

# INNOVATION MANAGEMENT

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Innovation has reached buzzword status inside higher education institutions. Colleges and universities are creating innovation offices and [chief innovation officer positions](#), launching various online and competency-based offerings, and, in some cases, answering to nervous boards of trustees regarding whether their institutions are doing enough to prepare students for an increasingly uncertain future.

Despite the frenetic tone of some of the hype, the concerns fueling this move toward innovation aren't misplaced. New offerings powered by disruptive innovations have entered the postsecondary landscape. There is more pressure on institutions for accountability—to not only enroll students, but also to help them succeed up to and after graduation. College costs have continued to rise even as the average applicant is less able to pay, which has called into question many colleges' sustainability. As a result, innovations that do everything from create efficiencies for existing programs to cultivate new sources of revenue in new programs are in high demand.

Innovation is accordingly becoming a major part of universities' strategies, and colleges and universities are on the receiving end of a flurry of ideas from faculty, staff, students, alumni, vendors, employers, policymakers, and more. The challenge schools often face is not whether to innovate, but how to prioritize and manage the innovation process in a timely and cost-efficient way. The answer to this question differs based on each school's particular strategy—its plan to achieve a set of goals based on individual circumstances. The key lies in aligning the innovation management process with the unique strategy of each school to deliver on the institution's overarching goals.

What follows is a complete process for managing innovation at your institution, although not every institution will want or need to implement the entire process. Aspects of the process can be implemented in various sequences. For institutions that are not ready to embark on a full commitment to innovation management, parts of the process can even be incorporated into existing ad hoc committees to promote more transparency and efficiency while better managing risk and creating opportunities.

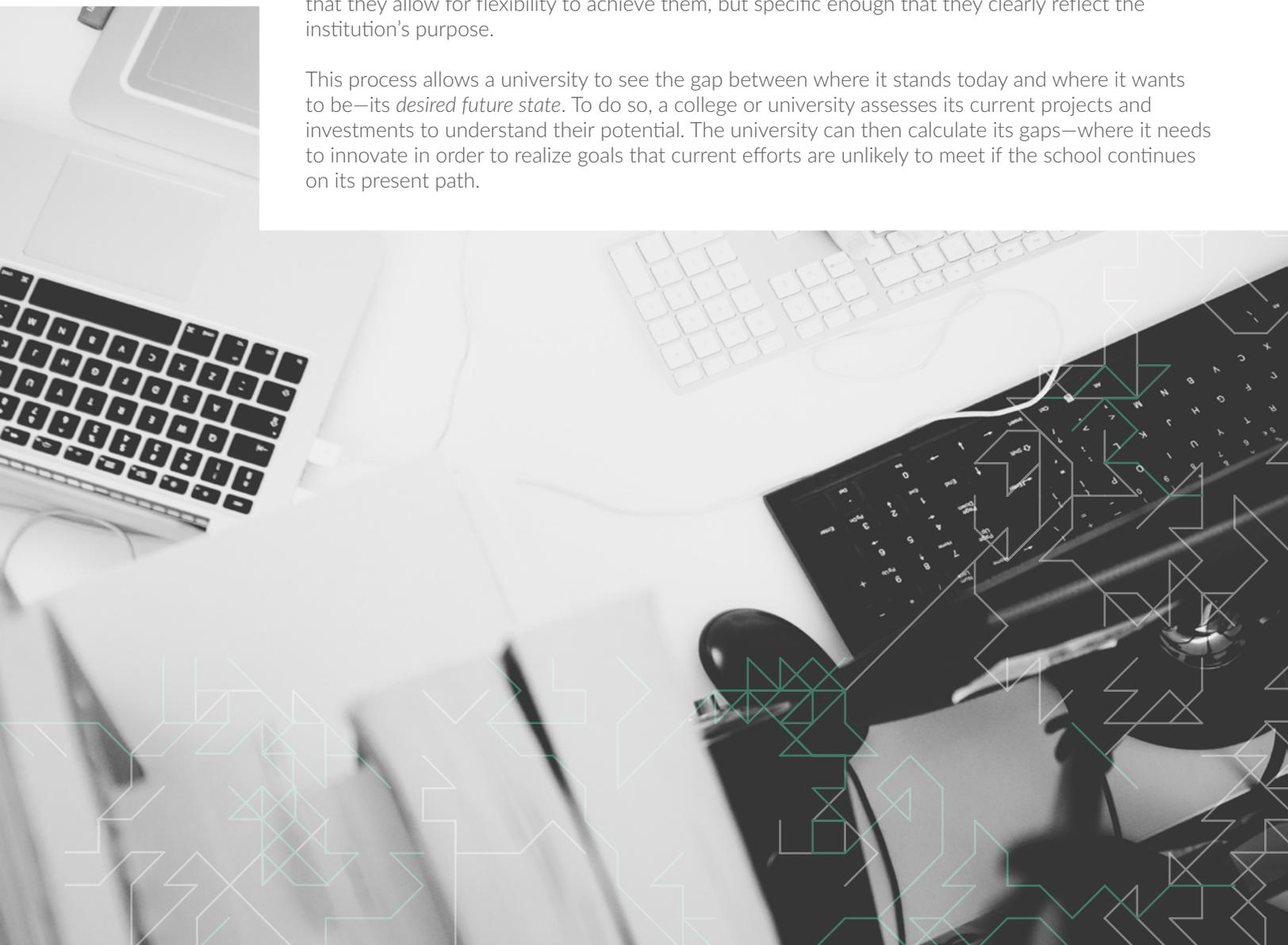


THE CHALLENGE SCHOOLS OFTEN FACE IS NOT WHETHER TO INNOVATE, BUT HOW TO PRIORITIZE AND MANAGE THE INNOVATION PROCESS IN A TIMELY AND COST-EFFICIENT WAY

