



The Category Map Tool

Highlight the Commercial Opportunity

Step 1: Map the current market space showing the categories of solutions that exist.

Step 2: Use a dotted line to highlight the opportunity for your idea in this landscape.

Title: _____

The Segment Strawman Tool

Create a Use-Case Scenario

Step 1: Profile your target customer using "Descriptors".

Step 2: Describe how they will use your solution and "Compatibility".

NAME YOUR SEGMENT: _____

DEIVERS: _____

COMPATIBILITY: _____

DESCRIPTORS: _____

The Go-To-Market Tool

Map Your Go-to-Market Plan

Step 1: List the potential lead customers.

Step 2: Label the target segments.

Step 3: Summarize the major initiatives, success measures, timing, and risks for each phase.

Lead Customers (with address):

1.	_____
2.	_____
3.	_____
4.	_____
5.	_____

Target Segments: #1 _____ #2 _____ #3 _____

Category Leadership: _____

The Market Fishbone Tool

Explore the Commercial Possibilities

Step 1: Label the tail fin with 2-3 unique attributes of your science or technology innovation. Use these to guide your brainstorming.

Unique Attributes of Your Idea:

1. _____
2. _____
3. _____

Step 2: Brainstorm the potential uses and applications for your core science or technology. Explore broad fields of use first (markets), followed by the sub-sectors (segments).

Certified Coach PLAYBOOK



SECTION 1

Orientation

Becoming a WKI Certified Coach empowers you to guide early-stage science/technology innovators and entrepreneurs to use the WKI System to articulate the business value of their innovations and ideas. This section reviews the qualities, talents, roles and responsibilities of a WKI Certified Coach.





WKI Certification Program

Welcome!

Becoming certified in the WKI methodology and frameworks is an exciting step that can lead you to new innovations and successes in your organization. It can also help you to advance and show leadership in your organization. As a WKI Certified Coach, you will become part of an elite group of accredited coaches to receive ongoing professional development, support, and resources from wendykennedy.com.

WKI is a proven methodology to help innovators discover the business value proposition of science and technology innovations. As a Certified Coach, you will acquire the knowledge and skills to guide innovators to discover the business value inside their ideas.

WKI Certification Program Goals

- 1** Provide coaches with the foundation knowledge and skills to deploy the tools and approaches of the WKI methodology.
- 2** Equip coaches with tools and approaches to deploy the WKI system and materials with early stage science/technology researchers, scientists and technology innovators.
- 3** Build understanding of the steps and elements to execute successful ideation programs based on the WKI methodology and coach approach.
- 4** Foster a community of best practice advice and insights to stimulate ongoing development of WKI Certified Coaches.

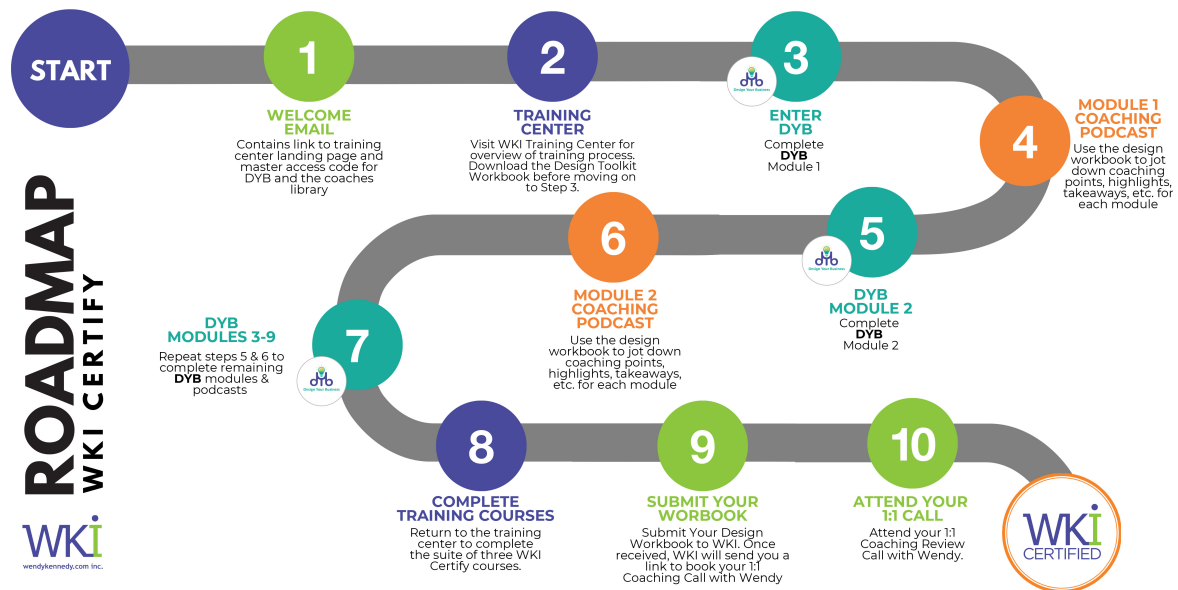


The WKI Certification Training Program

The flowchart below outlines the training journey you are about to embark on. To begin, you should download the training resources shown on the following page. You will find these in the online training center. You will need these resources to work through the training.

You will see this flowchart appear throughout your training as your guide through the certification process.

Overview of the Certification Training Process



Training Resource Materials

The WKI Methodology

WKI is an internationally recognized entrepreneurship methodology in use by leading incubators, accelerators, universities, commercialization offices, government labs, research institutes and others. It is designed to help science and technology innovators and their organizations discover the business value of early-stage ideas, project concepts, and innovations.

The uniqueness of the methodology lies in the proprietary visual design frameworks and models designed around nine (9) key questions that go in to defining the commercial value of a new idea.

Your role as a WKI Certified Coach is to guide innovators to effectively discover the answers to these questions using the tools and templates in the WKI methodology.

The WKI Design Your Business Methodology

Welcome to WKI's Design Your Business
Where innovators come to design the business value of their ideas.

Design Your Business Value
Below are nine modules, each addressing a specific piece of the business value puzzle. Each module includes a visual framework, coaching videos, tool tutorials, illustrative examples, and templates to help you design a compelling value proposition for your idea.
We suggest you walk through the modules in sequence, taking time to explore, model and map the business value of your idea. Be prepared to be inspired! Here we go!

1 WHAT'S YOUR IDEA?
2 WHAT'S THE PROBLEM?
3 WHERE DOES YOUR IDEA FIT?
4 WHO'S THE POTENTIAL CUSTOMER?
5 WHAT'S YOUR PATH TO MARKET?
6 WHERE'S THE MONEY?
7 WHAT'S YOUR COMPETITIVE EDGE?
8 CAN YOU EXECUTE?
9 WHAT'S YOUR STORY?

A rich suite of training and resource materials are available to support you, including:

1. WKI Design Your Business

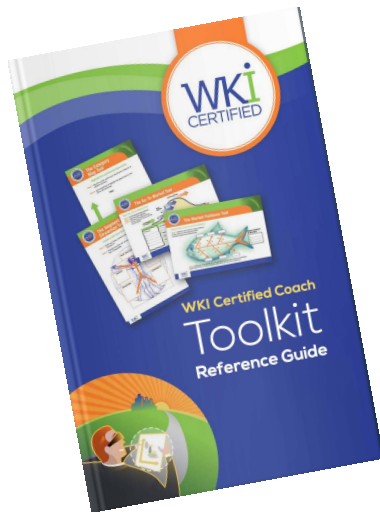
WKI's Design Your Business is our online SaaS platform that expands the richness of the methodology to include personal tutorials, video coaching, templates and support resources. You can purchase seat packages for use by your client innovators.

Details here: <https://wendykennedy.com/dyb>



Welcome to WKI's Design Your Business

Where innovators come to design the business value of their ideas.



2. Certified Coach Toolkit Guide

Bring the WKI Certified Coach Reference Guide with you when you are on the move, using the tools to work with your client innovators and entrepreneurs.

The guide offers step-by-step coaching guidelines for each of the WKI design frameworks in the methodology to give you a game plan for each meeting.

