



Toolbox

UNLOCKING POTENTIAL – HOW TO MAKE INNOVATION SOCIAL?



Interreg
Baltic Sea Region



**Co-funded by
the European Union**



RESPONSIVE PUBLIC SERVICES

RESIST

This toolbox is prepared as part of the project **Regional Ecosystems for Social Innovation and Social Transformation** (RESIST).

Disclaimer: The European Commission support to produce this publication does not constitute endorsement of the contents which reflects the views only of the authors, and the Commission cannot be held responsible for any use which may be made of the information contained therein.

The RESIST project is co-financed by the European Union (European Regional Development Fund) under the Interreg Baltic Sea Region Programme.

Toolbox & Textbook

UNLOCKING POTENTIAL – HOW TO MAKE INNOVATION SOCIAL?

Introduction

Welcome to the Toolbox, a practical companion designed to work seamlessly with the accompanying Textbook, which lays the foundational theory covering topics such as Social Entrepreneurship (SE) and Social Innovation (SI). The Textbook provides essential background information and explores how innovation facilitators can open up to these themes and actors effectively.

As you delve into this Toolbox, you will find a **series of tools and methodologies** aimed at exploring what your organization currently does for SE/SI and brainstorming new services that could enhance your support for these crucial areas. Each tool within this Toolbox is intended to not only stand alone but also to synergistically complement the Textbook.

Throughout the Toolbox, references are made to specific chapters of the Textbook that will serve as a valuable information base for each phase of your exploration. This **cross-referencing** is designed to enrich your understanding and application of the tools provided here, enabling a comprehensive approach to fostering social innovation within your organization.

Whether used independently or as a pair, the Textbook and Toolbox together provide a robust **framework for organizations looking to deepen their impact in the field of social entrepreneurship and innovation.**

Structure of the Complementary Textbook

Chapter 1

UNDERSTANDING THE BASICS

Chapter 2

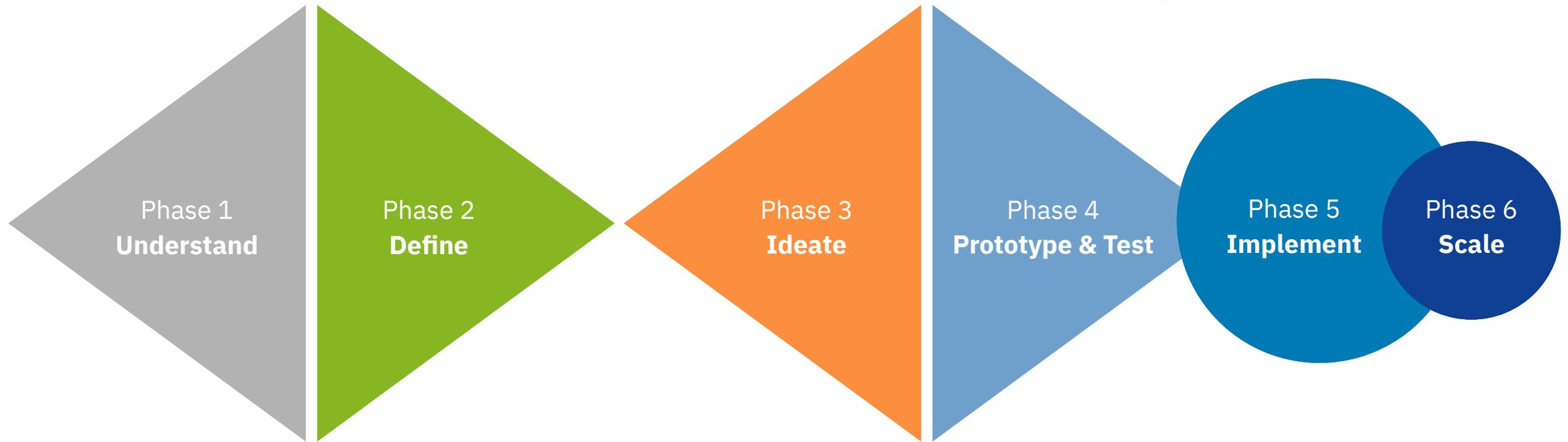
THE STRATEGIC ADVANTAGE OF
EMBRACING SOCIAL INNOVATION

Chapter 3

APPROACHES TO EMPOWER
SOCIAL INNOVATORS

Chapter 4

COLLABORATING ACROSS THE
SOCIAL INNOVATION SUPPORT
ECOSYSTEM



How to use the Toolbox:

Start by identifying where you are in your journey. Next, **explore the tools provided** for each phase and their brief descriptions. Then, **choose the ones that best match your needs and goals**. Each tool is crafted to guide you through essential steps, from grasping core concepts to scaling your impact.

