

# GUIDE TO A SUCCESSFUL IDEATION SOFTWARE PILOT

—

## START MAKING INNOVATION HAPPEN



WRITTEN BY  
**v//ma**

## Guide to a Successful Ideation Software Pilot

We usually recommend our customers start with a pilot when they're either choosing or starting to use a new ideation software. A pilot should be much more than simply clicking around a piece of software and testing the features it claims to have.

The purpose of a pilot should always be as much about **testing your assumptions** and processes around the tool, as it is about testing the software. Your aim should be to pinpoint non-ideal or even problematic areas and to improve upon them based on the pilot.

This approach has a number of benefits for you, most prominently it:

- helps you form your ideation/innovation process, or to improve upon it, if you already have one
- provides you with concrete progress towards your goals
- allows you to see how the tool works in real life, which is crucial for preparing the rollout
- allows you to identify some of the unforeseen issues present in all plans

In order to help you succeed in your pilot, we've created a **simple checklist** for you to use as reference in planning it. You'll find that from this guide.

Please remember that **choosing the use case of your pilot is extremely crucial**. Start off with something simple and exciting which will capture the imagination of your participants, as well as progress your goals as an organization.

Ideally, the topic should be something that everyone is excited about and will have something to say about, and for which the ideas are quite easy to implement. Here are a few examples to spur your imagination:

- Concrete, easy-to-implement ideas for implementing the new company strategy and/or values
- Asking for the most annoying/boring/repetitive things in people's daily work
- Naming competitions
- The agenda and place of your next team off-site
- Improvement suggestions related to employee well-being

This guide will use Viima as the tool of choice, but the same steps apply regardless of the tool you choose.

In case you have questions, or something isn't clear, we're always happy to help! Please be in touch with your account manager at Viima or simply email us at [support@viima.com](mailto:support@viima.com).

**Best of luck with the pilot!**

# 1. Goals and targets

- The pilot will only succeed if you have a meaningful, concrete and relevant goal that you want to achieve by using Viima, so pay special attention to choosing a use case that is aligned with your goals.
- The next page contains a powerful print-out canvas you can use to design your pilot, make sure to fill that out and to use it during the campaign to make sure you're on the right track.

# 2. Technical preparations

- Sign up to the tool if you haven't yet at <https://app.viima.com/signup>
- Go through the "Getting started" guide in the tool. You can also view a brief demo of the tool [here](#).
- Remember to set up SSO login on your board using for instance Office 365 or Microsoft AD FS.
- Once you've set up a Viima board to match your goals and targets, invite 5 test users to log in and make sure they can do so without issues and that they understand what the pilot is about.

# 3. Launch and community management

- Remember to notify the participants in advance about the pilot (goals, motivation, schedule, instructions).
- You can invite the participants either by sharing them a link to the Viima board or by adding the users via Viima's admin portal and then sending them invitations from the tool.
- As users start to engage with the pilot, remember to keep the discussion active. Pull relevant people into the conversation of specific ideas by mentioning them with @Firstname Lastname
- Send out newsletters on how the pilot is progressing. Complement active users.

# 4. Wrapping it up

- Remind users when the pilot has one week left. If you have a competition going on, remind them about that as well.
- Analyze how the goals of the pilot were met and how Viima supported in achieving them. What were the parts of the pilot that worked well? Were there some challenges, bottlenecks, or other areas to improve?
- Plan for the future. Once you've analyzed the pilot and identified things you can improve upon, you should come up with a plan on executing those changes so that you're ready for a larger rollout. In case some of those changes would be related to the software itself, please let us know and we'll see what we can do to help you get firing on all cylinders!

## THEME

Write down which problem or opportunity you're looking to ideate around.

Ideally your theme should be well-aligned with your organization's strategic goals.



## AUDIENCE

Write down who you're looking to engage and via which channels.

Who are the most relevant people for this theme and who do you motivate them?



## GOALS

Set a (measurable) goal or goals around your chosen theme

Are they challenging but achievable? Do you have the resources to realize them?



## TIME

Is this a campaign or a continuous process? Write down your timeline + important dates.

When are you launching? How often do you make decisions on ideas? Arranging events?



## RESPONSIBILITIES

TASKS

Decision makers:

Innovation advocates:  
*(Facilitators/category admins)*

Organizing team:



## RESULTS & REFLECTION

Keep track of your results and make sure ideas are followed-up and implemented

Stop and reflect. How are things going? Where are the current bottlenecks?