3. WKI Certified Coach Playbook

This playbook is designed to be your primary program planning guide.

It contains detailed step-by-step instructions to create programs based upon the WKI methodology.



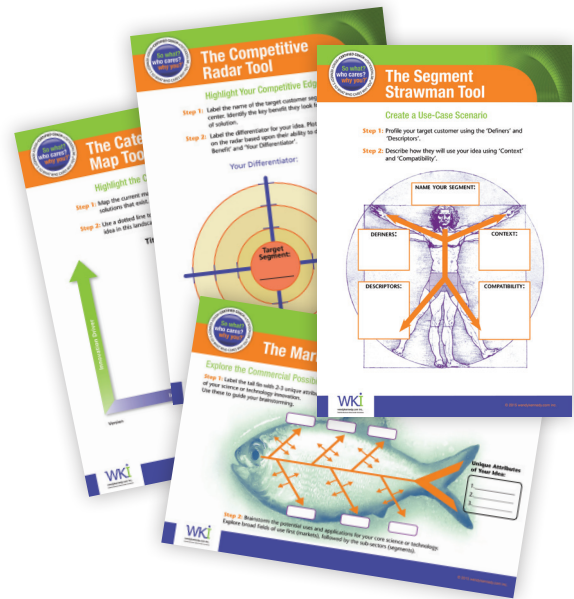
4. Coaches Resource Library

Certified Coaches are provided with a private, personalized code to access additional support resources online. Inside the resource center you'll find video coaching, checklists, program tips and more to ensure your success as a WKI Certified Coach.



5. Dry Erase Boards

A selection of design tools from the WKI methodology are also available as dry erase wall posters. Mounting these in your ideation room is a fantastic way to focus conversations and brainstorming sessions around business value. A suite of five WKI design tools are available as four-color posters, laminated for use with dry-erase markers and are a core component of the WKI Ideation program.



6. Design Toolkit

All worksheets in the WKI methodology are also available as a digital workbook. Founders use the workbook to draft and design the business value of their ideas. This workbook is available inside WKI's Digital Platform, "Design Your Business" described below.

This design workbook will also be used by you throughout your training to capture key points, highlights, and coaching ideas as you work through the training modules.



WKI Core Principles

- 1** Science & Technology Innovations and Ideas
- 2** A Structured Methodology
- 3** Disruptive, Novel and Game Changing Ideas
– "On the Napkin"
- 4** Idea Founders = Researchers, Scientists,
- 5** Engineers...Ideation to Commercialization
- 6** Coaching Sessions versus Training Classes
- 7** Find the Business Value Inside Innovations
- 8** It's about Entrepreneurial Thinking, not just
Entrepreneurship
- 9** A Program Focus
- 10** WKI Coach Approach

The WKI Methodology is designed to be used in the following contexts:

1

Team Oriented

Work with the frameworks is best done in a group setting with two or three people on a team. Encourage multiple people with an idea to get involved.

2

Discuss & Debate

The frameworks must be used to stimulate open discussion and debate. They are designed to invoke discussion, so all exercises should drive toward this goal. Use the frameworks to get people sharing their perspectives, debating directions, challenging each other's assumptions, and so on.

3

Explore and Experiment

The frameworks are designed to explore, discover and experiment with different avenues, and to brainstorm as well. They are not designed to produce a single "right" answer. Encourage people to explore many options.

4

Modular

Coaches should be conscious to use the frameworks in the manner and structure that can work best for the situation. For example, when working one on one with a participant, you can make certain frameworks a requirement to fill particular gaps. In larger groups, a more structured and sequenced approach will be required.

5

Visual and Engaging

The goal is to stimulate the business thinking and not to have the participants become overwhelmed by the task of documenting their business rationale. For this reason, the frameworks are designed to be used in a visual and interactive way.

6

Draw and Display

Rather than having individuals work on exercises in their own notebooks, have them work on flip charts and dry-erase boards. This ensures that the frameworks become interactive and that many people can participate in the development of the exercises.

7

Real-World and Hands-On

The frameworks – and in fact the entire WKI Methodology – are designed to create a real-world, hands-on learning environment for participants. To maintain this, use real-world examples, personal experiences, and hands-on working models that can be populated with the participant's own data.

8

Alignment

While the frameworks are meant to foster exploratory thinking, they should also provide a means for alignment between participants. As technical/scientific teams explore, discuss, and debate potential routes for commercialization, the tools should help provide clarity among and between team members.

9

Challenge Assumptions

The frameworks should promote the challenging of assumptions – one's own as well as each other's – rather than simply documenting the status quo. Use the tools to encourage teams to explore options in an open environment and to consider alternative value points beyond the one(s) originally conceived.

10

Outcome Driven

Each framework should generate a specific outcome that contributes to the business-value discovery process. It is an iterative rather than a cumulative approach. The tools are modular, meaning that each is focused on addressing a particular gap in knowledge or outcome. This helps the business or technology transfer professional to isolate key points required to complete the business value puzzle and select or assign a specific tool to the inventor to use to provide this.

As a WKI Certified Coach, we encourage you to model the 10 attributes above in your 1:1 coaching sessions and ideation programs.

A Platform to find the Business Value Inside Innovation

WKI Certified Coaches can launch unique and high value coaching programs in their organizations:

Use Case	Value
Academic Innovators	<ul style="list-style-type: none"> • Guide scientists and researchers to translate their ideas into commercial value propositions • Prepare scientists, researchers and engineers for conversations with industry, business partners and investors • Renew relationships with scientists, researchers & engineers • Increase commercial activity and disclosures • Give these innovators a self guided toolkit to build their skills in preparation for funding proposals, etc.
Entrepreneurship	<ul style="list-style-type: none"> • Prepare founders to articulate the commercial opportunity to investors, customers, partners and others • Launch new coaching programs research commercialization, startup formation, and corporate innovation • Provide high-value, hands-on coaching using real-world entrepreneurship tools • Engage local business communities, campus faculty and technology transfer officers using a common process and vocabulary
Economic Development	<ul style="list-style-type: none"> • Support start-up activity through effective hands-on coaching and real-world entrepreneurship tools • Engage local business communities, campuses and tech entrepreneurs using a common process and vocabulary • Attract grant funding and government support for economic development programs centered on technology entrepreneurship

Qualities of a Successful WKI Certified Coach

The most successful WKI Certified Coaches share particular qualities and characteristics. The most important of these include:

- 1 Entrepreneurial Instincts**

The best Certified Coaches understand the risk and commitment that is required to be an entrepreneur, or to offer up an idea for commercial scrutiny. They are compassionate towards those with entrepreneurial spirits and have a sincere desire to help them succeed.
- 2 Share an Informed Point of View**

While compassion is a key quality, a successful Certified Coach must also be willing to push users to challenge the commercial applications and viability of their ideas, and to challenge their assumptions. The best coaches do not waffle – when asked a direct question they give a direct answer.
- 3 Current Knowledge**

Effective coaches read avidly and keep up to date on technology and business news. They bring this knowledge and these points of view to their events and programs, toolsets and examples.
- 4 Direct and Dynamic**

WKI Certified Coaches are clear and succinct. They are able to clearly communicate concepts and ideas in a concise way, leaving ample time for dynamic interaction, group work, and hands-on activities. They are effective at facilitating discussion and debate, and at guiding participants to concrete outcomes.
- 5 Dynamic & Committed**

The best Certified Coaches are committed to the process and its goals. They are also committed to ensuring that their participants remain fully engaged. When energy wanes or frustrations rise, the effective coach will find a way to re-energize the group to complete the task at hand and feel a sense of accomplishment to move on.

