribute the case summary to participants and give them time to review it individually, asking them to identify the key IP assets, potential risks, and any legal considerations. Divide participants into small groups and instruct them to analyse the case collaboratively, develop a response plan, and propose strategies for protecting the company's intellectual property. After the group discussions, invite each team to share its recommendations, highlighting the reasoning behind their proposed actions. Guide a plenary discussion to compare different approaches, clarify misconceptions, and link the exercise to European IP frameworks and best practices. This approach will enable participants to immerse in real-world scenarios, strengthen analytical and decision-making skills, and build confidence in applying IP concepts to practical business challenges.

Learning outcomes

Learning outcomes using the case study & group discussion method:

- Identify and classify relevant IP assets in a business scenario, distinguishing among copyright, trademarks, patents, and trade secrets.
- Diagnose risks and compliance gaps against European IP and data- protection frameworks, interpreting applicable standards and obligations.
- Formulate protection and enforcement strategies that include registration, licensing, monitoring, and dispute- resolution options proportionate to the case.

- Justify strategic choices that align IP management with organisational objectives and anticipated market expansion, using evidence from the case.
- Communicate and defend recommendations through clear, collaborative argumentation that evaluates alternatives and acknowledges trade- offs.

Step 1: Select and introduce the case

Duration: 15 minutes

Use a concise briefing of a relevant IP case from the course library (e.g., The Blackberry Downfall, Google vs. Oracle 2021). Clarify the learning objectives, the European IP frameworks in scope, and the guiding questions participants should keep in mind during analysis.

Trainer responsibilities:

- Choose an appropriate case and provide a focused 1–2 page brief with context, issues, and guiding questions.
- Set expectations on outputs (e.g., risk identification, protection strategy) and timing.

Step 2: Individual case analysis

Duration: 20 minutes

Give participants quiet time to review the case, identify the IP assets at issue, and note likely risks, infringements, and applicable legal standards. Provide a short worksheet or template to structure their notes.

Trainer responsibilities:

- Distribute a worksheet that prompts asset classification, risk diagnosis, and relevant legal hooks (copyright, trademarks, patents, trade secrets, GDPR).
- Monitor progress and clarify procedural or definitional questions without steering toward a single answer.

Step 3: Group synthesis and strategy development

Duration: 40 minutes

Form small groups (3–5) to compare individual findings and converge on a prioritised problem statement. Instruct groups to produce a concise protection/enforcement plan covering registration, licensing, monitoring, and escalation options with brief justifications.

Trainer responsibilities:

- Provide a one- page strategy template (problem, options, recommended actions, rationale, risks).
- Circulate to probe assumptions, ensure evidence- based reasoning, and keep groups on time.

Step 4: Report- out and critique

Duration: 30 minutes

Invite each group to present its recommendations in a strict time window. Lead a whole- class critique that compares approaches, surfaces trade- offs, and links proposals to European IP standards and good practice.

Trainer responsibilities:

- Enforce presentation time limits and facilitate equitable participation across groups.
- Anchor feedback in the relevant legal frameworks and correct misconceptions succinctly.

Step 5: Debrief and transfer

Duration: 15 minutes

Conclude with a synthesis of key insights, highlighting patterns across the solutions and the criteria that distinguish robust IP strategies. Assign a short reflective prompt on how participants will adapt the approach to their own projects.

Trainer responsibilities:

- Summarise three to five takeaways and provide a practical checklist for immediate application.
- Set an optional follow- up task (e.g., draft an IP action step for their context) and indicate how it will be reviewed.

Recommendations for the trainer

- Prompt participants to raise questions about unclear IP concepts, legal distinctions, and strategic implications to deepen understanding.
- Ask learners to justify their case study decisions and explore alternative strategies rather than accepting surface- level answers.
- Ensure all group members contribute during discussions and presentations, preventing domination by a few voices.
- Remind participants to support their conclusions with legal principles, case facts, and business rationale.
- Use debrief sessions to highlight strong analytical approaches, correct misconceptions, and connect insights to real- world IP management practices.

Materials needed

- Case study handouts
- IP classification and strategy worksheets for individual and group analysis
- Flip charts, markers, and sticky notes for visualising group findings and strategies
- Projector or screen for displaying key points, legal frameworks, and debrief visuals

- Reference materials (summaries of EU IP regulations, GDPR guidelines, and relevant WIPO resources)

3.8. Module 8 – Turning ideas into reality

Method description

The recommended method for delivering Module 8 is the **Experiential Project-Based Innovation Cycle (EPIC)**, which helps you balance theory with practical, hands-on learning. In each unit, you start with a short introduction of key concepts, then guide participants through a group activity where they apply tools and frameworks, facilitate peer-sharing for reflection and feedback, and close with a short wrap-up linking the activity back to ISO 56000 principles. This way, your sessions remain interactive and participant-driven, while still grounded in internationally recognised standards of innovation management.