## STEP 1: CLARIFY THE GOALS AND THE GAPS

Any attempt to manage innovation begins with identifying the gap between an institution's goals and objectives and its current efforts. Unlike most businesses that exist largely to grow the bottom line, colleges and universities have complex missions with many goals, which makes the need for intentionality all the more critical. To innovate successfully, an institution has to know *why* it is innovating and *what* it is trying to achieve. This requires that a school clearly articulate its desired outcomes and measures of success. These measures may include goals around enrollment, revenue, costs or productivity, student success, student composition, culture, faculty growth or diversity, community engagement, curriculum or course design, and links to employers. They can be complex and multifaceted. The key is for the desired outcomes to be measurable in concrete ways and time bound such that it is clear what constitutes success. And the measures must stay high-level enough that they allow for flexibility to achieve them, but specific enough that they clearly reflect the institution's purpose.

This process allows a university to see the gap between where it stands today and where it wants to be—its *desired future state*. To do so, a college or university assesses its current projects and investments to understand their potential. The university can then calculate its gaps—where it needs to innovate in order to realize goals that current efforts are unlikely to meet if the school continues on its present path.



## STEP 2: BUILD THE STRATEGY

The gaps between where a college stands in relation to its goals are the areas in which it needs to innovate to make progress. If a university needs to boost revenue beyond its current operations and investments, for example, that may require a variety of moves, from creating new programs to adding students in existing programs to leveraging existing assets in creative ways to drive growth. Determining what it will do—and also what it will not—is where strategy enters.

We recommend that colleges and universities start by clearly defining what is out of bounds—what are the things they won't do because it violates their mission and purpose or feels too far afield from their expertise. For example, a small liberal arts college might say that quadrupling enrollment in its core program is a nonstarter.

Next, the institution must design a strategy. We recommend initial strategies that are specific enough to help everyone understand what the college or university is driving toward but also leave room for flexibility as circumstances change, people discover what is and is not working, et cetera. Strategy-making ultimately involves both a deliberate, top-down process, as well as emergent elements that people on the ground build as they make day-to-day decisions that are retroactively codified.

A sound initial strategy starts with a statement of purpose—why the institution is tackling this work and what success looks like—which is done in the first step. Then, it focuses on what the university will do to deliver on the why and how, as well as who it will serve.



## STEP 3: IMPLEMENT A PORTFOLIO APPROACH TO EXECUTE THE STRATEGY

With clear goals and gaps identified and a clear sense of what the university will—and perhaps more importantly will not—do, it's time to start investing in innovation. But how does a university determine which innovations it should invest in to deliver on its strategy?

Fortunately, there are tools to manage this process. One key tool is called “aggregate project planning” (APP), which links an organization’s intended strategy with the mechanisms through which resources are allocated across different types of projects. A sample APP framework appears below. It has been adapted from Steven Wheelwright and Kim Clark’s 1992 article, [“Creating Project Plans to Focus Product Development.”](#)



Figure 1.

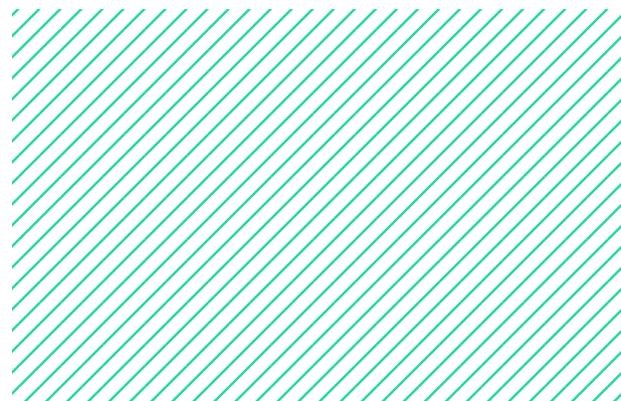
## DETERMINE THE IDEAL MIX

The idea is that in order to achieve their goals, colleges and universities likely need to invest in a range of innovations. The innovations outlined in Figure 1 are examples and should be adjusted based on the exact nature of what an institution is trying to accomplish. For the sake of illustration, here are three distinct innovation types:

- “Core” innovations are those that optimize existing services for existing students and stakeholders. Because these innovations are, by nature, incremental and improve on existing services, they are likely to make modest contributions to advancing a school’s goals.
- “Adjacent” innovations are those that expand existing offerings or services to serve new students or stakeholders, or innovations that provide new services or offerings to existing students or stakeholders. For example, a university that already serves graduate students online might leverage existing resources to launch a new online master’s degree program but with a new, mobile-first interface.
- “Transformational” innovations are those that develop new services for new groups of students and stakeholders. These innovations are typically higher risk because of the number of unknowns involved, but they also should offer the greatest opportunity to contribute to closing the gap in an institution’s goals.

