Storyboarding for Innovation

Much of what passes for brainstorming are idea-killing sessions that leave organizations thinking they're not innovative. The technique of storyboarding can remove the worst of these habits and surface both great ideas and a plan of action.

By Barry L. Cross

About the author

Barry Cross joined Queen's University in 2006 after spending 20 years in various leadership positions with Magna International, Autosystems Manufacturing, and DuPont. While in industry, Mr. Cross led many key strategic initiatives, including significant development projects in Asia, Brazil, Mexico, and Europe.

Mr. Cross is now an instructor with Queen's School of Business in Operations Management, Service Management, and Project Management. At the Executive level, he speaks regularly on Innovation, Execution, and Project Management. His speaking and consulting clients include Samsung, Deloitte, Conference Board of Canada, Encana, LCBO, and others. He has an MBA from Queen's University, and is the bestselling author of *Lean Innovation: Understanding What's Next in Today's Economy* (CRC Press).

QSB Insight

Sometimes, you need to be able to force the development of an idea, and storyboarding is one of my favorite ways to do it. I was first introduced to storyboarding as an advertising tool in my first-year MBA marketing course in 1991. Over the last 20-something years, it evolved into a problem-solving and innovation tool as well.

Most companies start with brainstorming, and while there are exceptions, most groups do not brainstorm well. Think about the last time you were in a group idea process, say with eight or 10 people. At one end of the scale are the people who are less comfortable speaking up and may not venture an idea. At the other end are people who are quite comfortable speaking up and offer many ideas. In examples of social Darwinism, people in the room will also tend to follow the lead (and ideas) of meeting bullies or those in the room who rank the highest. As ideas are suggested, they are discussed, often leading to long, tangential dialogues that consume significant time. You will also hear things like, "Yes, but … " or "We tried that a few months ago, and … ," despite an opening comment that "there are no bad ideas!"

The result of an hour's work is often a few ideas, certainly, but more ideas that have been killed or not offered at all. In that environment, it is easy to see why some firms do not believe they are creative or innovative.

Storyboarding resolves many of those issues, mostly by keeping the process anonymous and silent—no opinions, personalities, or negativity. Keep the group small, leave the phones at the door, and block off an hour for the activity. This can be done in person or virtually with some basic intranet programming. Queen's School of Business, for example, uses an electronic version of storyboarding in its Executive Decision Center (EDC). The process is popular; in 2011, the EDC ran 41 facilitations at Queen's and on the road with various clients.

The requirements for the analog version are as follows:
- 5 to 10 people, cross functional if possible
- Sharpie markers, black

- Masking tape
- 3 x 5 cards (about 100)
- Red and green stickers or Sharpies of those colors
- A problem, need, or opportunity
- A neutral facilitator

As the facilitator, distribute markers and 3 x 5 cards to the participants in the room. We start by defining the big hairy problem or opportunity that is the focus. The example I like to use is a new focus for a major hotel chain. The company has hotels in each major category, from budget hotels through the luxury group. In fact, the chain does quite well in the three- and four-star categories, with strong brands and good customer loyalty. Where it struggles, however, is in the budget category. In this group, it seems that all competitors offer the same service and facilities: a small but clean lobby, a small lobby restaurant or dining area, a pool, and a workout room with one or two treadmills. The rooms are reasonably spacious and clean, and the beds are okay. You have probably stayed at properties like this while on the road in a smaller town on business or perhaps with your family on a weekend. All of the chains offer this same hotel concept, which typically means that when more than one occupies the same area of a city, they compete on price. Therein is the core challenge for our hotel company: Their upper-category properties are doing fine, but the budget chain just breaks even or, more often, loses money.

We could focus on a cost-cutting initiative for that group or perhaps look at exiting that segment altogether. Cost cuts in a service business often lead to a reduction in service for customers and therefore fewer customers staying at the hotel. Exiting the segment creates problems as well; customers who are part of the loyalty program get points and rewards for staying at any of the properties, including the budget line. If we do not offer properties in the budget segment, customers will stay with another chain when they need a lower-priced option or are in a location we no longer serve. The odds are if they are happy with their stay at the competing chain, they will stay with it more and with us less.

There must be a better way, thus creating the topic for our storyboarding exercise. Your task is to develop a new concept for a budget hotel chain. We put a short form of the problem or opportunity in the header card on your white board or easel, which we call the Opportunity Card. Following the Opportunity Card, we have our Focus Cards, which frame the opportunity and keep us focused on the challenge itself. In most cases, I let the group develop the Focus Cards based on industry experience, customer input, or resource expertise. In this case, I will set the Focus Cards. First, what does the customer want? What does the customer really value or need in a budget hotel chain? This also extrapolates into what the customer does not want or need. Second, how could technology support this new chain? What would technology enable or restrict in operating the facilities or managing the customer experience? Last, how would we build the place? What would the layout look like? How would we furnish it?

With this on the board, the participants get at it. Tell them you are looking for just a few words on each card, not a paragraph, picture, or long explanation. One to four words is best. Write big and clearly with the black Sharpies. When participants write a paragraph or long description of their idea, the writing needs to be smaller, and it becomes difficult for other team members to read. As Idea Cards are filled out, the neutral facilitator collects the cards, and once he or she has a decent number, starts taping them on the board. I like to have a number of one-inch sections of masking tape already torn off and lightly taped to the edge of the board. Push pins and a cork board work just fine as well.

