

The Orchid Model

How to Engage Individuals in Idea Management

By Mark Turrell

1. Introduction

The goal of Idea Management is to increase the innovation capacity of the firm, allowing the organization to handle more innovation activities that drive growth and process improvement. Idea Management achieves this by tapping into the creative potential of all employees to produce a pipeline of actionable concepts that yield business value. The process of Idea Management involves the collection of ideas from a diverse population, the development of those ideas into concepts through a collaborative process, and the selection of top concepts through an evaluation phase. The diverse population of contributors is typically made up of employees from various parts of the organization, some directly involved in a topic or project, and the rest only tangentially involved.



One of the critical success factors of Idea Management is to get an appropriate number of participants engaged in an initiative, and to ensure sufficient diversity within the pool of potential contributors in order to yield the desired quality of ideas and concepts.

There are several models of personality style that can help identify potential contributors to a program. However, unless these people are engaged, either actively or passively, their skills and experiences cannot be brought to bear on corporate challenges. Therefore the project team responsible for an Idea Management program needs to actively seek to engage people, and in so doing fulfill the overall objectives of the program.

The Orchid Model aims to identify the key roles involved in an Idea Management program from an engagement standpoint, and offers pointers as to how the model can be used to improve initial acceptance and ongoing participation.

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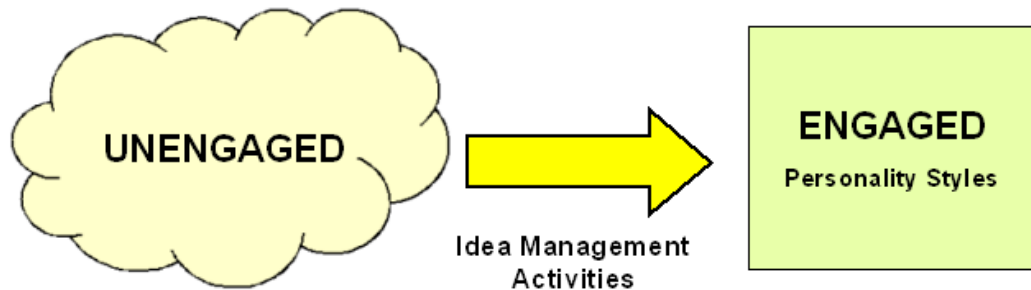
2. The Orchid Model

One of the most popular methods for supporting corporate objectives for innovation is Idea Management¹, the process of collecting focused business ideas from employees with the goal of extracting the top concepts for implementation or further development.

Often an Idea Management program is focused solely on idea capture and submission. However, studies at Imaginatik Research have found that the best concepts are not single ideas but collaborative builds of initial ideas that encompass diverse input from various individuals². Therefore it is important to consider several characteristics of the potential contributors in order to get the most from the program.

The Orchid Model is not built on personality styles and psychographics, but the actual interaction experienced within an innovation activity, particularly the use of an Idea Management system. The interactions are linked to the personality and styles of an individual, and the model can then be mapped on to these styles at a meta-layer.

The initiation for the model is the need to engage people in the innovation process. Whilst there has been a substantial body of academic work on personal innovation styles, individuals' styles are of little relevance to an organization if they are not engaged in some way to assist in the development of the innovation capacity of an organization.



The Orchid Model has been developed following four years of research into actual use of Idea Management programs with over thirty organizations around the world. The research has been conducted using data analysis from the use of Idea Management software³, supplemented with interviews with innovation managers and end users.

¹ "Corporate Creativity", Robinson & Stern, Berrett-Kohler Pub (1997)

² "Building Ideas Through Collaboration", Imaginatik Research, RN-1002-1 (Oct 2002)

³ Source: Imaginatik Research analysis of log data from Idea Central software, versions 1.0 through to 4.0 (1999 - 2003).

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The unique benefit of this research is that it is grounded in real activities, and provides practical guidelines for improving the success of Idea Management initiatives.