Whatever categories of innovation a school defines, it should look back to past projects that would fall under each category that it has done—or examples of appropriate projects that other institutions have done—to understand the likely contribution toward its goals. Ultimately, the gap between a school’s desired future state and its current position helps determine the mix of successful innovations it must launch.

Colleges and universities should also look to their past—or those of other similar institutions—to understand the rate of success of different types of projects. For example, because transformational innovations are inherently risky, a university might have only successfully executed on one out of every four proposed transformational innovations. As a result, to successfully launch a transformational innovation, the school should assume it will have to invest in at least four attempts. Institutions should also define the average financial and time investment for each type of innovation so they can budget and plan accordingly.



## DETERMINE CAPACITY

The act of budgeting and planning flows into the second step in aggregate project planning: juxtaposing the innovation projects that are required to meet the institution's goals with how many projects the university has the capacity to execute during any given period. This step is critical but difficult, as organizations often overestimate their capacity for taking on new things. Institutions typically find that they have limited capacity to launch innovations—for both human resource reasons as well as budgetary ones. For example, many schools find that they don't have capacity to launch more than one successful transformational innovation every four years. If an institution's goals call for several successful transformation innovations

in a short time frame, then it should take a step back and reevaluate its objectives. To give an example of what a typical mix might look like in the commercial sector, Procter & Gamble invests 60 percent in "sustaining innovations," 20 percent in "disruptive innovations," and 20 percent in what it calls "commercial innovations," according to Innosight, a strategy consulting firm. According to Clayton Christensen in the Harvard Business School note "[Using Aggregate Project Planning to Link Strategy, Innovation, and the Resource Allocation Process](#)," a company might invest 10 percent in transformational projects, 30 percent in adjacent projects, and 60 percent in core projects.<sup>1</sup>



**ORGANIZATIONS OFTEN  
OVERESTIMATE THEIR  
CAPACITY FOR TAKING ON  
NEW THINGS**

<sup>1</sup> In the note, Christensen uses the terms "breakthrough," "platform," and "derivative." We have taken the liberty of using terms more appropriate for a higher education setting.

