

EXPLORE – SHOULD WE WORK TOGETHER?

Activities

Click to open proposed method!

[Introduction meeting](#)

[Discuss mindset and values](#)

[Evaluate strategies and seek for possible collaboration areas](#)

[Evaluate possible collaboration areas](#)

[Sign NDA \(if required\)](#)

Outcomes

Strategies are aligned and common goals & possible collaborations areas are identified.

Innovation related values and mindset are aligned

NDA signed (if required)

High-level plan how to proceed together

Questions to be answered during the Explore phase:

We want to understand the dynamics of a possible partnership (mutual agreement)

- Are the strategies and goals aligned? Are there overlaps?
- Are we the right partners for each other?
- What are the possible collaboration areas?
- Do we share similar mindset and values?
- Do we see added value on a general level?
- Do we share the same understanding of the problem worth of solving?

Should we continue? (mutual agreement)

- Plan a high-level roadmap and next steps

In case there are questions we're not able to answer, it is time to go back to the Discovery phase and clarify our assumptions by using Assumptions template.

If every question can be answered with confidence you are good to proceed to the Ideate phase.

INTRODUCTION MEETING

What Is It?

A first meeting that can be face to face or online. The aim of the meeting is to get to know each other and to get a first feeling if a partnership can create value. The idea for this meeting can come from anywhere.

Why Do It?

As a first filter before going deeper into the discussions and spending more time on the potential partnership.

Who Does It?

Whoever (the driver) sees that there is potential value in collaborating and bringing in partners to the table.

When To Use It?

When there is mutual interest in exploring collaboration possibilities.

How?

For introduction meetings where we want to get to know each other, face to face meetings are always preferred if they are feasible. If not, introduction meetings can be held online.

Typical Meeting Agenda:

- Welcome and Safety brief
- Introduction of people and organizations
- Discussion around if there is value in doing something together
- Identifying value through discussion
- Preliminary expectations of the possible collaboration from all involved parties
- Summary
- Potential: View on Open Innovation and what kind of spirit we would like to work in. [Here](#) is how we do it.
- Decision: Stop or go?
- Next steps: What? By whom? When?
- Thank you

Input

[Mindset and values](#) in Playbook

Output

A decision if we are to move further with the collaboration or not. If yes, **how** it will move forward and **when**. Agreed meeting report.

Checklist

Involve relevant stakeholders.

Make sure there is a decision on whether to take the collaboration further or not.

NDA if required. Wärtsilä's target is to have the introduction meeting without NDAs in order to speed up the innovation process.



Number of people

As few as possible.

Maximum 8 people.

Keep the focus on the partnership before involving too many people and go too deep into topical discussions.



Time needed

2 hours max for the meeting

1 hour preparation

DISCUSS MINDSET AND VALUES

What Is It?

The discussion of mindset and values does not have to be a separate meeting. Instead, it is an activity that can be carried out in any or multiple discussions and meetings.

Why Do It?

To ensure cultural fit and build a foundation for collaboration between the parties involved. A common foundation builds trust and ensures conflict can be managed.

Who Does It?

The one who drives the collaboration is to make sure the foundation for collaboration is discussed.

When To Use It?

When there is mutual interest in exploring collaboration possibilities.

How?

For introduction meetings where we want to get to know each other, face to face meetings are always preferred if they are feasible. If not, introduction meetings can be held online.

Openness – Dare to share & Listen to learn

Drive – Keep the goal in sight

Together – One team, one mission

Talent – Unleash your talent

Trust – Work like friends

Agile – Adapt and stay curious

Input

Mindset and values in Playbook

Output

A common foundation for collaboration.
Alignment is well enough to move forward.
Up to Business Owner.

Checklist

Went through mindset and values



Number of people

As few as possible.

Maximum 8 people.

The key people for the collaboration should be involved.



Time needed

Reserve 30 minutes to 1 hour.

EVALUATE STRATEGIES AND SEEK FOR POSSIBLE COLLABORATION AREAS

What Is It?

A workshop or meeting where we try to identify commonalities in the strategies. We seek for overlaps in each partners strategy and possible areas for collaboration.

Why Do It?