You will keep participants working in **small, stable groups** of 3–5 people. These groups will carry the same challenge or problem through all four units, progressively transforming it from a **problem statement** into a structured idea, then into a **prototype**, and finally into a **scaling roadmap**. Your role is to act as a facilitator rather than a lecturer—guiding the process, asking critical questions, and making sure participants stay aligned with ISO guidelines.

The method emphasises **learning by doing**, so instead of passively listening to theory, participants will engage in collaborative problem-solving, structured reflection, and peer feedback. You will introduce tools such as the **5 Whys**, **Business Model Canvas**, **rapid prototyping**, and the **Scaling Roadmap**, then immediately let participants apply them to their own cases. This practical approach allows learners to test and refine their ideas in real-time. By keeping your input concise and focusing on targeted group tasks, you ensure that each unit is completed within one hour while keeping the energy dynamic and efficient.

Finally, you should always link the EPIC method back to the **ISO 56000 family of standards**, particularly ISO 56002. At the end of each unit, use a short wrap-up to connect participant activities to ISO principles, such as root cause analysis, value creation, iteration, risk management, and systematic deployment. This way, participants gain not only practical skills but also an understanding of how these skills fit within a globally recognised innovation management framework. By the end of Module 8, you will have guided them through the full cycle of turning ideas into reality, leaving them equipped with tools and approaches they can confidently apply in their professional environments.

How to use the EPIC Method to Deliver Module 8

To begin, form participants into **small, stable groups of 3–5 people** at the start of the module. Each group will select or be assigned a real-world challenge to work on throughout all four units. This continuity is crucial, as it helps participants see the full innovation cycle in practice rather than working on disconnected exercises. Encourage them to treat this challenge as their “mini-project” for the duration of the training.

In each unit, you should keep the same structure: **brief introduction (10 minutes), group activity (25 minutes), peer-sharing (15 minutes), and wrap-up (10 minutes)**. The introduction allows you to explain the concept and connect it to ISO 56000 standards. The group activity is where participants learn by applying the tool (e.g., 5 Whys, Business Model Canvas, prototyping, or Scaling Roadmap) to their project. The peer-sharing gives them the chance to present, test, and get feedback from others. Finally, the wrap-up ensures they understand the relevance of what they just did and how it connects to structured innovation management.

As you guide the process, keep your facilitation focused and practical. Use real examples to illustrate concepts, but avoid long lectures. Walk around during group work, asking probing questions and helping groups stay on track. Encourage critical thinking, reflection, and iteration, as these are central to ISO 56002. At the end of each unit, explicitly highlight the connection between the activity and ISO principles such as root cause analysis, value creation, iteration, and deployment. By following this approach, you will ensure that learners not only understand the theory but also leave the training with tangible skills and tools they can apply directly in their professional contexts.

Preparatory Steps

Step 1 – Understand the Training Flow (30–45 minutes of prep)

What to do: Review all four units (Problem → Structure → Prototype → Scale) and map out how they connect. Identify which ISO 56000/56002 principles you will highlight at the end of each unit. Prepare 1–2 simple real-world examples to illustrate concepts.

Example: Before Unit 1, prepare an example of using the **5 Whys**: *"Why are students dropping out of online courses?" → dig down to root causes like "lack of digital support."* You can use this example to illustrate the technique before group work.

Step 2 – Prepare Materials (45–60 minutes of prep)

What to do: Print/digitally prepare templates and materials for group activities:

Unit 1: 5 Whys worksheet.

Unit 2: Business Model Canvas template.

Unit 3: Prototyping materials (sticky notes, markers, paper, tape, or digital tools like Miro).

Unit 4: Scaling Roadmap template (target market, resources, partners, risks, timeline).

Example: Print 5 large BMC posters (one for each group) and cut sticky notes for participants to fill in customer segments, resources, etc. This keeps the session active and visual.

Step 3 – Set Up the Learning Environment (20–30 minutes before the session)

What to do: Arrange the room into small group clusters (3–5 people per table). If online, set up breakout rooms in advance. Display the overall flow of Module 8 on a flipchart or slide so participants know what journey they will take. Have a visible timer or time-tracking app.