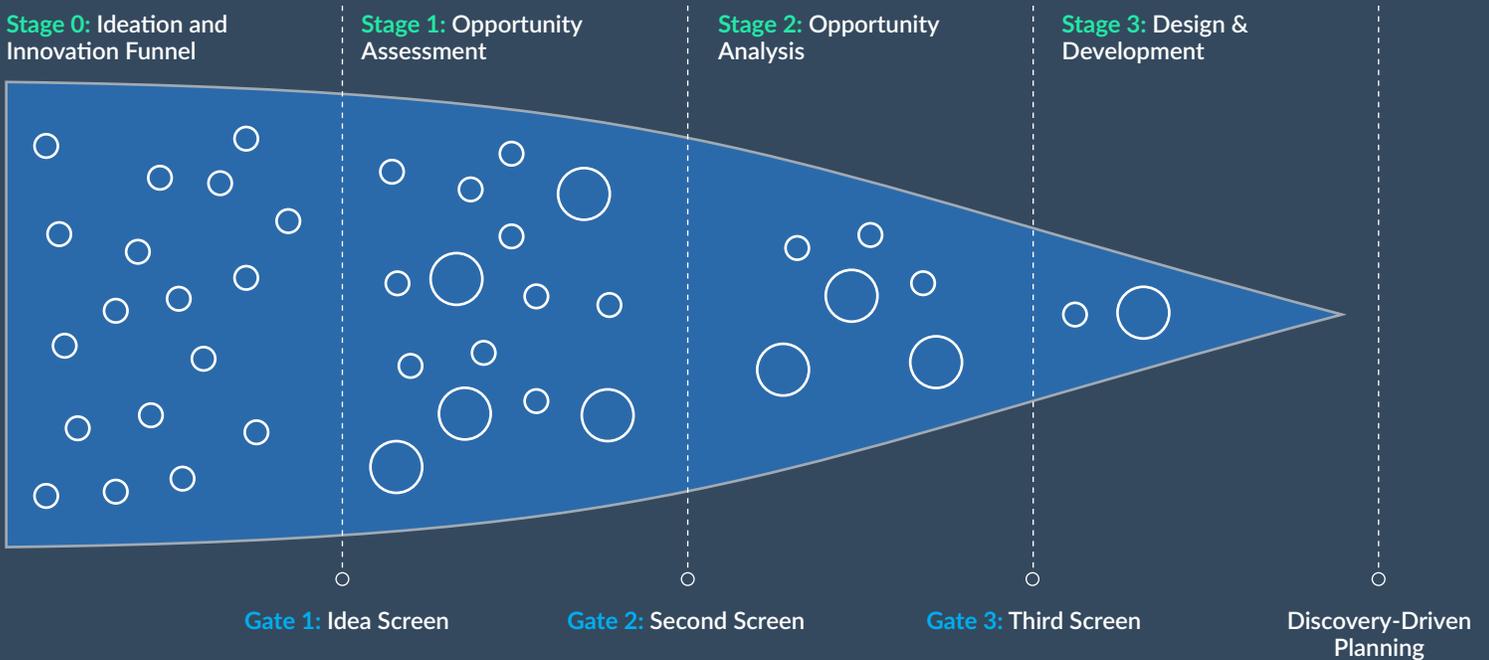
CREATE A RHYTHM

Whatever the ultimate mix, instilling discipline is critical. Ultimately, institutional leaders are rarely, if ever, presented with a full menu of innovation projects from which to choose at the same time. Ideas bubble up through a range of channels. The key is to collect these ideas, quickly evaluate and sort them into the different innovation buckets, and then, at disciplined checkpoints and following more analysis, compare like projects to like projects (e.g., it is not appropriate to compare transformational ideas to core innovations, as they

have completely different risk profiles, potentials, and time horizons). Then, make decisions about whether to invest and adhere to the college's or university's aggregate project plan or adjust with a full understanding of the implications.

The process unfolds in several iterative stages, which we illustrate below with an example of how we have created and implemented the process with one college. Different institutions will vary in how they implement the basic process.

# THE INNOVATION FUNNEL



## 3 KEY RISKS OF THE INNOVATION FUNNEL

In the absence of a tool to help you manage

1.

Overcommit > execution halts

2.

Don't commit > paralysis

3.

Commit to the wrong mix > mismatch between projects and strategy



### **STAGE 0: IDEATION AND INNOVATION FUNNEL—CONTINUOUS COLLECTION OF IDEAS**

Ideas can and should come from on and off campus. Ideation platforms, brainstorming sessions on how to solve specific problems and discover opportunities, alumni feedback, landscape scans, and more can help to identify ideas with promise.

### **GATE 1: IDEA SCREEN**

From here, ideas are sorted quickly into the correct category based on the available information and then evaluated for appropriateness to the institution's goals and potential impact. The big question at this point is not whether this is something in which the school will definitely invest, but whether the idea is promising enough to invest more time in learning about the opportunity to determine if it is worth pursuing. Other possible outcomes are that the idea is rejected or put on hold for future consideration as circumstances change.

### **STAGE 1: OPPORTUNITY ASSESSMENT**

The goal is to do a relatively quick, inexpensive analysis and scope of the projects that passed through the idea screen, largely through desk research, over a period of no more than a few days or a week. Specifically, the institution is looking to define the potential impact of each project, the intended beneficiaries, and the potential risks, as well as to confirm what category the project should fall into and what resources it will consume.

## GATE 2: SECOND SCREEN

On a regular basis—monthly or quarterly—designated decision makers at the institution will come together to decide which ideas to advance and how much resources to allocate for the next stage of assessment. Here, the institution is making active comparison decisions to filter out certain ideas in favor of other ones to intentionally match its desired project mix. For a project to pass through this gate, not only should the idea match the school's priorities, potential for impact, and innovation portfolio better than other choices, the college or university should also begin to identify what contingencies the idea may create. Does it require alerting the institution's accreditor, for example? Also, at this stage, before allocating resources to a project, the school should make sure that it has assigned a project owner. If the project appears attractive but, for any number of reasons, the university cannot appoint someone to lead it, then it will likely make sense to hold the project for future consideration.

If the project is a core innovation with minimal risk and cost, this is typically the final stage as the idea moves directly to piloting or launch. If it is an adjacent or transformational innovation, passing this gate means that the idea will likely now undergo further methodical scrutiny of its opportunities, risks, and costs.

The way to know whether the idea can move on to piloting or launch at this stage is to assess how familiar the project is to the college or university. That is, if the project is familiar and proven, and the ratio of knowns to unknowns or assumptions in the plan is high, then the college or university can have faith in the plan's projected outcomes. Assuming they look desirable, it can move forward with implementation.

Specifically, an institution has to look to see if three conditions have been met before moving an idea straight into piloting or launch:

1. There is a plan that addresses all of the important details required for success, as well as a high degree of confidence that the assumptions being made are correct and those responsible for the implementation understand each important detail.
2. The plan makes as much sense to all members of the organization as it does to the person making the plan.
3. Outside forces—such as the reaction of the community and students, or the impact of other schools, programs, or technology—are reasonably stable and predictable.



## STAGE 2: OPPORTUNITY ANALYSIS

The goal of this stage is to do a deep dive into the adjacent or transformational ideas that have advanced. Because adjacent and transformational innovations carry more unknowns and risks, we recommend institutions complete a deeper analysis of the opportunity. Specifically, the institution is looking to expand understanding of the potential impact of each project, intended beneficiaries, and potential risks outlined in Stage 1. Additionally, an opportunity analysis consists of light financial modeling, market analyses, rough program and business planning, an institutional change management assessment, and strategy creation. This stage requires some investment of time (three to six weeks depending on the opportunity) and resources, but in doing so it manages risks and ensures the institution is pursuing the opportunities with the highest likelihood of success.