Coaching Standards

As a WKI Certified Coach, you are pledging to recognize, support and uphold the following standards of delivery:

- 1 Premium Tools**

The WKI concepts and methodology will always be illustrated and reinforced using topical, leading edge examples and tool sets. The tools will draw from current, real-world examples and case studies, and will be prepared and presented in a professional format which may include professional graphic design and printing.
- 2 Professional Delivery**

Every WKI Certified coaching program will be delivered with premium quality and the WKI brand will always be represented in the highest standard. This means that the coaching sessions and clinics will always be thoroughly organized, well planned, and presented in professional settings.
- 3 Practical & Real-World**

The WKI design tools and concepts should not be presented as theoretical or academic exercises. Certified Coaches must bring a rich base of current entrepreneurial examples and stories to their coaching programs. They should always add talking points and illustrative examples that are reflective of current events and emerging technology sectors.
- 4 Energy and Intensity**

One of the greatest benefits the WKI methodology provides to scientists, inventors and entrepreneurs is a structured way to discuss and present their ideas and value propositions. Through dialogue and peer-directed challenges they can develop crisp and concrete language to articulate the business value of their ideas. WKI Certified Coaches should aim for an energetic pace and healthy tension when guiding clients through the tools in the WKI methodology.
- 5 Outcome Driven**

As a practical system, the WKI methodology must result in concrete outcomes that participants can use in the real world and take action on immediately. As a Certified Coach, you must help – sometimes even push – users to make decisions in a timely manner. Never end an ideation session – or a 1:1 meeting without closure. Focus on a specific task and guide users to complete it.

6

Enthusiastic Tough Love

In addition to injecting each meeting with energy and enthusiasm, a WKI Certified Coach will also need to be prepared to give “tough love” as required. You should have a point of view and be concrete. Don’t rely on responses like “it depends” – always drive toward concrete outcomes, even when that means challenging participants or disagreeing with their assumptions.

7

Entrepreneurial Thinking

WKI is not strictly about entrepreneurship. It’s about entrepreneurial thinking. While it is powerful for coaching entrepreneurs, it is equally powerful in its ability to reach into science and technical communities. Scientists and inventors may not want to start companies, but they may want to have their ideas recognized commercially. The goal is not to turn these researchers into business people. Rather, the goal is to enable such people to understand and articulate the commercial aspects of their inventions.

Certified Coach Roles & Responsibilities

Each WKI Certified Coach accepts the following responsibilities of certification:

- To follow the WKI Certified standards of delivery
- To strive to be current in industry developments related to innovation, science and technology and present entrepreneurial examples related to these developments
- To protect the integrity of the WKI methodology, copyrights, brands and trademarks
- To aid innovators and entrepreneurs to apply the WKI methodology to their ideas through a coaching approach vs. in a consulting role.

SECTION 2

The WKI Methodology

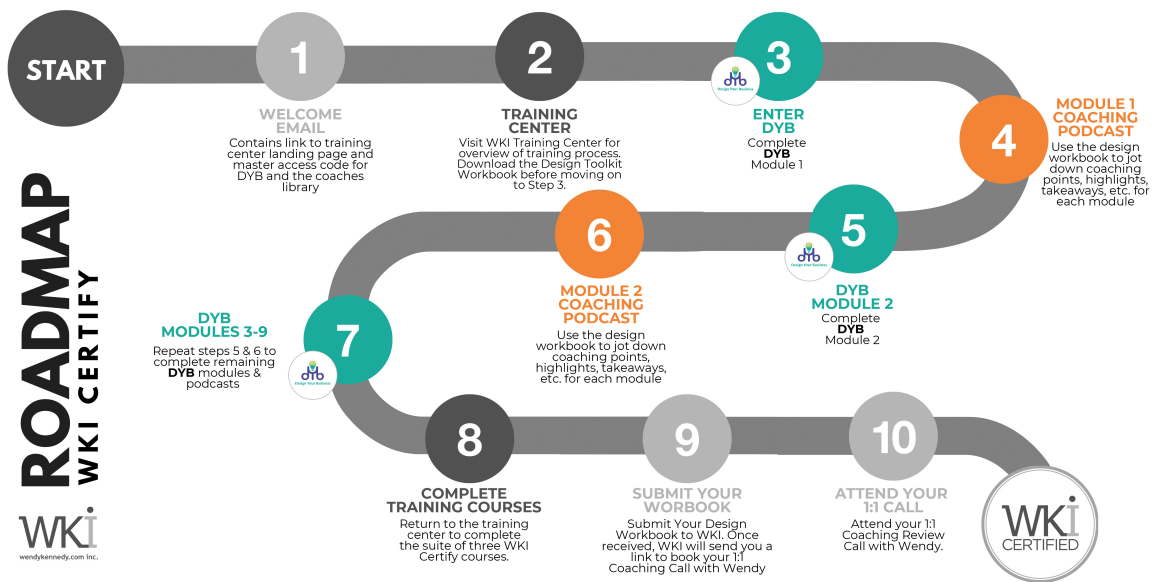
Guiding discussions using the frameworks in the WKI methodology is a cornerstone to your success as a WKI Certified Coach. Our toolkit reference guide for coaches is a standalone Ebook to support you every step of the way.





WKI Methodology & Frameworks

You Are Here...





WKI Methodology & Frameworks

Introduction

In this section, you will gain insights and knowledge on each of the frameworks that make up the WKI methodology. You will be using WKI's Design Your Business online platform (<https://dyb.wendykennedy.com>) to complete this training. Please use your access code assigned to you to log into Design Your Business.

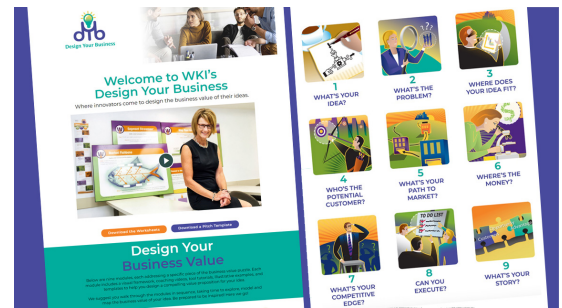
Also, don't forget to download the "Design Toolkit" from the training center. Use this toolkit to capture your coaching tips, tool insights, and other key takeaways for each module.

Working through each module, you will learn:

- The key principles and approach of the methodology
- The purpose and key elements of each tool
- Proven coaching techniques to use each tool most effectively
- The WKI Coach Approach to use each tool

Once you complete a module, please return to the WKI training center to listen to the accompanying coaching podcast for that module. You can find these on the training center page under the heading, Coaching Podcasts.

The Certified Coach Toolkit Reference Guide makes a great reference tool to follow along as you complete each module in Design Your Business. It is available in the training center.



The WKI methodology has these characteristics:

1

Practical

Hands-on working models that can be populated with the inventor's own data are essential. The frameworks should not be theoretical models. Templates that can be completed with input from the inventor and research team are most effective.

2

Modular and Self-Directed

First drafts of the WKI frameworks should be easy to complete with minimal support required. While collaboration is encouraged, the goal is to have the inventor or entrepreneur undertake this discovery process early in the idea generation process. Modular, self-directed tools also allow the scientist or researcher to explore options for commercialization in advance of coaching by you.

3

Visual and Engaging

The ideal frameworks are visual and engaging and ask the researcher to map out the business thinking using diagrams, frameworks, and models. The use of familiar templates such as flowcharts, matrices, and decision trees, applied to the business context help to engage the innovator in the process. The goal is to stimulate entrepreneurial thinking, not to have the inventor overwhelmed by the task of building a business plan.

4

Team Oriented

The best frameworks engage the people to collaboratively discuss and debate potential solutions to the business value. Tools that are visual and engaging in a team setting allows enables collaborative discussion using a common approach.

5

Exploratory

The frameworks should promote challenging of assumptions rather than simply documenting the status quo. They should encourage the team to explore options in an open environment and to consider alternative points of view beyond the one(s) originally conceived.

6

Alignment

While the goal is to foster exploratory thinking, tools and approaches should also provide a means for alignment. As teams explore, discuss, and debate potential routes for commercialization, the tools should help provide clarity among team members.