3. Orchid Types

The Orchid Model is a combination of personality styles, behavior through active engagement, and a model for engagement in specific Idea Management programs. The main roles within the model are:

- Observers** People not currently engaged in the program

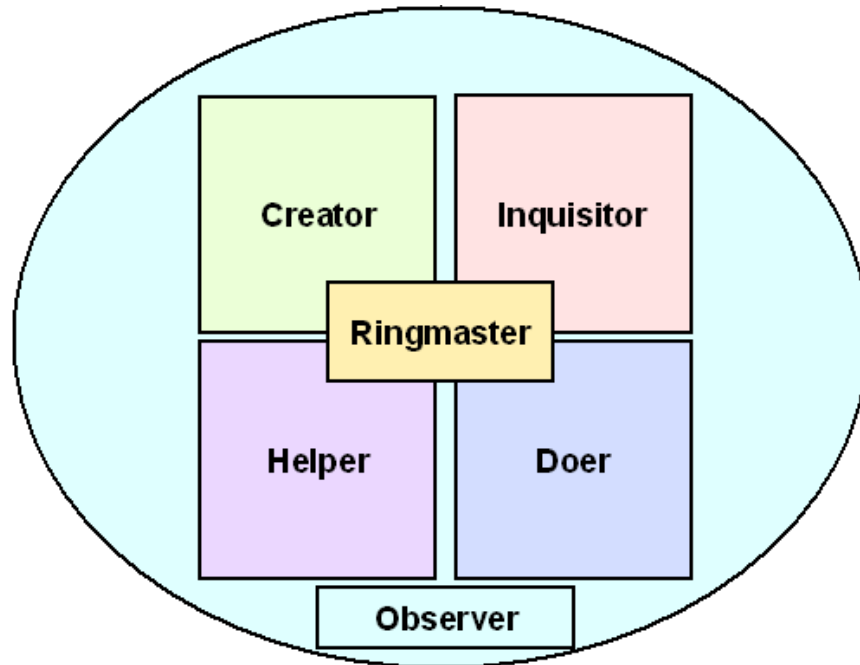
- Ringmasters** Leaders who initiate programs and stimulate engagement

- Creators** Individuals who like creating new concepts and solving problems

- Helpers** Individuals who like sharing experiences and making connections

- Inquisitors** Individuals who like sharing concerns and reservations

- Doers** Individuals who like executing concepts



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One concept that is critical to the successful use of the model is the appreciation that it is impossible to achieve 100% active participation in any innovation program. Participation will always be voluntary, as in many knowledge management projects, and it impossible to get everyone involved. Fortunately the overall business objectives can be achieved without complete participation.

3.1. Observer

Observers are individuals who are not currently involved in the Idea Management program. There are three types of Observer with varying motivation for non-engagement:

Unaware The Observer is not aware of the existence of the program, either because they have not been invited, or because they did not notice a request for participation.

Indifferent This Observer is aware of the existence of the program but has made a deliberate decision not to be actively engaged. This may be due to time constraints, lack of enthusiasm for the subject matter, lack of belief in their own ability to help, or simple indifference to the program in general. In many cases senior management are indifferent to the program, either because they are able to contribute in other ways outside of a formal system, or because they are focused on their own area of business.

Lurkers Lurkers are aware of the program's existence and are interested enough to investigate the system, looking at ideas without making their own contributions. These Observers bring benefits to the program in spite of their passive use. They may become aware of ideas and concepts that may be useful in their own work, and their passive engagement may mean that they are better aligned with organizational objectives.

3.2. Ringmaster

At the inception of an Idea Management project, the vast majority of people are Observers and it is up to the Ringmaster to initiate a program of engagement.

Ringmasters are assigned, either by management or personal request. They set the context for everyone else and provide strategic and tactical direction for innovation activities. Ringmasters tend to be in senior management and have some decision-making authority, either for a specific business area or for innovation in general. There may only

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be a single Ringmaster at the start of a project, but over time there will be many Ringmasters for the promotion of specific activities and events.

The Ringmaster frames the organizational challenges in such a way as to harness the creative capacity of individuals. They select the business challenges, they chose the methods for engaging people, and it is they who seek the authorization for action on the top concepts that will ultimately emerge from the Idea Management process.

It is impossible to get real engagement without the Ringmaster role. Moreover the individuals taking this role need to connect the generation of innovative concepts with the final implementation of the top concepts themselves. Similar innovation activities, such as brainstorm sessions, often suffer because the initiator of the project is unable to move concepts forward through to execution.

3.3. Creator

Creators like coming up with new and unique ideas. They tend to enjoy problem solving as a hobby, and are stimulated by tackling a diverse range of challenges. They are able to draw on a range of personal experiences, and in some cases they have learned tools to help them solve problems, such as Mind Mapping or brainstorming.