Example: On a flipchart at the front of the room, write:

Unit 1: Define the problem.

Unit 2: Structure the idea.

Unit 3: Prototype & test.

Unit 4: Scale & deploy.

This gives participants a visual "roadmap" of the training.

Step 4 – Assign Challenges (15–20 minutes at start of Module)

What to do: Ask participants to propose challenges from their work context, or provide challenges prepared in advance if time is tight. Keep them broad but realistic. Each group will carry their chosen challenge through all four units.

Example: Provide a menu of challenges, such as:

"How might we reduce food waste in schools?"

"How might we improve digital upskilling for unemployed youth?"

"How might we increase adoption of sustainable tourism practices in small businesses?"

This way, if participants cannot think of a challenge quickly, you still have some starting points available.

Step 2: Steps During Facilitation of Module 8

1. Introduction (≈10 minutes)

- **What you do:** Present the key concept of the unit briefly, connect it to ISO 56000/56002, and give one practical example.
- **Example:** In Unit 3, explain "Prototyping doesn't need to be perfect. A sketch or a mock-up is enough to test ideas" and show a sample paper prototype.

2. Group Activity (≈25 minutes)

- **What you do:** Guide participants as they apply the tool (5 Whys, Business Model Canvas, prototype building, or roadmap). Circulate around the groups, ask clarifying questions, and support struggling teams.
- **Example:** In Unit 2, a group is stuck on "Customer Segments." Ask guiding questions like: "Who benefits most from your solution? Who would pay for it?"

3. Peer Sharing & Feedback (≈15 minutes)

- **What you do:** Have groups present outputs briefly (problem statement, BMC highlights, prototype demo, or roadmap pitch). Encourage structured feedback from peers: What works well? What could be improved?
- **Example:** In Unit 4, groups present scaling roadmaps. Ask peers: "What risks do you see? What resources did they miss?"

4. Wrap-up (≈10 minutes)

- **What you do:** Summarise key insights, highlight links to ISO standards, and connect to the next unit. Reinforce the "big picture" of moving through problem → solution → prototype → scale.
- **Example:** After Unit 1, say: "By framing problems clearly, you have laid the foundation for solutions that truly create value — this reflects ISO's principle of systematic problem analysis."

Step 3: After Facilitation of Module 8

After completing all four units, you should consolidate the participants' learning and ensure they leave with actionable insights.

1. Showcase & Reflection (20–30 minutes)

- **What you do:** Organise a **gallery walk** (if in person) or group presentations (if online). Each group displays their problem statement, BMC, prototype, and scaling roadmap.
- **Example:** Groups pin their canvases and roadmaps on the wall. Participants walk around, ask questions, and leave sticky-note feedback.

2. Reflection Circle (15–20 minutes)

- **What you do:** Facilitate a discussion where participants share their biggest takeaways. Use reflection prompts.
- **Example prompts:**
  - "What part of the process was most valuable for you?"
  - "How could you apply these tools in your daily work?"
  - "What challenges could arise when using this method?"

3. Connect Back to ISO 56000 (10 minutes)

- **What you do:** Revisit the ISO principles: systematic innovation, value creation, risk management, iteration, and scaling. Show participants how their group projects are aligned with these principles.
- **Example:** Point out how **root cause analysis (5 Whys)** reflects ISO's emphasis on addressing underlying needs.

4. Closing & Next Steps (10 minutes)

- **What you do:** Summarise Module 8, thank participants, and provide further reading/resources (e.g., ISO 56002 guidelines, suggested books). Encourage them to apply the tools to real challenges in their organisations.

Recommendations for the trainer

- Keep theory short & practical.

- Facilitate with questions, not lectures.

- Normalise mistakes as part of innovation.

- Maintain high energy & interactivity.

- Always connect outputs to ISO 56000.

- Close with personal commitments for real application.

3.9. Module 9 – Tracking progress of innovative projects

Method description

This module introduces participants to the critical role of monitoring and evaluation (M&E) in managing innovation projects. Through a combination of interactive and experiential training methods, participants learn to define, measure, and analyse key performance indicators (KPIs), use critical and analytical thinking, and communicate findings in a constructive and impactful way. The module uses simulations, data exercises, structured reflection, and team activities to develop skills in data interpretation and evidence-based decision-making.

How to use this method?