WKI Coach Approach

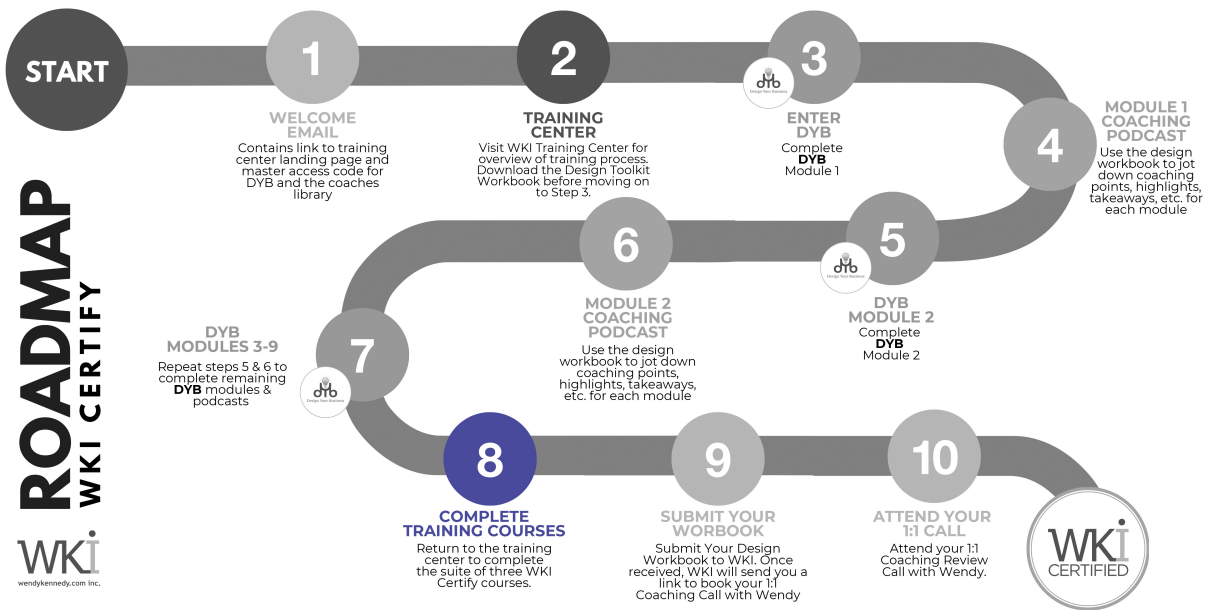
The WKI Certified Coach Program prepares you to coach and guide early-stage science/technology inventors, researchers and entrepreneurs to use the WKI methodology and tools to design the business value proposition for their ideas.





The WKI Coach Approach

You Are Here...





The WKI Coach Approach

Engaging Innovators through Coaching

In the previous section, you were introduced to the key principles, philosophy and frameworks that underlie the WKI methodology. You also learned how to use the WKI tools to help clients design and shape the business value of their ideas using those tools.

In this section, you will learn how to become an effective coach and tailor your program and coaching style to different client needs.

It's important to recognize that the WKI methodology is a platform that can be used in different ways for ideation, ideation, and commercialization. Different stakeholders in your ecosystem will have varying needs that can be addressed by you as a WKI Certified Coach. In this section, we explore several of these and how your status as a WKI Certified Coach can add value to you and your ecosystem.

Tailor Coaching to Different Audiences

Within your community, you may want or need to reach stakeholders such as:

- Entrepreneurs with innovative ideas
- Researchers, scientists and engineers exploring paths to commercialization
- Small and mid-size businesses exploring new product ideas
- Product teams with new ideas
- Commercialization officers
- Economic development professionals supporting commercial activities
- Incubator managers advising entrepreneurs
- Investors assessing new opportunities

Coaching Entrepreneurs

Crystallize the business value proposition the science or technology concept represents. Entrepreneurs need to focus on pitching their ideas to engage investors, customers, early partners, and advisors. They'll have to get the story "nailed down" into the key points and that's what WKI can do for them.

- They need to be clear and concise in "presenting their story" and speak the language of business.
- Your goal as a coach is to structure the process with the founder to have them work through each tool in the toolkit – follow the sequence in the methodology to arrive at the end where you can guide the entrepreneur to package their worksheet outputs into an investor "10-slide presentation."
- You should get the entrepreneur on his/her feet frequently and pitch using their completed tools – get each one up at a dry erase board presenting their idea through the tool, and then coach and offer feedback on this.
- Founders often need "tough love" to bring out the best in them, so be prepared to push back on founders as they present their completed tools – probe, poke, and question the findings as well as push for brevity and clarity
- Coaching entrepreneurs works best in a collaborative session with other founding entrepreneurs, so try to assemble a group of six to 10 entrepreneurs and engage them through a formalized ideation program.
- Entrepreneurs often have short attention spans, so it's important to structure each session on a specific tool, and keep everyone moving with a level of intensity. You need to corral the group together to share advice, insights and opinions – you are the lead coach but the others in the room are the "friendly advisors."



Coaching in a Group Setting – the WKI Ideation Program

WKI is ideal for group coaching sessions as it is an interactive, discussion driven tool set. You should engage a group of between six to 10 people with ideas – that is: researchers, scientists and entrepreneurs. Avoid onlookers and observers – this sets the wrong tone and style for the session.

You can structure your group coaching sessions in the following ways:

- Assign one WKI Design Module to be completed in advance of each session.
- Schedule working sessions where clients come to discuss their draft of the design tool for their idea.



- Mix it up and have some coaching sessions devoted to working sessions applying the tools and others focused on presentation by clients and discussion.
- Invite a mix of inventors (scientists and researchers) as well as entrepreneurs. It can also be a cross-section of science and technology. Experience has proven that cross-pollination works, as everyone has a common language and toolset to work from, so conversations and advice focus on the application of the methodology.
- Keep the focus on the frameworks and the insights being shared from the frameworks. You will want to emphasize and reinforce key concepts that are applicable to the broader group, even though it may be coming from one particular individual.
- Stay on your toes – follow follow the recommended structure for the Ideation Program to ensure maximum value from the process.
- Always follow the Ideation Program logistics sheet (found in Section 4 of this Playbook and in the Online Coaches' Resource Center) to set the stage for group coaching.

1:1 Coaching

Coaches often engage with clients on a 1:1 basis, and the WKI Design Your Business platform is ideally suited for these engagements. To begin, identify whether your client is a researcher, scientist, or entrepreneur and adjust your approach to suit.

Refer to Section 4 of your Certified Coach Playbook binder for more best practices and techniques for running Ideation Programs.

- 1:1 coaching requires the client to prepare his/her worksheets in advance of the session – this is necessary for you to create productive, high-value meeting for both you and the client. Ask your client to come to the meeting with a draft of one or two worksheets completed from the WKI Design Your Business platform. This sets the stage for you to engage in a common language to discuss the business aspects of the idea and the opportunity it represents.
- Schedule face to face or online meetings rather than relying on email exchange. It is crucial for you to interact with the client. (Phone and email discussions in between formal sessions are fine, but avoid this being the primary form of engagement.)
- If you use email, focus on assisting with the mechanics of the tool development. Keep the discussion regarding the business or commercial opportunity for the in-person sessions.
- The draft worksheet(s) should drive your coaching session – you should review your coaching reference guide in advance of the coaching session to remind yourself of the best practices in using each frameworks.
- Keep 1:1 coaching sessions short and frequent – these can be exhausting for everyone involved, so try to stick to 60 minutes and focus on a specific tool topic.

Key Success Factors

Effective ideation programs, whether they are online or in-person or group Ideation sessions, depend on establishing best practices from the beginning. Follow these guidelines to create a successful program that will help your clients get the most out of the WKI methodology and design tools.

- 1** **Preparation is key** – Your clients need to do the work prior to any coaching session to make sure that they are active participants in using the WKI toolsets.
- 2** **Strength in Numbers** – The WKI tools really come to life in a small group setting, where people can dialogue, debate and engage in conversation. Try to assemble a group of six to 10 people for your Ideation coaching sessions. Ideally you want founders with ideas in the room who can act as sounding boards to each other. These individuals bring a different perspective and new thinking about customers and opportunities will unfold.
- 3** **Appoint a “designated driver”** – you need participants as well as someone to drive and focus the discussion. Appoint one person to facilitate and drive the discussion. Back seat drivers are always annoying and dangerous in these situations.
- 4** **Flipcharts work best** – They are in your face and promote open dialogue. If you want to kick-start the exercise, give people post-it-notes to label their own ideas on the Market Fishbone. But don't let the exercise become "pin the post-it-note on the tool." What you want is a lot of discussion and sharing of ideas around the table.
- 5** **Experiment** – The most useful tools are full of notations, side-bar notes, and call-outs. As the tools evolve, they begin to look cluttered, messy and disorganized to a passerby. But to participants, it captures the essence of the exercise. Be open to trying different combinations and derivatives. Don't look for the “right” answer out of the gate. Avoid the temptation to critique as you go – let the ideas flow and be patient as you work through the process.