Why do we use that structure?

We use this structure because it provides a step-by-step framework for navigating complexity. It empowers you to think big while working small, using a human-centered approach to ensure that your solutions are not only innovative but also grounded in real-world needs and realities.

Phase 1

Understand

Description

The goal of this phase is to give you a general understanding of the concepts of Social Innovation and Social Entrepreneurship, how they are interconnected and why it is important to open up existing structures to these approaches.

List of methods

- Definitions
- Podcast

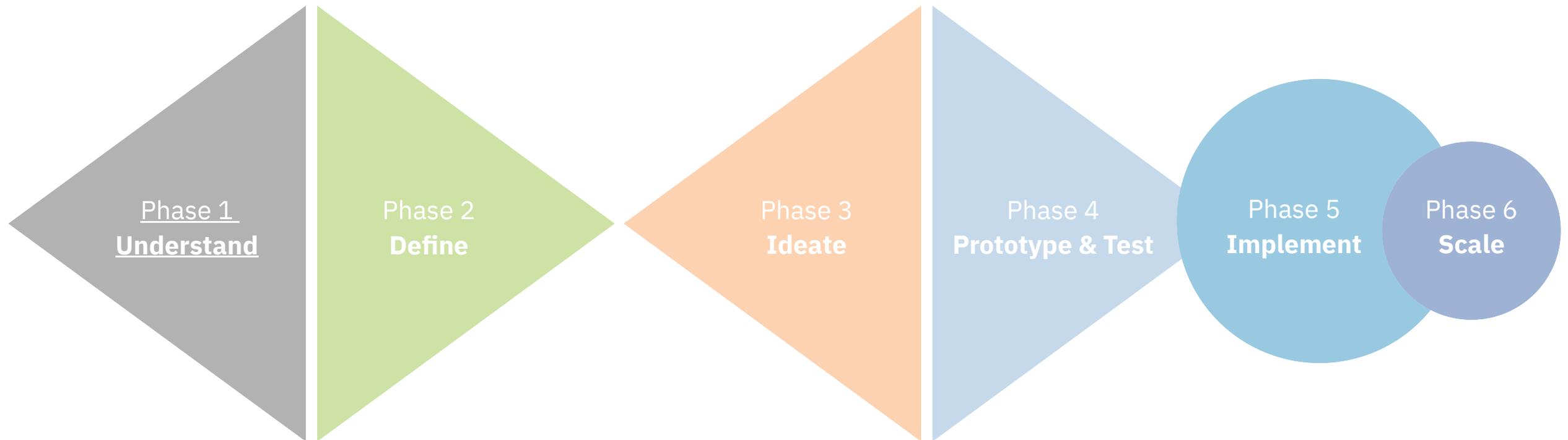
Background Knowledge

*Chapter 1 & 2 of the Guide
"Unlocking Potential – How to Make
Innovation Social"*

Toolbox

HOW TO MAKE INNOVATION SOCIAL?

Structure



Phase 1 | Understand

Definitions

Introduction

Description

After reading into some definitions and examples in chapter 1 of the Guide "Unlocking Potential – How to Make Innovation Social", gathering in a Definitions Workshop helps to bring together different perspectives and visions of what social innovation and social entrepreneurship means for your organisation/team/project.

Method Key Facts

Format

Workshop

Number of Participants

min. 3, max 10 people

Who to involve

Team members

Duration

1-2 h

Preparation & Setting

By this point you should have read the chapter 1 of the Guide "Unlocking Potential – How to Make Innovation Social"

Phase 1 | Understand

Definitions

Steps

1. **Individual definitions:** Write down individually how you define what Social Innovation and Social Entrepreneurship mean **in the context of your organisation/team/project?**
2. **Dot vote:** Read each others post-its and vote:
 - on the most unexpected definition;
 - the one that you find is the most relevant in your context;
 - the one that you have a question about (Learn more);
3. **Discuss** the "Learn more" ideas.