## GATE 3: THIRD SCREEN

On a quarterly or monthly basis, designated decision makers at the institution will come together to decide which opportunities to advance and how much resources to allocate to design and potentially pilot the initiative. Here, the institution is making active comparison decisions based on available resources and potential impact. For a project to pass through this gate, the central question that must be answered is, given the school's priorities, limited resources, potential for impact, risks and contingencies, team leadership, and the other projects on tap, do we think this idea merits further investment through initial design and prototyping? If the answer is yes, then the university should be sure that it can match the right team to support it before formally approving it to move forward to the next stage.



# TEAM SELECTION

Assembling the right team for any given project is key. Giving specific departments the autonomy to implement a project will make sense for certain projects that are more finite in the changes they are trying to implement—like core innovations—but will have limits when applied to something more transformational that requires changing a college or university’s processes or architecture. Similarly, putting together a huge team of members from across the university on a project that represents a more incremental improvement will just create needless bureaucracy, delays, and frustrations.

The trick is to diagnose the desired level of change. This will determine what type of team is necessary and ultimately who needs to be at the table. Fundamentally, there are four different types of teams: functional, lightweight, heavyweight, and autonomous.

**Functional teams**, in which people work solely with others from their department, are best suited to improving one component of a service or one step of a process. Colleges and universities should use functional teams, made up of faculty or staff members within the same department, to make changes that are not interdependent on other parts of the campus. These teams will likely make sense only for core innovations.

**Lightweight** teams work well when a group decides to make improvements that affect how another group does its job

and when the relationship between the groups is predictable. A coordinative or project manager shuttles back and forth between groups working on a task to ensure that the work fits together correctly. Colleges and universities should use lightweight teams to coordinate projects that implicate more than one department in predictable ways. Lightweight teams will make sense for some core and adjacent innovations.

**Heavyweight** teams are the best fit for those tasks requiring that both an organization’s components and the people responsible for them interact with one another in new ways that cannot be anticipated or specified in advance; in other words, the problem requires a new system architecture. A heavyweight team comprises members from a variety of groups in an organization who bring their expertise but not their loyalty to “how things have always been done.” One person with significant clout and authority to make decisions leads the team. Heavyweight teams will make sense for certain transformational projects, as well as some adjacent innovations.

**Autonomous** teams are essential for tackling projects that will serve new markets and never-before served students, as well as for creating disruptive innovations—in other words, for transformational projects. They allow innovators to step outside of the existing context—including staffing, budget, facilities, and curriculum design—to pioneer a new model based on a new benefit, such as access or affordability.

TYPE OF INNOVATION



TEAM SELECTION



Embedded Within boundaries



Diverse Across boundaries

**STAGE 3: DESIGN AND DEVELOPMENT**

The goal of this stage is to prototype and design low-cost pilots (where applicable) that will quickly assess the strengths, weaknesses, and overall viability of the opportunity in real-world settings. Institutions should take an iterative approach to new opportunities. Resisting a full public rollout or commitment and providing time to assess impact allows for further iteration. This is important not only because it manages risk, but it also provides institutional leaders time to work through a thorough change management process. If institutions jump too quickly to commit fully to new innovations that fail, it can lead to loss of public faith. By providing a space for pilots and incubation of new opportunities, institutions are providing a safe space for failure with limited impact, which is critical to creating a truly innovative institution.

The first step is to flesh out the preliminary design for the project a bit more. That means developing an operational plan and timeline, a firm hypothesis for the outcomes and what success and failure is for the initiative, a list of required resources, and so forth. The college or university can have the designated team design the project in concert with the appropriate mix of internal and external people to get the initial design in a solid place.

From here, given that the institution is attempting something radically different from anything it has done before and it feels unpredictable with a low ratio of knowledge to hypotheses—transformational innovations, for example, often fall into this category—then it needs to follow a very different process from the one that core projects are following. The standard planning process won't work because the assumptions, both implicit and explicit, on which the projected outcomes rest are often wrong. The key to success will, instead, often be the ability to test hypotheses and continue to iterate on plans as the school gains more information during what is known as discovery-driven planning, a process initially developed by Rita Gunther McGrath at the Columbia Business School and Ian C. MacMillan at the Wharton School.

A discovery-driven planning process follows these four steps:

- Step 1:** List desired outcomes.
- Step 2:** Determine what assumptions must prove true for outcomes to be realized.
- Step 3:** Implement a plan to learn whether the critical assumptions are reasonable.
- Step 4:** Implement the strategy when key assumptions prove true.

The earlier stages and gates follow the outlines of a discovery-driven process for the initial approval of ideas. For all transformational projects and some adjacent ones, an institution will continue to follow this process, but now the process will proceed based on each project's own timeline. Decisions will not be made in the meetings about the broader set of ideas an institution is considering. Instead, they will be made at meetings solely devoted to the project that an institution has been piloting.



## START WITH THE OUTCOMES

If everybody knows what the outcomes must look like for the innovation to be worthwhile, then there is no sense in playing a game of Texas Hold 'Em. Everybody should lay the cards out on the table at the outset. What does the final state of the innovation need to do? What is the institution trying to accomplish? And how will it know it has been successful? This was already done in the design and development stage, so the team should be ahead of the game.