Creating Great Illustrative Examples

The best WKI coaching sessions incorporate illustrative examples and case studies from current, local, real-world science and technology ideas and/or companies.

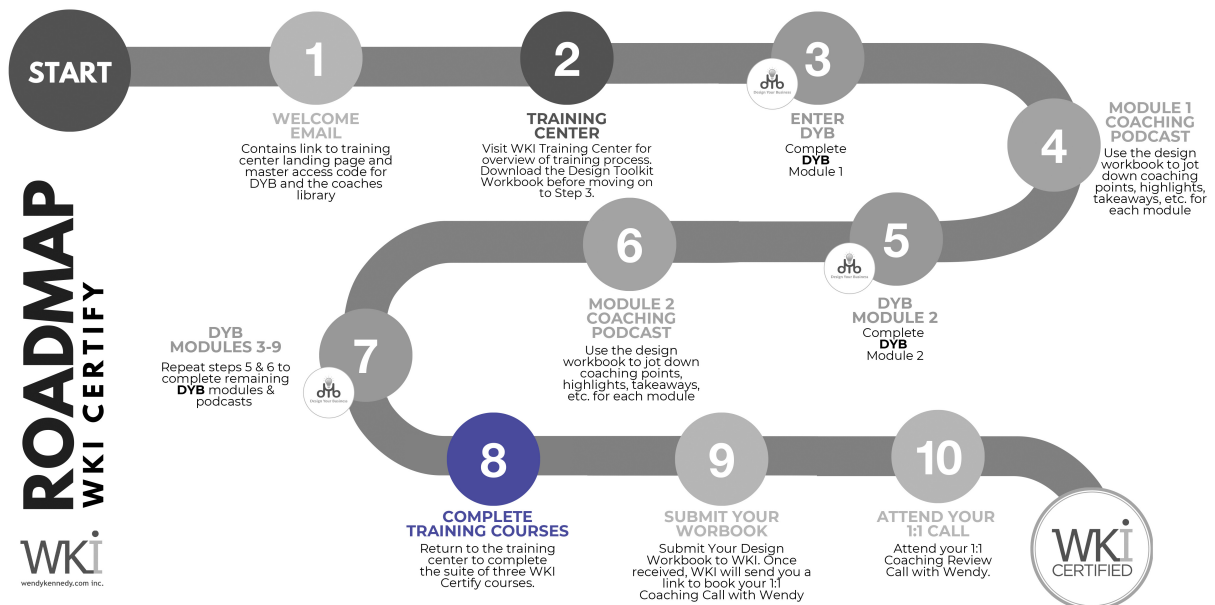
Here's how to ensure you choose strong illustrative examples:

- 1** Choose emerging science and technology ideas.
- 2** Look for ideas that are new and novel but that participants will be able to grasp. If an idea is too complex or abstract, you'll spend more time explaining what it is rather than fostering commercial thinking using the toolsets.
- 3** Likewise, you should focus on the application of the tool(s) rather the science or technology in the example. Your talking points should reflect the value of the tool in helping the founder to articulate the commercial value.
- 4** It's sometimes best to have one illustrative example per tool – this way you can focus in on the specific aspects of the example that apply to one tool. If you get lucky you'll find some examples that can showcase the full suite of tools, and those examples also make great workshop cases.
- 5** You can map the WKI tools. Test this out for yourself -- does the example map well to the series of tools or does it showcase the merit of one particular tool? Do you have enough data/insight about the example to complete the tool?
- 6** The best illustrative examples are the ones completed by your own clients – the founders who've "been there and done it". If you can, use these as working examples. This also adds tremendous credibility to your programs. (Oh, and, don't clean up the drafts of their tools – they're more credible left as originals!



WKI Ideation Program

You Are Here...





WKI Ideation Program

The WKI Ideation Program is dedicated to helping your clients roll up their sleeves and develop the business value proposition for their own ideas. This is where the WKI methodology comes to life!

Innovators are high-energy people who expect results, so ideation workshop sessions need to be productive and high impact – it's all about execution! To make that happen, the sessions need to be short and high energy, each with a specific topic focus, tool and outcome.

It's important to set the agenda up front. The Ideation coaching sessions provide a structured approach to design the business value proposition for a new idea or innovation. As such, the meetups should not be run as casual drop-in sessions. Clearly communicate the time commitment to participants. They should clear their calendars for these time slots and commit fully to the program.

As a coach, your role is to structure and steer sessions but not to lead the discussions. Think of yourself as a passenger who is navigating with a road map for the session.

You'll need to ensure each client reaches a decision/outcome during each session, so it's best to focus on one tool per session and drill down into it with lots of group discussion. Group interaction and presentation keeps clients focused and engaged as they are developing their business value proposition and contributing to the work being done by other clients in the room.



Key Success Factors:

- **Led** by a Certified Coach but focused on the needs of the founder(s).
- **Action oriented:** every session must end with decisions made and a WKI design tool populated by each founder.
- **Small-group format:** a group of six to ten individual founders sharing opinions and ideas while playing the sounding board role for one another.
- **Roll up your sleeves:** get founders to close their laptops and mobile devices to focus on the work of applying the WKI methodology to their ideas.
- **Working Meetings, not training classes:** founders will think, plan, and present using the WKI toolsets as their roadmap. These are working meetings, not training sessions.
- **Passion:** the best Ideation Meetups are full of energy and often passionate debates.
- **A program:** rather than general coaching and mentoring, Ideation sessions provide a program approach to defining the business value proposition.
- **Commitment:** coaching sessions should not be run as casual drop-in sessions –clients need to clear their schedules for the ideation sessions.

Program Elements

1. Choose a Venue for Your Ideation Program

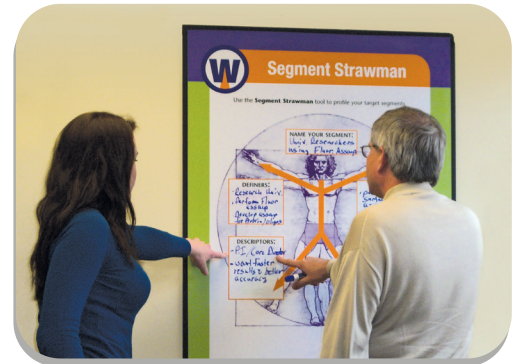
A standard room should be designated as the room where the Ideation Program happens. This helps to develop awareness of the program as well as a connection between the program and participants. It needs to be spacious enough for:

- Hanging a minimum of four dry-erase whiteboards of the frameworks in the WKI methodology on the walls.
- Small-team breakout discussions.
- Cross-table discussions between groups and participants.
- Two or three people working at a dry-erase board.