Trainers should blend technical instruction with active learning. This module is best facilitated in a workshop format that allows for progressive learning: moving from defining M&E concepts to applying them in realistic scenarios. Include moments of peer review, role play (e.g., stakeholder briefings), and integrate both qualitative and quantitative data examples. Adult learners benefit from real-life relevance, so trainers should encourage participants to use and work on their own innovation project examples.

Learning outcomes

By the end of this module, participants will:

- Understand the distinction and role of monitoring and evaluation in innovation projects
- Identify and design appropriate indicators and metrics
- Apply research methods and tools to measure project progress
- Develop effective evaluation reports and present findings visually
- Practice critical and analytical thinking in assessing innovation project performance
- Use M&E processes to support learning, adaptation, and decision-making

Step 1: Foundations of Monitoring and Evaluation (M&E)

Duration: 30 minutes

Trainer's responsibility

- Present definitions of monitoring and evaluation in innovation projects
- Introduce key terms: input, process, output, outcome, impact

- Conduct a short matching game using flashcards (term vs. definition)

Step 2: Understanding Evaluation Types and M&E Roles

Duration: 30 minutes

Trainer's responsibility

- Explain the types of evaluation: ex-ante, ongoing, ex-post
- Highlight the difference between evaluation and monitoring roles
- Facilitate discussion: "Which type of evaluation fits different stages of your project?"
- Use a role-playing exercise to simulate evaluation conversations between project leads and stakeholders

Step 3: Research Methods, Techniques, and Tools

Duration: 45 minutes

Trainer's responsibility

- Describe the differences between methods (quantitative, qualitative, mixed), techniques, and tools
- Use a quiz competition: match project needs to suitable methods and tools
- Assign teams to develop a mini M&E plan including a method, technique, and tool

Monitoring and Evaluation Plan Template

This template outlines the key components of an M&E plan.
Fill in each section for your project.

- Project name:
- Project objective:
- Evaluation purpose and scope:
- Evaluation questions:
- Methods and tools:
- Timeline and milestones:

- Roles and responsibilities:

Step 4: Developing Key Indicators and Metrics

Duration: 45 minutes

Trainer's responsibility

- Present examples of input, process, output, outcome, and impact indicators
- Ask each participant to select a project idea and design 5 indicators using a provided worksheet
- Facilitate peer review: exchange worksheets and provide feedback

Indicator Design Worksheet

Use this worksheet to design key indicators for your innovation project.

Indicator Name	Type (Input, Output, Outcome, etc.)	Data Collection Method	Frequency of Measurement	Responsible Person/Team

Step 5: Tracking and Reporting Progress

Duration: 60 minutes

Trainer's responsibility

- Introduce the M&E process stages: what/when/how to measure, team roles, scheduling, validation
- Group task: simulate a reporting process. Provide mock data and ask teams to generate a simplified report
- Guide participants in visualising both quantitative and qualitative data (e.g., pie charts + quotes)
- Use a design-thinking approach to build a reporting template tailored for different stakeholders

Evaluation Report Template

Use this structure to prepare your M&E report:

1. Executive summary
2. Introduction (purpose, scope, context)
3. Methodology (data collection and analysis)
4. Findings (key insights from data)
5. Conclusions (interpretation of results)
6. Recommendations (future actions and improvements)
7. Annexes (additional data, tools, references)

Step 6: Applying Critical and Analytical Thinking

Duration: 45 minutes

Trainer's responsibility

- Explain principles of critical thinking: questioning assumptions, evaluating evidence, considering alternatives.
- Practice analytical thinking through a bottleneck scenario challenge: identify risks and propose data-based actions.
- Ask participants to reflect in writing: "How will I apply critical thinking in my next innovation project?"

Step 7: Consolidation and Evaluation

Duration: 30 minutes

Trainer's responsibility

- Facilitate an open-space discussion on lessons learned
- Conduct a short post-module quiz or simulation wrap-up game
- Use a 'Takeaway Map': each participant writes down one insight in each of these areas: tool, metric, method, risk, recommendation

Recommendations for the trainer

- Promote an environment of curiosity and objectivity
- Emphasise clarity in data visualisation and communication
- Link evaluation practices to real decision-making impact
- Address emotional aspects of project review – fear of failure, resistance to feedback.
- Highlight how monitoring and evaluation also serve learning and innovation, not just control

Materials needed

- Slide deck with visuals of evaluation frameworks
- Flashcards for games (definitions, indicators, project phases)
- Indicator design worksheets
- Sample datasets for analysis
- Report templates (print and digital)
- Flipcharts and markers