Often Creators are difficult to find as the culture of organization dissuades them from revealing themselves. It is strange that individuals can create fantastic works of art or design wonderful home improvement projects, and yet they appear satisfied with boring jobs at the office. The goal is to stimulate these people to make a contribution, and then offer them protection from potential negative consequences. For example, one Idea Management software package allows people to control whether their identity is associated with an idea, and in so doing builds trust in the process⁴. As a result people are more likely to contribute high value ideas and concepts.

3.4. Helper

Helpers like working primarily with other people's ideas. Whilst they may lack the capacity for the unique and original thought of the Creator, they have significant creative problem solving skills and prefer to improve existing ideas, turning them into meaningful concepts through their insight and knowledge.

A key motivator for Helpers is assisting other people. If they feel the need to criticize, they offer constructive comments. Helpers tend to advance ideas through their collaborative

⁴ Idea Central from Imaginatik

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efforts, which include bringing in other people to work on ideas. Often the Helpers lack the direct knowledge and insight to assist on an idea personally, but they like making connections between concepts, people and resources, and they form a critical role in growing the social net of the Idea Management program.

3.5. Inquisitor

The Inquisitors challenge ideas and concepts from other people, bringing value through the application of their analytical skills. Ideas are significantly improved through the insight of Inquisitors, although some individuals with this style struggle to be balanced and constructive.

People with this style derive personal satisfaction from being able to express their opinion and share their insight, and are often appreciative of the opportunity. Ideally they should be cautious in how they express themselves, as they may seem abrupt to the Creators and Helpers. Inquisitors are often known as critics and can be argumentative and opinionated. They are likely to question the wisdom of ideas, drawing on their personal experience, and their knowledge and wisdom.

It is possible to force an Inquisitor to become creative, and often these people are engaged through brainstorming sessions and creativity techniques to turn their sometimes destructive comments into constructive ideas. However, this tends to move these people outside their comfort zones, and is not a sustainable behavior over time.

Inquisitors are likely to spark creative problems solving in others. Their revelation of problems can generate high value ideas from the Creators and Helpers.

3.6. Doer

Doers prefer to be doing something with ideas. They lay the groundwork for implementation, and often make excellent members of an evaluation team through their attention to the practical matters that follow concept selection.

In terms of Idea Management, they do not normally like spending time looking at other people's ideas, and are comfortable in the world of the certain. The idea capture aspect can overwhelm them, as there are too many poor ideas for them to consider.

Individuals with the Doer style are sometimes project sponsors who are looking for the solution to a specific business problem. They appreciate the need for the overall process, and are often content to wait for the final output.

The Orchid Model**4. The Pattern of Engagement**

Initially everyone in the organization is considered to be an Observer. There can be no engagement without a program. Eventually a need for an Idea Management campaign is expressed and a Ringmaster takes the challenge of turning Observers into engaged participants. When people become engaged, their personal style takes over and the virtuous spiral⁵ of Idea Management can occur.

Stage 0 There is no recognized corporate need for a project, although there may be pent-up demand from Creators and Helpers to be involved in helping the organization meet its objectives. Senior level Doers also may have specific problems they would like to address. At this stage everyone is an Observer as there is no program to be engaged in.

Stage 1 The program is conceived by a Ringmaster through the explicit recognition of a corporate problem (e.g. "Need for Growth Opportunities") and through the energy of the individual who is willing to initiate a particular project. The Ringmaster will come from the Creator, Helper or Doer pool. The Ringmaster then creates the process and the channel for engagement, and embarks on activities to stimulate engagement.

Stage 2 At Stage 2, the goal of the Ringmaster is to convert the Observers into engaged participants. The onset of the project will attract the people most willing to participate in a creative program such as this, namely the Creators and the Helpers. However, most people remain in the Observer category until they are persuaded, through internal marketing and the reward system, to become active in the process. Over time there is a critical mass of engaged participants and that encourages the laggard Observers to get involved as well, even if they remain attentive lurkers.

Individuals can be stimulated to contribute through a good selection of business challenges that encourage input, and through the existence of other contributors who reduce people's fear of being first to contribute.

Stage 3 The goal of Stage 3 is to maintain the engagement of participants, particularly in stopping people from slipping back to the Observer role. It is possible for a previously engaged person to fall back into unengaged behavior. There may be many reasons for this, such as change in job circumstance, holidays, forgetting how to get into the system, and a

⁵ "A New Approach to Idea Management", Imaginatik Research WP-0801-1A (Aug 2001)

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paucity of interesting challenges where the individual feels they can add value.

It is possible for individuals to play more than one role within an overall program. For example, an individual may be a Helper in an area that is a personal passion, and an Inquisitor in an area that could negatively impact on their own work.