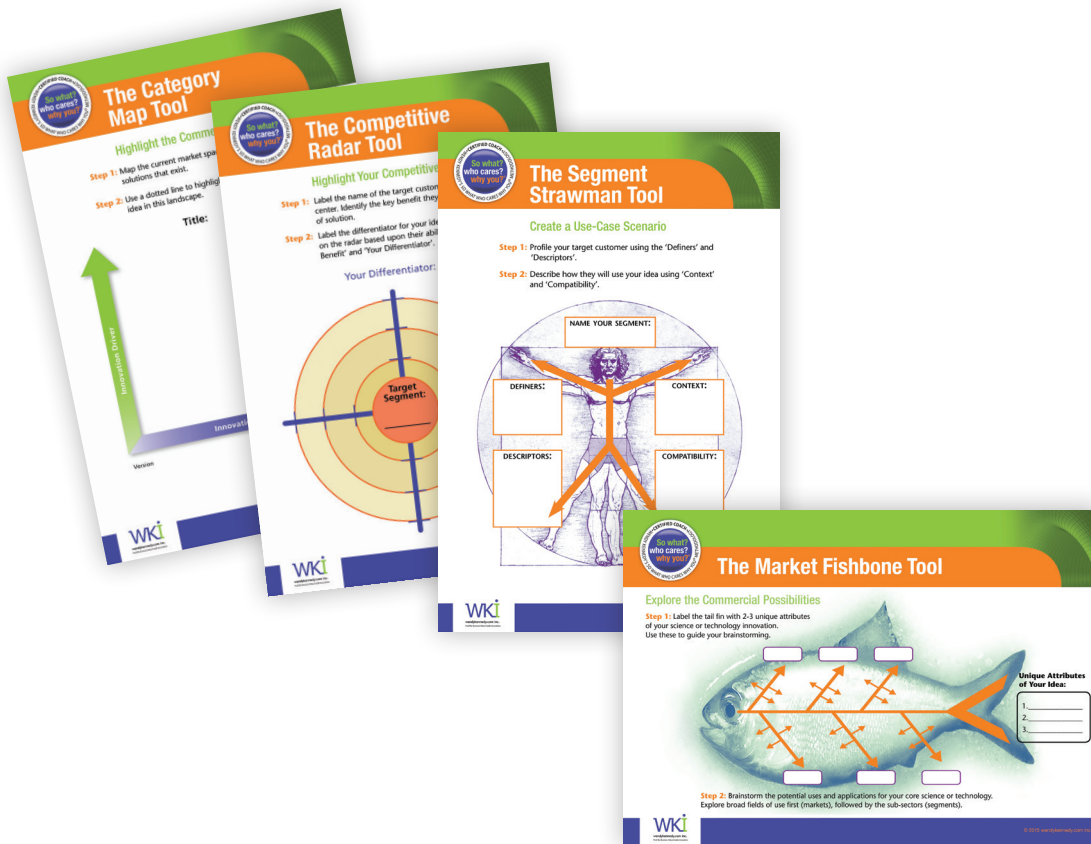
2. Recruit Six to 10 Founders in Each Program

The Ideation Program works best with six (6) to ten (10) participants. They should all be clients with their own innovations – not consultants, advisors, and so on. It's important that founders are the majority, not the minority, in the sessions. The founders don't need to be from the same technical field or industry. In fact, mixing people from different sectors encourages broader thinking and discussion and forces them to speak the language of business rather than their own subject matter lingo.



3. Display Dry-Erase Boards of the Tools

The dry-erase WKI frameworks are a central component of the Ideation program. These boards should be mounted and displayed permanently in the room. Their purpose is to allow participants to interact and contribute to the development of each other's ideas. As a side benefit, the wallboards are a great way to build awareness of your ideation program within your organization.



4. WKI Design Your Business

WKI Design Your Business provides a full suite of training and support resources for innovators. Tool tip videos, tutorials, investor templates, illustrative examples and more are provided for each design tool in the WKI methodology.

WKI Design Your Business provides your clients with the flexibility to engage with the WKI methodology at a pace and place convenient for them. Even more, it provides an engaging format to think through each design tool as they shape their understanding of the business value for their idea.

You can learn more about WKI Design Your Business on our website at: <https://wendykennedy.com/dyb>



Design Your Business



5. Design Toolkit Workbook

Participants should use the workbook of worksheets to draft their work. This workbook can be accessed as part of WKI Design Your Business digital platform or as part of the print toolkit described above.



Ideation Program Structure

The WKI methodology comes to life through coaching and conversations to explore the value of new ideas. Using the WKI methodology, Certified Coaches lead a small group of innovators and entrepreneurs to develop and discuss the business value of their ideas. The session follows an interactive, discussion-driven process, with all participants sharing in the development of each other's value propositions.



Coaching sessions frame the conversation with innovators and entrepreneurs to focus on specific aspects of business value, exploring these through the WKI design thinking toolsets. The goal is to guide participants to apply the methodology to their own ideas.

The Ideation Program is structured using the best practices indicated below:

1. Participants

You should aim to have a minimum of six (6) and up to a maximum of ten (10) participants who have their own ideas to put through the methodology. Each Ideation session focuses on the “drill down” and application of the methodology to each participant’s idea. Avoid having too many “observers” or onlookers in these sessions as this changes the “founder” dynamic you are looking to create.

2. Schedule

Ideation Program sessions should be held weekly to ensure momentum for the program. A schedule should be set on day one and ideally follow the same day and time each week. Each ideation program can have from six to nine sessions, depending upon how you like to structure your program. Participants need to clear their calendars for pre-determined schedule and commit to the full program. It does not work when people attend at their leisure and participate only when convenient for them.

Each session should be approximately three hours in length and focus on one specific topic and toolset in the WKI methodology. Between six or nine sessions are suggested for the program, but you can add more sessions and topics to suit the needs of your participants. A sample schedule is listed below. Nine sessions will complete one module per week, for nine weeks.

Theme	Tool	Focus
Session 1	So what?	Napkin Drawing Tool
Session 2	So what?	Category Map Tool
Session 3	Who cares?	Market Fishbone Tool
Session 4	Who cares?	Segment Strawman
Session 5	Why you?	Competitive Radar Tool
Session 6	Why you?	Value Proposition

3. Ideation Program “Meeting” Room

A meeting room should be identified as the WKI Entrepreneurial Ideation Room, where weekly sessions are always held. This will help to develop awareness for the program and establish a connection between the participants. Dry-erase posters of the WKI tools should be mounted in the room to "brand" it and provide the foundation for program participants to present the drafts of their completed tools.

If your program is an online, virtual format, it's important to create a connection space for participants to share ideas with you and each other. Slack, Channels in Microsoft Teams, and Google Hangouts are examples to create a private area for group sharing. You should begin the program by creating a virtual breakout room exercise using for example, the virtual whiteboard and asking participants to share their results in your private workspace.

4. Client Resource Materials

Participants in the Ideation Program must have access to WKI Design Your Business. Each participant will require this as a reference and resource for completing the frameworks. Coaches should orient all participants to these support resources and give them an orientation so they are familiar with using the resources to prepare and draft their frameworks for each meeting.

5. Pre-Work Preparation

A key success factor for the Ideation Program is the preparation of participants. In advance of each coaching session, participants must commit to completing the worksheets found at the end of each module in the WKI methodology. Participants need to know that their involvement in the program requires them to do advance preparation and come to the meetings with drafts of their completed frameworks.

6. Presentations

During each ideation session, participants take turns presenting the application of a specific WKI design tool to their idea. The participant puts the completed tool up on the dry erase wall board or the virtual whiteboard and presents his/her thinking to the group. An example of this would be a participant putting his/her category map up on the wall board and presenting the commercial opportunity for the idea using the category map framework. Large dry-erase wall boards of the WKI methodology are used to capture the worksheet homework, which then fosters interactive discussion and contributions of all participants in the Ideation Program.

Tip: Your Certified Coach Toolkit Reference Guide is designed designed for use in these sessions. It will help you to facilitate these sessions and keep the group on track. Also, be sure to visit the online resource library for WKI Certified Coaches. It is located at: <http://coaches.wendykennedy.com>

Tip: Participants need focus and structure, so keep to a specific topic in each session. Avoid jumping ahead to cover other topics – deliver on the task at hand. You'll know you have been successful if all participants leave each session with one completed framework and a draft of their business value points related to that single framework.



7. Summaries and Take-aways:

During each session, a minimum of three separate ideas should be presented and discussed, allowing a maximum of 30 minutes for each one. The goal is to look for a mix of different ideas that can showcase unique insights resulting from the founder's use of the framework. Each individual presentation should be summarized with the key take-aways for everyone based upon the discussion.

8. Coach's Role:

During each session, the coach guides the group to the best-practice application of each framework. The coach should follow a structured sequence by taking each idea and participant as a separate case example, instead of having everyone present and then participate in an open-ended collective discussion. While the key take-aways will be case-specific, they will offer important advice and insights applicable to everyone in the program. The coach should be conscious to not make all feedback and suggestions subject-matter specific, but relevant to the framework being discussed. This approach will result in the feedback and discussion offering value to everyone and not simply the founder of the idea being presented.