Each Idea Card you collect gets assigned to one of the categories. This is not a foolproof process, so we do not worry too much if a card overlaps a couple of Focus categories or does not seem to fit any of them. You can add or change Focus Cards as necessary while working through the exercise. Tape the Idea Card up under one of the Focus Cards and read it aloud (translating any handwriting issues). As long as people can see the cards being mounted on the board, the Idea Cards will stimulate more ideas and more cards. Very

quickly, usually within 15 minutes, the process generates more ideas than you can manage, and you shut it down.

At this point, we rank and discuss some of the better ideas. Ranking is done with the green dots or markers (good idea: "Like it") or red dots (bad idea: "Don't like it"). Participants all approach the board with the collected Idea Cards mounted on it and each assigns three to five green dots and three to five red dots. After everyone has ranked the ideas, those with the most green dots are discussed further, and those with the most red dots are eliminated. You will still see some "group think" here, as people may vote for ideas that already have a number of green dots. In this case, the virtual version of storyboarding, done with computers, can eliminate the group think, as participants at a distance do not see which ideas are "liked" or "disliked" until totals are tallied.

Once ideas have been ranked, what happens next may be business dependent or related to the opportunity at hand. Often, the Idea Cards with the most green rankings can become Focus Cards for another pass through the process. The exercise can be repeated two or three times inside an hour or so, with the result being a collection of organized ideas leading to a process or a series of focused tasks. Names and resources are often assigned in the room as well.

Returning to our hotel example, under Customer Value, what do the customers really want in a budget hotel? Probably it is not five-star dining, spas, or a concierge service. At the end of the day, they want a good night's sleep in a safe and clean location. Idea Cards in this focus area that are on the mark may include:

- Good sleep
- Good beds
- Quiet rooms
- Convenient location
- Kid friendly
- Referrals to restaurants
- Loyalty program linked to the parent hotel chain

Under the Technology Focus Card, you may see:

- Online reservation
- Automated check-in
- Wi-Fi Internet access (even in the budget category now)

Under the Construction Focus Card, you may find:
- Low cost, but durable
- Sound insulation
- No pool, spa
- No restaurant
- Central location, near amenities

In reality, you would see dozens more ideas than these, but these are the relevant examples in our hotel case and normally score the most green dots. How do we give someone a good night's sleep? We provide a really good bed in a very quiet room. This seems contradictory in a budget hotel, so let us flip back to Lean. Lean focuses on value (what the customer really wants) and reduces or eliminates what the customer does not want or need. In this case, we will pay for the good beds and higher levels of sound insulation by reducing our spending in other areas. We will eliminate the pool, the restaurant, and the workout room. The lobby can be smaller but still very clean and well lit.

Storyboarding is itself a process, but at a macro level it is a process for developing and implementing a strategy. It yields a visual map of associated ideas that evolve into a plan and the foundation for implementing or acting on that plan.
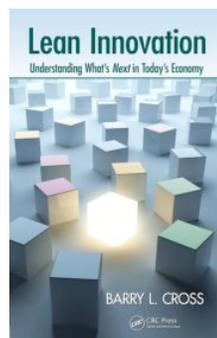
Excerpted from **Lean Innovation: Understanding What's Next in Today's Economy,** *by Barry L. Cross (CRC Press, 2013)*

This book can be purchased from the CRC Press website. Receive a 25 percent discount by using the promotional code "CROSS."

Canada's Premier Business School

Queen's School of Business is one of the world's premier business schools, with a faculty team renowned for its business experience and academic credentials. The School has earned international recognition for its innovative approaches to team-based and experiential learning. In addition to its highly acclaimed MBA programs, Queen's School of Business is also home to Canada's most prestigious undergraduate business program and several outstanding graduate programs. As well, the School is one of the world's largest and most respected providers of executive education.
Go to: http://business.queensu.ca

Professional Programs to Accelerate Careers

MBA PROGRAMS

Queen's MBA
This 12-month, full-time program develops exceptional leaders, valuable team members, and highly effective managers. Personalize the program around your strengths and aspirations.

Queen's Executive MBA
Designed for working managers and executives, this 16-month program is offered everywhere in Canada and at many international locations.

Cornell-Queen's Executive MBA
This program is a partnership between Queen's School of Business and Cornell University, one of the eight U.S. Ivy League schools.

Queen's Accelerated MBA for Business Graduates
A 12-month program for people with an undergraduate degree in business (or equivalent) and at least two years of relevant work experience. Earn a Queen's MBA while you work.

Go to: http://business.queensu.ca/mba_programs

GRADUATE PROGRAMS FOR PROFESSIONALS

Queen's Master of International Business
This program offers a global business curriculum and an international exchange, and features both single and double degree options.

Queen's Master of Finance (Toronto)
Earn a Master's degree in Finance in one year, while you continue to work. Developed in partnership with the CFA Institute.

Master of Management Analytics (Toronto)
Acquire the skills and knowledge to develop, direct, and deliver projects in analytics that add value to your organization.

Queen's Graduate Diploma in Accounting
The program consists of four accounting courses that meet the CA certification requirements.

Go to: http://business.queensu.ca/grad_studies

EXECUTIVE EDUCATION

Meet the competitive challenges of today's dynamic business environment. More than 10,000 managers from over 3,500 organizations in more than 60 countries have made us leaders in management education and development.

Go to: http://business.queensu.ca/executiveeducation/