## CREATE AN ASSUMPTIONS CHECKLIST

The second step is where the real work begins. With the desired goals and outcomes identified, the institution should compile an assumptions checklist. It will look at the designed plan and list all of the assumptions that must prove true in order for the desired outcomes to materialize.

It needs to be exhaustive in this stage. All of the assumptions made implicitly should be on the table, including the use of time and space, approval processes, regulatory and legal questions, space, staffing, curriculum, software, hardware, the budget, culture, and more. This process of listing assumptions should take a day or two, and it is time well spent. Sometimes the list of assumptions at this stage will number more than one hundred. This exercise is also a great way for a leader to learn where there is and isn't agreement within an organization, so the group should invite people who represent a variety of departments and perspectives to the table.

Once the team is done compiling all of the assumptions, the next job is to rank the assumptions from the most to the least crucial. We have found that having the same group of individuals ask two questions about each assumption is the best way to accomplish this. First, it should ask what could happen if the group is wrong about an assumption. In other words, which of these assumptions, if proved untrue, would most seriously derail the success of the project? Second, it should ask how confident the group is that each assumption is correct. A fun test of how confident people are is to see if they are willing to give up one year's salary if they are wrong. Perhaps they are willing to give up only one week's salary if they are wrong? Or maybe they aren't willing to bet any of their salary because they have no sense of whether the assumption is correct. From here, a group can prioritize which assumptions are the most crucial to the project's success and about which it has the least knowledge if it is correct. The institution will want to test these assumptions first.





### IMPLEMENT A PLAN TO LEARN MORE

With the prioritized assumptions checklist in hand, the next step is to implement a plan to test the validity of the assumptions. The institution should plan to check the most important assumptions first because those are the assumptions with the least confidence behind them that are also the most crucial to the project's success.

In the initial stages of planning, the tests should be as simple, inexpensive, and quick as possible. They should simply provide a sense—not a clear answer—about whether the most critical assumptions are reasonable. For example, it is a good idea to look at other schools that have implemented something similar to see whether the assumptions hold water before going too far. Reading the existing research, having early conversations with experts, or creating quick mock-ups or prototypes makes sense. A prototype is anything that helps communicate the idea of what the institution is doing, which can mean everything from mock-ups and models to simulations and role-playing experiences. It is often helpful to create what people call the “minimum viable product.” This means slapping together the simplest product or prototype that allows the testing of the salient assumptions as quickly as possible.

**IT IS A GOOD IDEA TO LOOK AT OTHER SCHOOLS THAT  
HAVE IMPLEMENTED SOMETHING SIMILAR TO SEE  
WHETHER THE ASSUMPTIONS HOLD WATER BEFORE  
GOING TOO FAR**

## MOVE FORWARD IF ASSUMPTIONS PROVE TRUE

The last step is to decide whether to follow through with implementing the strategy. The team should continue to set gates or checkpoints—specific dates when the tests of several of the assumptions should be completed—so that the team can come together and evaluate what it has learned. The period leading up to the first gate could last one month, for example.

Then, if its assumptions are proving true, it should move forward to the next gate. If they are not—as will more than likely be the case—the team has a few options. Perhaps it can tweak the plan to keep moving forward. Alternatively, there may need to be bigger adjustments. Or, perhaps the assumptions underlying the success of the plan are wildly unrealistic, and the plan just won't work. If this is the case, then there is an opportunity to shelve the plan before too much money has been invested and the stakes have become too high to abandon the idea. This is important in a setting where capital—financial and political—is a scarce resource.

If the institution decides to move forward at this stage of the process, it should not attempt to implement the plan all at once. The team should look at its assumptions again and brainstorm tests that are more comprehensive, precise, and perhaps more costly than the previous versions. The key is to keep tests as low-cost and quick as possible, but precise enough that the team will continually gain knowledge and progress toward a full implementation. Assumptions that weren't tested before might now be tested. The important thing is to not invest a lot of time