Throughout the session, the coach should encourage comments, feedback, and questions from other founders in the room. The coach should be clear at the first session that the clinics are highly interactive and discussion driven. The goal is to create an open forum soliciting participant input, curiosity, and in some cases, debate over the concepts.

WKI Ideation Program Guidelines

Follow these delivery guidelines during each of your ideation sessions:

1. In advance of each session, participants should complete the module/framework(s) for the day's focus area and topic. This prep work will form the basis for their presentation and discussion.
2. All founders must come to the meeting with a draft of the completed framework. You can also structure your clinics to allow time for founders to work on their worksheets – this will depend on your style and approach. Either way, keep most of the time allotted for collaboration and conversation.
3. Each founder will take a turn presenting his/her draft framework showcasing their idea. Allow approximately 30 minutes for each founder's idea:
 - 5 minutes to present the idea
 - 15 minutes for focused discussion and development on a single idea
4. Once the idea has been presented, encourage other members of the group to become part of the "extended team" for the idea by asking questions, making suggestions for improvement, critiquing and offering input and advice.
5. It's important that key points get captured by you and the founders. At the end of each founder's presentation, summarize the key points and reinforce points that can help everyone. Encourage everyone to take notes.

Don't Forget:

Also be sure to visit the Coaches' Online Resource Center for advice and suggestions, along with updated materials to ensure your success! It is located at <https://coaches.wendykennedy.com>. Use your login details provided to you by WKI.



WKI Ideation Program

Best Practices Checklist

- 1** **Make it real!** Set up the Ideation Program room with dry erase wallboards mounted on the wall. This will create some curiosity and buzz. Always use the room when working with founders - it will become the "go-to" meeting place to shape and design business value. If your program is virtual, use images of each framework (available for download from the Certified Coach Resource Library). Share your screen and use a drawing instrument to focus attention on key points of each framework.
- 2** **Recruit some "Friendly Founders"** the ones you know will be most receptive to the process. They'll help to spread the word and vouch for the value of the process.
- 3** **Establish a standard meeting place and time** for your sessions and have participants commit to the full schedule of sessions. If your program is virtual, poll participants to find the best day of the week and time and commit to this as your standard meeting date.
- 4** **Use worksheets** to drive application of the WKI tools. Focus on one module/tool topic in the methodology per session.
- 5** **Use lots of "show and tell".** Encourage open dialogue and debate about tool drafts.
- 6** **Steer conversations** back to business value topics and frameworks. Minimize the scientific debates and circular conversations.
- 7** **Capture key take-aways** at the end of each session and encourage each participant to take their own notes.
- 8** **Work with clients** to help them integrate the output of their completed frameworks into value proposition documents, investor presentations and funding applications.
- 9** **Celebrate successes along the way.** Positive reinforcement is a big motivator.
- 10** **Keep an energetic pace to maintain momentum.** Get founders engaged in the process - mapping the frameworks, discussing, debating and presenting.



WKI Ideation Program

Getting Started Guide

- 1 Position this as a program vs. an individual coaching session.** Clearly communicate the time commitment required by participants, and the value they will get. They should clear their calendars for these time slots and commit fully to the program in order to achieve the outcomes at every session. The WKI Ideation Program should not be run as casual drop-in sessions.
- 2 Guide but don't drive the discussion.** Your role is to navigate. Avoid any temptation to lead the discussion. The founders must be the main contributors to the development of ideas using the toolsets. Encourage discussion between founders and jump in only as a means of moving the discussion forward.
- 3 It takes a village to raise an idea.** Create a team environment. A group of six to ten founders sharing opinions and ideas while also playing the role of advisor to one another works well.
- 4 Lose the laptop!** The kiss of death in a Ideation Program session is to have participants with their heads buried in laptops or mobile devices. These sessions facilitate business value proposition development through visual modelling, so founders need to use the dry-erase wallboards, flipcharts, sketch pads, worksheets, etc. to map out their thinking.
- 5 It's about execution –** Every session should end with decisions made and a tool populated for each founder
- 6 Energy is important.** Keep the momentum high. Your role is to keep the discussion moving, summarize key findings, and use the tools in a disciplined manner to drive outcomes and results. These sessions should be full of passion, energy and often heated debates.
- 7 Go to the wall!** Always drive the discussion from the founder's completed framework draft and use the dry erase posters as a common conversation point to bring everyone into the discussion.
- 8 Keep the discussion from straying off topic.** Stay focused on one framework topic per session. Have a plan for the session(s) and share this with participants at the beginning.
- 9 Explore and experiment!** The most successful frameworks and worksheets are full of notations, side-bar notes, and call-outs. As the frameworks evolve, they begin to look cluttered, messy and disorganized to a passer-by. But to participants, this captures the essence of the work. Be open to trying different combinations and derivatives. Don't look for the "right" answer out of the gate.



Ideation Program Logistics Checklist

Logistics are a critical component of a successful WKI Ideation Program. The structured approach and visual tools make it different from other programs, but it requires a specific set up to keep founders energized throughout the session.

Invest your resources in these logistical details to ensure the best possible experience for you and the participants.

Item	Details	Tips
1. Room	<ul style="list-style-type: none">• Lots of wall space for hanging dry erase posters.• Able to accommodate 10-12 people, both sitting and standing at the dry erase posters.• Avoid classroom and theatre style rooms. Look for meeting style.	<ul style="list-style-type: none">• Designate a room as the Ideation Program room and post dry-erase boards on the walls.
2. Roundtables	<ul style="list-style-type: none">• 3-5 participants per table	<ul style="list-style-type: none">• Please ensure plenty of room between tables to allow for movement and gathering around a flipchart
3. Number of Participants	<ul style="list-style-type: none">• A minimum of 6 to a maximum of 10	<ul style="list-style-type: none">• Include enough participants to ensure dynamic discussion and debate.
4. Dry Erase Posters	<ul style="list-style-type: none">• Four-color posters of the tools	<ul style="list-style-type: none">• Mount the dry erase boards on the walls around the room
5. White Boards	<ul style="list-style-type: none">• Two flipcharts or whiteboards are ideal for sketching and discussion.	<ul style="list-style-type: none">• Encourage clients to use the whiteboard to capture action items, key points to take away etc.
6. Dry Erase Board Markers	<ul style="list-style-type: none">• Two sets of 4 markers at a minimum - different colors.	<ul style="list-style-type: none">• Test the markers before every session to be certain they aren't dry. Nothing frustrates people more than markers that don't write.

SECTION 5

Program Launch

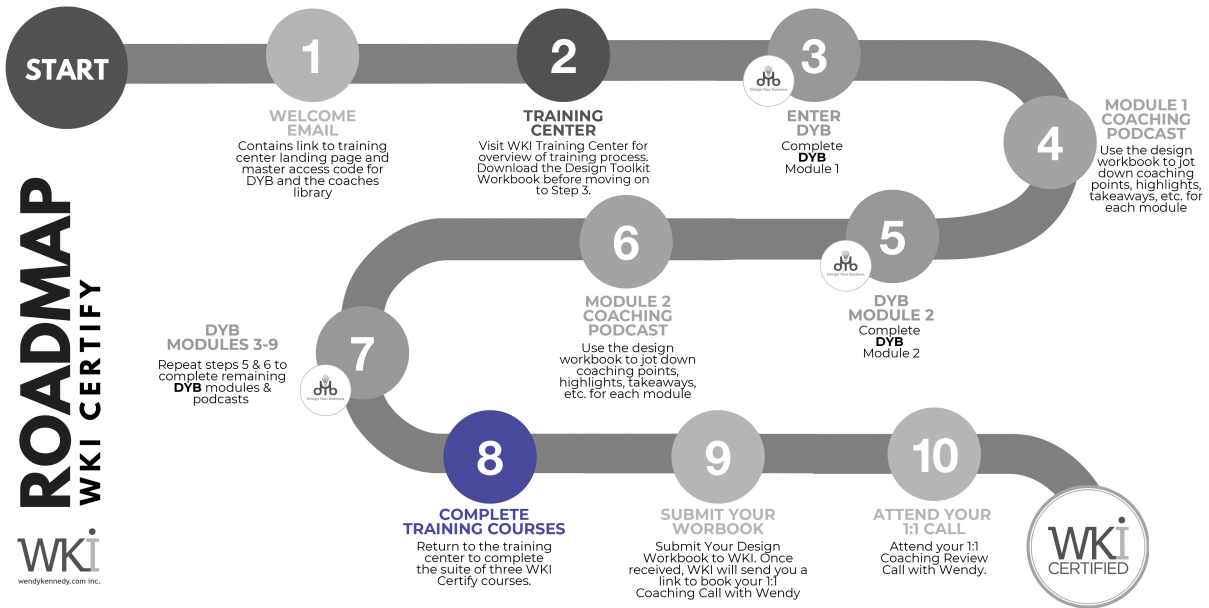
With your new skills in hand, it's time to talk about your action plan. In this section we review marketing ideas and launch plans to get your program off the ground.