Companies can use various techniques to persuade people to shift from their natural role and into a more creative role. Brainstorming techniques, for example, can be used to gather ideas from all types of person, irrespective of their preferred tendency.

5. Typical Engagement Pattern within an Event

The typical engagement path of the roles within an Idea Management event is as follows:

1. The Ringmaster orchestrates the overall direction and timeline for the business event. They commence the internal marketing necessary to attract individuals to the program.
2. Creators usually provide the initial spark for ideas. Other roles, particularly Helpers, may have existing ideas and concepts they are prepared to share. This effect is stimulated through first-hand experience of using the system, and is reinforced through viewing other people's usage. We have found that individuals often are persuaded to make contributions for fear of missing out on their chance to submit an idea.
3. Helpers also provide a spark for other people, out of their desire to help. The ideas generated may not be very novel, but their interaction assists the attainment of critical mass of participation and collaborative input.
4. Within days, the Inquisitors begin to get involved. They need content to work with as they are usually not original thinkers, and the existence of good input from Helpers and Creators mean their work can begin with relish. It is also useful if the Helpers have initiated some collaborative building, as it makes the Inquisitor interaction less threatening to specific ideas and authors.
5. When Inquisitors interact, they pose questions and problems that can be addressed by Creators and Helpers. In a positive environment, the interactions help build higher quality concepts, although overtly personal remarks can dissuade people from contributing, and turn all roles into unengaged Observers.

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6. Doers are effectively Observers for most of the engagement, as they prefer to wait for the ideas to be finalized. If they are intrigued by the challenge or the specific contents of an idea, they can be persuaded to provide insight and experience in the same way as a Helper or Inquisitor. However, they come into their element when the concepts are ready for evaluation, selection and ultimately assignment as a project. Doers tend to favor implementation over creativity, so their role is critical to the overall success of the engagement.

7. When the event nears conclusion, the Ringmaster pulls together the top concepts and ensures that the handover to implementation takes place. The Ringmaster then communicates the outcome to participants, reinforcing the message that their engagement was useful and welcome.

6. The Orchid Model and Other Indicators

There is a wealth of research into personal work styles and attitudes. The thesis of most established models, such as the C.A.R.E., the KAI, the HBDI or the VIEW⁶ is that people have their preferred styles of thinking, working, and problem solving. Most argue that style issues are individual orientations, and therefore not choices to be made by individuals.

In a corporate environment, the involvement in an innovation program is a personal choice, and the direction and sponsorship of innovation activities needs to come from high level management. The Orchid Model is designed to provide a framework for the corporate innovator to design an engagement program and, once people are engaged, to encourage active participation which in turn is driven primarily by personal thinking styles and attitudes.

The Orchid Model differs from other models in the concept of 'engagement'. Engagement needs to occur before personality styles can have an impact on the outcome. The key difference therefore is the role of the Observer, and the role of the Ringmaster in encouraging Observers to become active in the system. Once an individual has decided to become active, personal styles take over.

The principle of personalities and preferred styles is included within the model (the 'CHID' part of the Orchid), and indeed these traits can be mapped onto many other existing models.

⁶ VIEW is developed by Scott Isaksen and purports to measure one's style as it relates to creative problem solving.

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6.1. Orchid as the Meta-Layer

There are many different methods of assessing personality, of which some have been rigorously validated. There is no one right answer and each method has its own advantages and disadvantages.

In a corporate context it is not feasible to test everyone on all methods. There is usually one preferred method (if used at all) and this method is administered to a select group within the company. The methods are useful for working out teams and understanding how to interact with different people.

From a corporate innovator's perspective, the individual is too low a level of detail, even though an implementation will depend on the goodwill and participation of many people. Therefore these methods provide a source of understanding, but are not necessarily a guiding tool. Furthermore there may be legal, ethical and privacy concerns that restrict the use of the tool in policy making decisions, and thus the value of the tool primarily lies in helping people understand themselves and their co-workers, rather than as a method of implementing programs.

The Orchid Model covers the engagement and leadership aspects of innovation, and can be mapped onto an organization's preferred evaluation tool as required.

Most models accept that people can behave outside of their personality style. The KAI methodology introduces the concept of Coping Distance. Individuals can adopt a behavior that falls outside their normal profile, but this shift in behavior takes an amount of effort equal to the 'distance' between the new behavior and their preferred style, and the amount of time they need to sustain the behavior. In this way, individuals can brainstorm creative solutions for a short period - with the help of expert facilitation – even if they lack the 'creative gene' to make them comfortable.