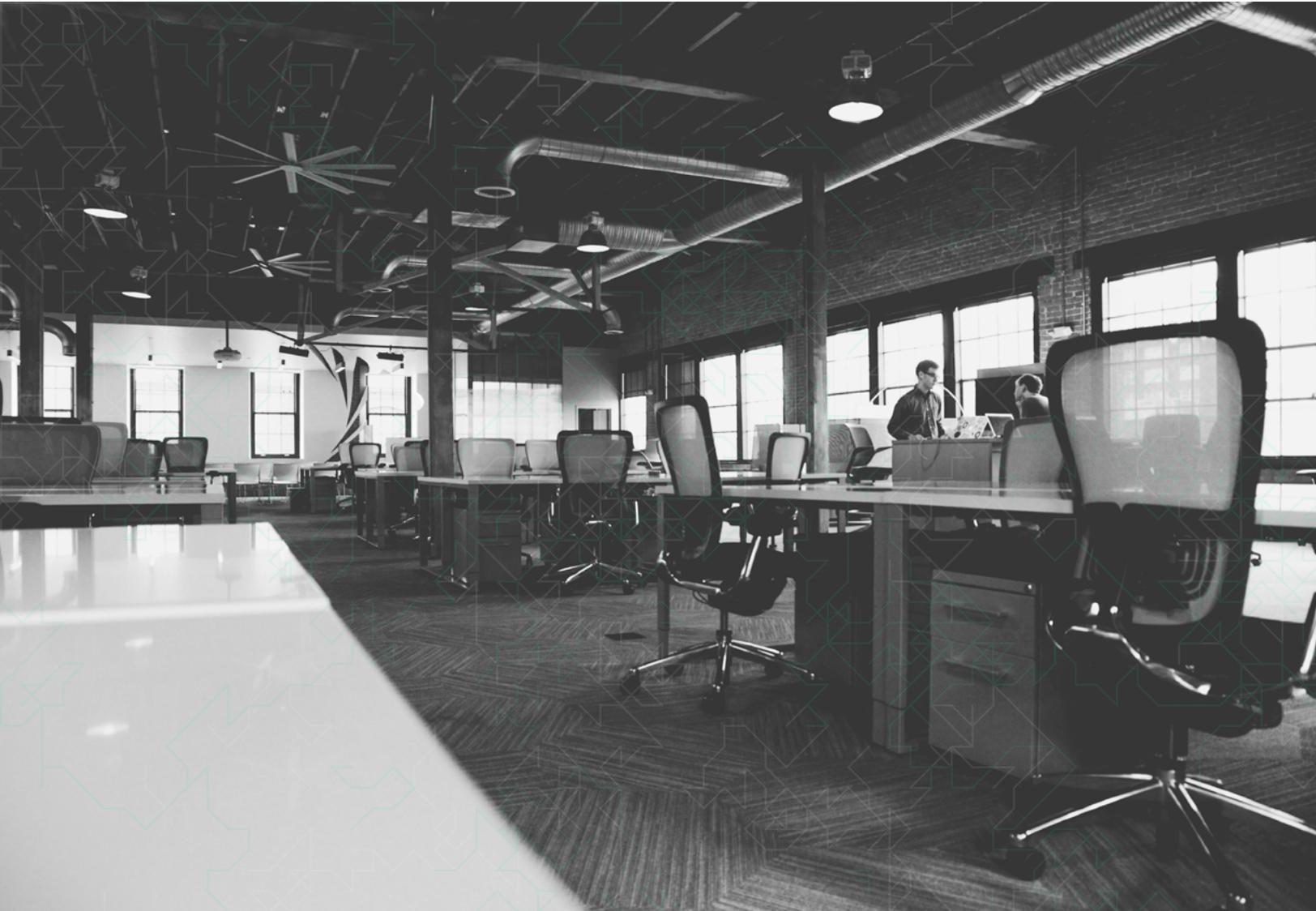
and resources early before knowing whether the assumptions are proving true—or at least are in the right ballpark.

Establishing a rhythm for the tests is critical. The team should set up more gates. Perhaps the second one will occur in another month and a third will be a month after that. Further down the line, a checkpoint might include a working prototype or a pilot of the innovation, followed by the full launch of the innovation.

At each gate, the team will gain new information. An assumption that seemed correct at a previous gate may be revealed to be more complex than it was originally thought to be. That's okay. And if the team learns that ultimately the assumptions are unrealistic and that it won't be able to pull off the project, it's not a reason for despair. Fast failure is a success. The team learned that the idea is not viable before wasting a lot of time and money implementing the plan. The key is to celebrate each time a decision is made. People should not feel that they have to defend a pet idea; the victory is in learning more about an assumption, not in proving that someone is right or wrong.

As the team makes adjustments and iterates, it may find that it is going down a path with assumptions that are proving true. The design of the plan that is emerging and gradually being implemented may differ from the one that was originally foreseen, but if it will be successful in realizing the desired outcomes, then that's a resounding victory—and the ultimate value of the discovery-driven process. It's a great way to avoid both the risk of innovating when students are involved and the risk of inaction.

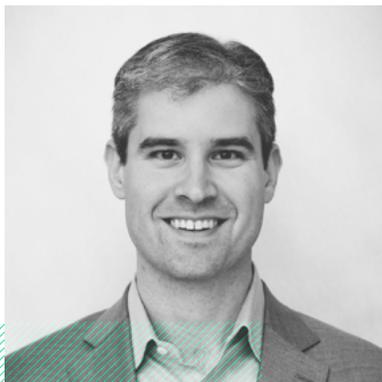




# CONCLUSION

Innovation is a difficult and unpredictable process. No one has the ability to see into the future and plan accordingly. But given the importance of innovating in higher education today, following a well-designed process for managing innovation can boost the odds of success and mitigate the risks. That means an institution needs to start with clear goals and an understanding of the gaps; build a strategy; implement a portfolio approach to innovation that matches the institution's strategy; put the right team in place to execute on the projects in which it decides to invest; and follow a discovery-driven path that is nimble so that the school can *learn* through fast trial and error without expending too much capital, *maneuver* into an ideal position, and *chart* a winning course to success. Following this path isn't easy of course, but the rewards—in terms of impact—are worth the journey.