The project has a greater chance to achieve value-adding results, when all involved partners have a clear interest.

Who Does It?

All partners that are involved in the project

When To Use It?

After the first introduction meeting when we have a common understanding of the mindset and values.

How?

Organize a meeting or workshop where each participating organization presents their strategy. Each participant will prepare their presentation with a special focus on potential areas of collaboration.

However, no parts of the strategy should be excluded to ensure that we also capture the unlikely opportunities. After each participant presented, try to capture the main strategic innovation areas. Identify potential overlaps and joint interests. Take the overlaps with highest potential in terms of added value forward.

As an example we have a workshop approach that has been used to identify possible collaboration areas.

Input

The strategies of all participating organizations

Output

Collaboration areas

Checklist

Make sure there is a decision on what the highest potential commonality is, who will take it forward and when.

If multiple commonalities are identified, make sure that they will be evaluated separately and taken forward individually.



Number of people

2-3 people per participating organization



Time needed

2-3 hours depending on the amount of partners involved

EXAMPLE WORKSHOP APPROACH



PRE-ASSIGNMENT

- Send out pre-assignment latest 2 weeks (and a reminder 2 days) before the workshop.
- Includes the agenda of the workshop to manage expectations

Present
Capture
Prioritise
Decide

- Presentation to be created as pre-assignment by each party
- Presentation to focus on:

Strategy and main strategic innovation areas
Challenge(s) related to specified innovation area
What could the solution(s) look like?
What benefit would it bring for each party?

PRESENT

- Assign everyone a time slot and be strict on time
- Advise participants to collect questions that arise during the strategy presentations and reserve time for dialogue, Q&A, after the sharing time
- Create a consolidated list of challenges and solutions as a memory aid for the brainstorming session either through collecting presentations prior to the workshop or on-the-fly during the presentations
- Limit discussion and questions during the presentations, these can be taken up in the following brainstorming session

CAPTURE & PRIORITISE

- Divide into groups if necessary (minimum one participant per party per group)
- Use the presentation material as a starting point for the capturing of commonalities (print the material for the groups to use)
- Identify overlaps in the strategies, joint or complementary goals and targets, and through that potential collaboration areas
- Use about 30-45 minutes
- Vote on the identified collaboration areas (e.g. with voting dots)

DECIDE

- Make sure there is a decision on what the highest potential commonality is, who will take it forward and when
- If multiple commonalities are identified, make sure that they will be evaluated separately and taken forward individually. (Not in a one big lump)
- Keep the possibility open that there are no commonalities. In this case we can revisit this session in a later point to see if something has changed.

EVALUATE POSSIBLE COLLABORATION AREAS

What Is It?

At this stage we have a selection of possible collaboration areas and they need to be evaluated.

Why Do It?

To select the collaboration areas with the highest potential in value and impact. And to inform the decisionmakers which will be taken forward to the next phase.

Who Does It?

All involved partners.

When To Use It?

When you want to know which of your collaboration areas has the greatest potential in value and impact, and should be taken forward.

How?

Write down your best ideas for potential collaboration areas. If you have several good ideas but you don't know which ones are the best, write them all down and start evaluating based on the evaluation criteria. The description of the evaluation criteria can be found in the next slide.

Give the scores 1 to x (x being the amount of ideas you are evaluating) to your ideas, 1 being the best value. Note that you have to give a score to all ideas and ideas can't share the same score within each category. Fill this one column at the time. Calculate your final score and note that the smallest score is the best here.

Evaluation Criteria

- Customer / User involvement
- Business Value
- Complexity
- Urgency
- Game Changer

Input

Possible collaboration areas.

Output

The collaboration area(s) with the highest potential in value and impact.

Checklist

All potential collaboration areas evaluated

The ones that should move forward are selected

Decide on who will take it forward and when



Number of people

2-3 per organization



Time needed

1-2 hours (depending on the amount of potential collaboration areas)

EVALUATE POSSIBLE COLLABORATION AREAS

Strategic Fit

Describes how well your ideas fit to our current business strategies. The best fitting idea should get the value “1”.