6.2. Mapping Orchid onto the Team Dimensions Profile (C.A.R.E.)

The Team Dimensions Profile⁷, formerly known as the C.A.R.E. Profile, is very close to the Orchid Model:

Team Dimensions Profile

Orchid Model

Creator

Creator

⁷ The C.A.R.E Profile and the *Innovate with C.A.R.E.® Profile* were developed by Allen N. Fahden and Srinivasan Namakkal. For more information, visit <http://www.discprofile.com/research/RSCare.pdf>.

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Advancer	Helper
Refiner	Inquisitor
Executor	Doer
Flexor / Facilitator	~ Ringmaster

The Team focus of this method means that the Flexor role is not as significant as the Ringmaster role, but there are similar attributes and behaviors.

6.3. Mapping Orchid onto the KAI

The Kirton Adaption Innovation Inventory (KAI)⁸ assesses an individual’s problem solving style and it does not correlate with level measures associated with the Orchid Model. The theory makes a distinction between the level or capacity of an individual for solving problems (how good they are) and his or her style (how they prefer to do it). The former is addressed by asking questions such as: ‘How well?’ ‘How much?’ or ‘How good?’, whereas the latter can be addressed by the question: ‘In what way?’.

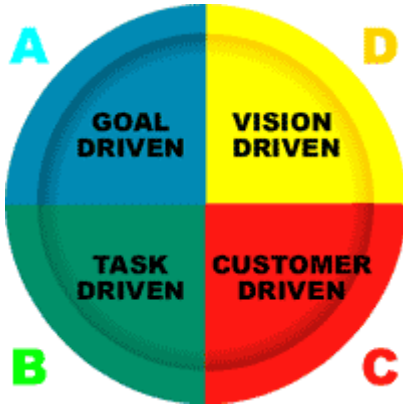
The correlation of the Orchid Model with the KAI is therefore harder to establish. In general, a Creator is ‘More Innovative’ and the Doer is ‘More Adaptive’.

There is also the role of the ‘Bridger’ in the KAI language, although the Bridger designation is not really a style, but an assignment of a function. Bridgers are said to lie in the median range between the extreme scorers in any one KAI group. They act as the ‘cement’ of a group, helping the extremes understand and appreciate each other. Bridgers usually make good supervisors or managers. It is likely that a successful Ringmaster would have a bridging style.

⁸ Selected references: KIRTON, M. J. (1976). Adaptors and Innovators: A description and a measure. *Journal of Applied Psychology*, Vol. 61, 622-629. KIRTON, M. J. (1984). Adaptors and Innovators - Why New Initiatives Get Blocked. *Long Range Planning*, Vol. 17, 137-143. KIRTON, M. J. (1994). Adaptors and innovators - styles of creativity and problem solving. London: Routledge. For more information, visit <http://www.kaicentre.com>.

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6.4. Mapping Orchid onto the Herrmann Brain Dominance Indicator (HBDI)



The comparison with between the HBDI⁹ and the Orchid Model is not very concrete. The HBDI, based on Hermann’s examination of the psychology and physiology of the brain, is based on a four-sided model of thinking styles that are metaphorically attributed to four regions of the brain. These four quadrants (A, B, C, D) may be characterized as: A - logical (Blue), B - organized (Green), C - interpersonal (Red), and D - imaginative (Yellow). Creativity, Hermann discovered, is a process involving all four quadrants.

In the Orchid Model, the Ringmaster might be compared to a 'whole brain' with equal strengths in all four quadrants. In terms of the colors of the HBDI, the Creator would be Yellow, and the Doer would be a mix of Green and Blue, the Helper would be more Red, and the Inquisitor a mix of Blue and Green.

7. Implications for Idea Management Initiatives

The Orchid Model adds an organizational and people context to the implementation of Idea Management. There are a number of considerations that may impact the approach taken by the project sponsor:

- Acknowledge that individuals have different predispositions. Do not expect that each individual has the desire or the capacity to make the same range of contributions.
- Appreciate that there is a limit to how many people will be engaged in certain events, and that the aim should be to entice the appropriate volume of people to generate the required diversity of ideas and concepts.
- Use a flexible computer software and a process that provides useful and usable collaboration features. Educate people as to the possibilities of the approach, without overwhelming them, and use key opinion leaders to demonstrate good practice. This encourages Observers to become active in a manner that suits them.
- Stimulate events by providing seed ideas as examples of good practice. This helps to convince Observers that they are not alone and make it more likely that they will contribute.