# AUTHOR BIOGRAPHIES



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Michael Horn is a Senior Partner at Entangled Solutions. He is also the co-founder of and a distinguished fellow at the Clayton Christensen Institute for Disruptive Innovation, a nonprofit think tank. Michael is the author of the award-winning book, "Disrupting Class: How Disruptive Innovation Will Change the Way the World Learns" and the Amazon bestseller, "Blended: Using Disruptive Innovation to Improve Schools".

Michael serves on the board and advisory boards of a range of education organizations, including the Clayton Christensen Institute, the Robin Hood Learning+Tech Fund, and the LearnLaunch Institute. He also serves as an executive editor at Education Next and is a venture partner at NextGen Venture Partners.

He was selected as a 2014 Eisenhower Fellow to study innovation in education in Vietnam and Korea, and Tech & Learning magazine named him to its list of the 100 most important people in the creation and advancement of the use of technology in education. He holds a B.A. in history from Yale University and an M.B.A. from the Harvard Business School.



**TERAH CREWS**

Terah Crews is a Partner at Entangled Solutions. Terah has been in education for 13 years, having started in youth and student services, research, and teaching, before moving into a career in innovation and new program/venture development.

Immediately prior to joining Entangled, Terah led business development for Sixup, a fintech/edtech platform that partners with schools to help low-income students pay for and graduate from college. Prior to Sixup, Terah spent four years at Arizona State University. While there, she served the Office of the President and the CEO of the ASU Foundation through designing and building innovative new programs and revenue streams, including a public service academy, a defense contractor, an edtech accelerator she co-founded, and a new corporate structure for the university's foundation.

A former high school dropout and first generation student turned alumna of UNC-Chapel Hill (undergraduate), Brown, and Harvard (graduate), Terah is passionate about the individual, social, and economic impact of education.



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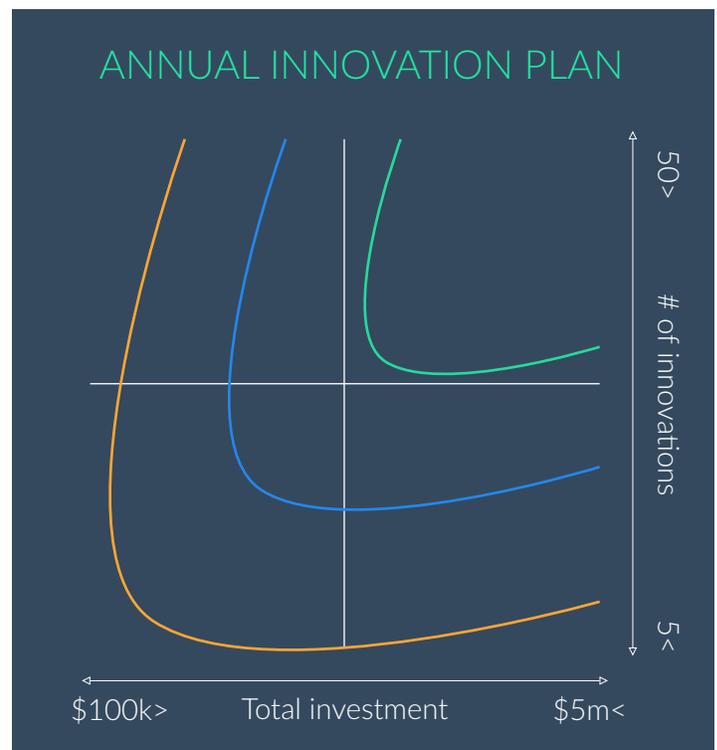
# HOW TO GET STARTED?

The first step in implementing an innovation management system on your campus is to assess where you are in this process and to figure out the right implementation for your situation.

Some colleges and universities may need to spend time establishing clear goals and calculating how far they are from realizing them. Other colleges and universities may already have clear goals and an understanding of their gaps, but need to build a coherent and widely accepted strategy. Still others will already have a strategy in place but need to implement a process and portfolio approach around innovation to execute on that strategy.

If you are in this last stage, we recommend plotting your campus' planned investment in innovation onto a simple matrix. If you plan to invest a significant sum amount in innovation efforts and you will be launching many innovations, you fall in the **green** section of the graphic. We recommend a customized system for managing this portfolio of innovations that takes into account your campus' unique culture and governance structure. The creation of a customized process also provides an opportunity to engage the larger campus community in thinking about what innovation means for your institution.

If your budget for innovation and goal for the number of innovations falls in the **blue** section, you might consider a more pared down implementation. Fully customized plans are only necessary when the number of innovations and projected budget and investment are high. Have a large budget, but only plan to focus on a few things? Want to do a lot of small innovations on a small total budget? Consider a



quick innovation health check and training for leaders on how to use the innovation process described in this paper.

If your institution falls in the **orange** section, you may not need an innovation management system at this time. Monitor how your budget and the number of innovations grow over time though to ensure you implement a system when the need arises.

**Need assistance creating clear goals or a strategic plan? Not sure where you fit in the matrix or whether your campus needs a custom innovation management system?**

Entangled is happy to set up a quick phone call to talk about your institution's unique situation. Contact us at [innovation@entangled.solutions](mailto:innovation@entangled.solutions) to talk to one of our coauthors.

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