Marketing Your WKI Program

You Are Here...





Entrepreneurial Ideation Program

As a WKI Certified Coach, you are now equipped with new knowledge, insights and resources that can make a profound impact throughout your organization and community. But, any new initiative requires building awareness and knowledge to launch it successfully. You'll want to recruit clients to take part, but you'll also want to reach into your community to engage with local agencies and offices that are keen to support your program.

Here are ten action items that will help you to get started:

- 1** **Brief Your Team.** Share what you've learned with your team and how it can help your organization achieve its goals. This will also help to rally support and get everyone aligned around the role that the WKI Certification and Ideation Program plays in your community.
- 2** **Create a Game Plan.** Determine the following: What's your WKI coaching strategy? Who is the first target group? Who are the influencers? Consider drafting a Market Fishbone segmenting the potential groups of participants in your ecosystem. Then look for the burning pain where launching your program can solve a real problem.
- 3** **Define Your Program.** What will your Ideation Program look like? How many participants per session? How long will each session be? Will you charge a fee and if so, how much?
- 4** **Make it Visible.** It's important to make your Ideation Program as real and tangible as a new program for your internal staff and stakeholders. We recommend:
 - a. Get your Entrepreneurial Ideation Program room set up with the dry-erase boards mounted on the walls – these will serve as one of your best sales tools. Even if you're program will run primarily online, make a point to create this physical presence to build awareness of your program.
 - b. Build visibility for your Ideation program through a web page, social media and perhaps a printed leaflet.
- 5** **Drive.** Take an innovation you are familiar with and map out the business value proposition using the toolkit, dry-erase boards, worksheets, etc.
- 6** **Practice!** Create a mock session with your colleagues to practice coaching. It's also a great way to introduce them to the WKI methodology and tools.

7

“Soft launch” your program. Use the tools with a few clients to develop your coaching technique and style.

8

Recruit Evangelists. Recruit some champions who will help to spread the word about WKI and your coaching programs. Injecting entrepreneurial DNA into your community benefits everyone, so approach people who will help to champion the effort and spread the word.

9

Experiment. We’ve given you tips, techniques, and advice. Now it’s over to you – don’t be shy to experiment to find what works for you and has the most value for your clients.

10

Have Fun With It! There is no doubt that the WKI methodology can deliver powerful results, but it’s also fun to work with. Enjoy the experience and always, always use color and illustrations to brighten things up!



Getting Started Checklist

This playbook has provided a rich toolbox full of many tips, techniques, checklists and critical success factors derived from our own experience in delivering entrepreneurial programs. And, you will no doubt have your own ideas about priorities and techniques as you build your capabilities using the WKI tools.

To get you started, we've flagged certain strategies that we feel are worth investing in right away.

Strategies to Get You Started

- 1** **Gain Internal Support.** Meet with your peers and colleagues to present the methodology and generate enthusiasm. Use the overview presentation available in the Online Coaches Resource Library.
- 2** **Recruit some friendly founders to take part as early adopters.** The goal is for these people to become your best ambassadors to get other founders to take part.
- 3** **Bring founders together in small groups.** While one-on-one coaching also works effectively for some people, a small group of entrepreneurs sharing and learning together is magical. Entrepreneurial Ideation is a natural fit for 6-10 early stage founders.
- 4** **Develop two or three illustrative examples** that you are familiar and comfortable with. Follow the checklist on page 28 of this Certified Coach Playbook to create these.
- 5** **Remember the 1/3: 2/3 split:** spend 1/3 of the time talking and 2/3 coaching the participants as they talk and interact. Strive to be conversational and discussion oriented.
- 6** **Use current, real-life examples.** Stay current with entrepreneurial success stories that depict a best practice of the WKI design tools.
- 7** **Make it a program, not a casual drop in.** Offer a program with real commitments, take-aways and outcomes. For example: "Attend this Ideation program to shape the business value of your idea." Focus on the value you can offer.
- 8** **Seed your community** by having coffee with opinion leaders who can help to spread the word and cultivate interest.
- 9** **Use Social Media** to spread the word about your ideation program and success your clients are having.
- 10** **Stay connected through the WKI Coaches' Library.** Draw from this resource to build your own branded program with WKI inside. Use the templates and support resources to ensure your success!



Marketing Your Ideation Program Checklist

Building visibility for your Ideation Program is a cornerstone to its success. We've collected together the following 'best practices' from our community of certified coaches. Also, please complete the marketing course provided in the WKI Certify training program.

- 1** **Brand your Ideation Program.** Create a name for your program that gives it a unique identity and helps you promote it to your community of innovators and ecosystem partners. Please refer to the WKI marketing kit for guidelines to include WKI branding.
- 2** **Build an Online Presence.** Create a web page for your Ideation Program and how clients, sponsors and community groups can get involved.
- 3** **Go Viral!** Get your founders talking about the program and spreading the word virally, through FaceBook, LinkedIn and other social media. Encourage your community to 'talk it up'.
- 4** **Build Buzz in the Community.** Volunteer to host coaching clinics at local entrepreneurial events to build awareness of your program. Participate in panel discussions talking about entrepreneurship and campus commercialization, sharing the "ideation" message with the audience.
- 5** **Market Your Unique Differentiator.** Focus on the unique aspects of your Ideation Program – show the visual nature of the modelling tools, create a video of a client who's been through the process, show the experience using the tools in the coaching clinic.
- 6** **Get Some Early "Wins".** Get some "lead" customers/clients engaged as soon as possible so you can share their success stories. It's the proof in the pudding. Clients will tell other clients and momentum builds from here.
- 7** **Extend Your Reach.** Look for collaboration opportunities to bring your ideation program to new audiences such as: university commercialization offices, government research labs, research institutes, students, corporations and accelerator programs, etc. Launch targeted programs aimed at different sub-groups of entrepreneurs in your region.
- 8** **Contests and Competitions.** Create your own entrepreneurial competitions and contests to build visibility and demand for your program. Pull together investors, business people, and other local community members to create something that speaks to the need for ideation help for the early stage, on the napkin entrepreneur
- 9** **Celebrate Client Success.** Use your website and social media to promote the success of your clients who've been through the Ideation Program. Feature your clients' success in many ways – in your newsletter, at board meetings, local media stories, etc.
- 10** **Follow the WKI brand standards and guidelines.** WKI has provided a complete marketing kit with guidelines and messaging. You will find this on the Training Center page for WKI Certify. We ask you to please review and include WKI as part of your visibility and marketing plans.



My Action Plan

1. The two most important things I need to do NEXT WEEK are:

- _____
- _____

2. Two organizations that would be potential partners in my Ideation Program are:

- _____
- _____

3. Two “friendly founders” with whom I can practice with the tools are:

- _____
- _____

4. Two key opinion leaders in my community with whom I want to engage are:

- _____
- _____

5. My first Ideation Program will start:

- _____
- _____

6. My first in-house presentation to colleagues will be on this date:

7. I will develop my own illustrative example using the example of this company/product/technology: _____