Business Value

Describes how much value the idea can bring to all involved parties. The value can be monetary but also other types of values should be taken into account (e.g. brand recognition, defending own position in the market, as a sales tool to win additional deals etc.). The idea with the highest value should get the value “1”.

Urgency

Describes how urgent it is to provide this service or product to the market. Urgency can be driven by customer/user demand, but also by competition. Take into account what the costs of not implementing the idea are. The idea with the highest urgency should get the value “1”.

Customer / User Involvement

Describes how much the customer has been involved in the idea. Did the idea come from a customer? Has the idea been discussed with customers? Has the idea been discussed with account managers or other people close to the customers? The idea with the highest customer involvement should get the value “1”.

Complexity

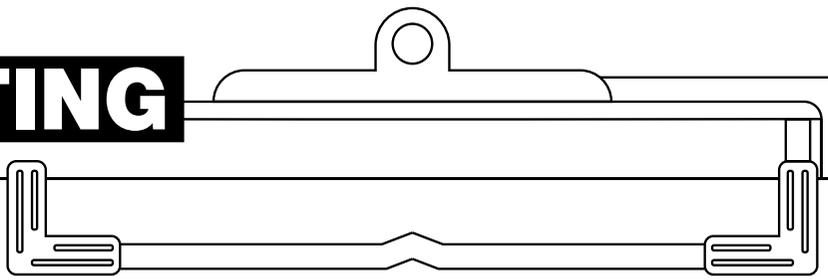
Describes how complex implementing the idea is. Take technical complexity but also organizational complexity into account. The idea with the lowest complexity should get the value “1”.

Radical Innovation / Game Changer

How disruptive the idea is for the market/industry and all involved organisations. Is it something that we are currently not doing very differently i.e. not an incremental change.



EVALUATING IDEAS



IDEA	STRATEGIC FIT	CUSTOMER INVOLVEMENT	BUSINESS VALUE	COMPLEXITY	URGENCY	RADICAL INNOVATION	FINAL SCORE <small>(The smallest score is the best.)</small>

MULTILATERAL NDA

Non-Disclosure Agreements shall be made with the participants before disclosing any confidential information or documentation

[Download the NDA template here](#)

NON-DISCLOSURE AGREEMENT

THIS NON-DISCLOSURE AND RESTRICTED USE AGREEMENT (hereinafter referred to as “**Agreement**”) is entered by and between

- (1) **Wärtsilä Finland Oy**, a company located at Järvikatu 2-4, FI-65100 Vaasa, Finland and incorporated under the laws of Finland (hereinafter referred to as “**Wärtsilä**”); and
- (2) **[INSERT NAME]**, a company located at **[INSERT ADDRESS]** and incorporated under the laws of **[INSERT STATE (e.g. for USA) OR COUNTRY]**, (hereinafter referred to as “**[INSERT COMPANY NAME]**”)
- (3) **[INSERT NAMES OF FURTHER PARTIES TO THE AGREEMENT, REPLICATING THIS CLAUSE AS MANY TIMES AS NECESSARY]**, a company located at **[INSERT ADDRESS]** and incorporated under the laws of **[INSERT STATE (eg. for USA) or COUNTRY]**, (hereinafter referred to as “**[INSERT COMPANY NAME]**”) both hereinafter referred to as “**Party**” or “**Parties**” respectively.

WHEREAS The Parties acknowledge the importance of a constructive business relationship to plan and optimize their long term commercial relationship, for their mutual benefits that will be derived therefrom.

WHEREAS The Parties have since [] been engaged in discussions regarding a possible collaboration project in relation to **[INSERT PURPOSE/TOPIC]** (hereinafter referred to as “**Purpose**”);

WHEREAS the Parties acknowledge that the Purpose may be subject to change as the discussions progress;

WHEREAS In relation to the Purpose, information has been and will be disclosed by either or both Parties or any Related Company of a Party;

WHEREAS The Parties agree that this Agreement will also cover any such disclosure of Confidential Information (as defined below) regarding the Purpose made prior the date of signature of this Agreement;

WHEREAS The Parties want to ensure that such information, which each may disclose to the other, or which information has been disclosed prior to the date of signature of this Agreement, is used only for the Purpose and protected from further disclosure.

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WÄRTSILÄ