⁹ For more information or to take the HBDI instrument, look at <http://hbdi.com/>.

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- Harness the benefits of the event-based approach to Idea Management as it increases the likelihood that individuals can be persuaded to participate in programs. The selection of events, the framing of topics, the selection and promotion of rewards, and the means of communicating programs are all going to help.
- Build an understanding of these behavior patterns into the choice of business challenge, as well as the marketing messages used to stimulate participation before and during the event. For example, launch e-mails should explicitly encourage looking at and building on existing ideas.
- Take individual predispositions into account when assigning roles and tasks for events. For example, Creators may be good to pre-populate an event with seed ideas, but Doers and Inquisitors make better evaluators.
- Align the reward mechanism with the types of behavior that are most relevant for your innovation goals. For example, complex problems require a few well thought through solutions, usually the result of collaborative builds. In this case, a reward program that overly compensates new ideas would be inappropriate.
- Promote the use of advanced collaboration techniques to tap into the social network of individuals through features such as ‘Tell a Friend’ or ‘Send a Link’. In this case an individual may not have been motivated originally to participate in an event, but a personal e-mail from a trusted colleague requesting their expert input may be enough to persuade an Observer to make a substantive contribution.
- Consider a range of options for internal marketing and promotion to turn Observers into active participants, and to encourage ongoing engagement in the process. Use personal invitations from senior sponsors to get input early in an event, and towards the end of an event.
- Construct mass e-mail messages that contain ‘hooks’ for different people, offering everyone a little of what they need to get them to interact. Also the rewards form a generic motivator to encourage people to move from an Observer role to another more active role.
- Target key personality groups to maintain high quality input and set an example. For example, some companies target a select group of Creators and Helpers to kick start events. Dow Chemical has a group called the “Explorers”, and at Grace

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Performance Chemicals they are affectionately called the “Crazies”. These individuals bring creativity and problem solving skills to any topic.

8. The Benefits of the Orchid Model

The Orchid Model offers a number of benefits to organizations that chose to take a systematic approach to employee participation in Idea Management initiatives. They will keep the following points in mind:

- Focus on the initial goal of getting people engaged in the process.
- There are distinct types of people and they should be treated differently. A program needs all types for personality to be truly successful, and benefits come when the skills and styles are blended together.
- Manage the expectations and feelings of everyone to maximize the outcome and the long-term sustainability of innovation activities.
- There is a need for a diversity of contributors to increase the likelihood of yielding high quality concepts.
- Importance of the Ringmaster in making things happen.
- Importance of Doers for moving specific ideas and projects forward.
- Alignment with business objectives through the Ringmaster.
- Increased knowledge sharing between individuals on the specific topic.
- Increased social contact through knowledge sharing and the socialization process.
- Awareness that a community of interested people exists for specific topics.

Successful use of the Orchid Model should significantly improve the success of all innovation activities, leading ultimately to increased innovation capacity and tangible wins from particular projects and ideas.

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9. Potential for Wider Application of the Orchid Model

The Orchid Model has been developed from the use of Idea Management programs, as they are the most tangible form of successful innovation initiative. We believe the model can also be applied to other types of Innovation Activity, and the advice can help make all activities more successful.

There may be applications for the method for similar types of Knowledge Management application, for example, such as Communities of Practice and Expert Networks. These programs share the same form of dynamic knowledge approach as Idea Management¹⁰.

10. Conclusion

The Orchid Model illustrates the need for companies to distinguish between engaged and non-engaged employees, and highlights the importance of the Ringmaster to initiate projects and stimulate activity. Engaged participants exhibit different personality styles through their activity, and these personal styles combine together to generate high quality concepts that are conceived through creativity and collaboration.

There are many existing models to determine personality styles, and the Orchid Model does not attempt to replace them in any way. Instead it can be used as a meta-layer, allowing companies to select an approach that is suitable for their needs.

Finally, the Orchid Model provides a framework for understanding the motivations of different individuals, and offers guidance to improve the adoption rate of Idea Management programs and potentially other forms of collaborative activity.

11. Contact Details

For more information on Idea Management, and other research from Imaginatik, please visit www.imaginatik.com/research or contact:

E-Mail: research@imaginatik.com

US Office: +1 866 917 2975

European Office: +44 207 917 2975

¹⁰ "Dynamic Knowledge Systems" Pluskowski, B., Knowledge Management, Vol. 5 Issue 8, May 2002