Phase 1 | Understand

Definitions

Template

Define what Social Innovation and Social Entrepreneurship mean in the context of your organisation/team/project?

Example: new ideas and solutions that meet social needs		

Dot Voting

- Unexpected
- Relevant
- Learn more

Phase 1 | Understand

Podcast

Introduction

Description

For those seeking a structured yet time-efficient way to explore the key concepts of social innovation, the podcast "**Unlocking Potential – How to Make Innovation Social**" serves as an accessible introduction to the themes covered in the comprehensive guide.

Method Key Facts

Format

Audio

Duration

20 Minutes

Link

[Unlocking Potential – How to Make Innovation Social Podcast](#)

Phase 2

Define

Description

This phase starts based on a solid knowledge base of Social Innovation and Entrepreneurship. Now you want to understand how these models and concepts are connected to your specific organisation and how they could be integrated more in your support activities. The methods help you explore what you are doing already, what would happen if you didn't open up at all and how your activities and organisation could look like in the future. The following step will be the creation of ideas for adjusted and/or new services in Phase 3 "Ideate".

List of methods

- **Status Quo Mapping:** Analyse existing support activities
- **Service Check-up:** What kind of Cases / Clients are we supporting so far?
- **Is it a match?** Check if you are meeting SE needs already
- **Scenario Session:** What happens if we do nothing?
- **Utopian Charge:** Creating atmosphere for creative thinking
- **Future Mapping:** Sketching Desirable Futures

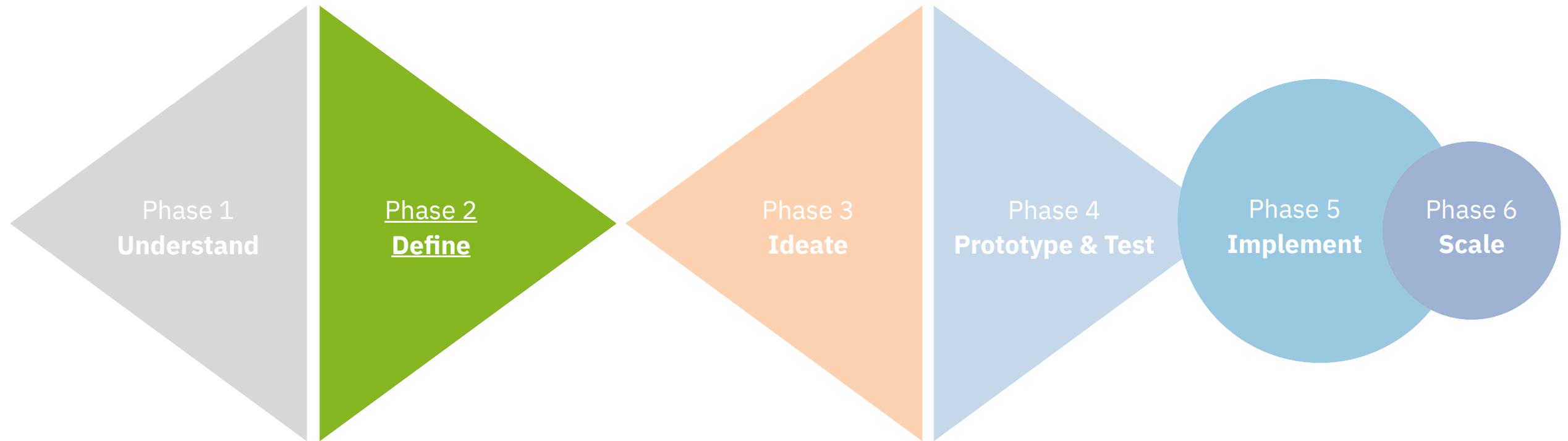
Background Knowledge

*Chapter 1, 2 &3 of the Guide
"Unlocking Potential – How to Make
Innovation Social"*

Toolbox

HOW TO MAKE INNOVATION SOCIAL?

Structure



Phase 2 | Define

Status Quo Mapping

Introduction

Description

Mapping the status quo of an organisation's entrepreneurship and innovation offerings is a useful process to analyse existing resources, programmes and services. The next steps can build on this to evaluate where there are points of contact for social entrepreneurs, where there may be barriers to entry and where suitable services need to be added.

Method Key Facts

Format

Workshop and/or desktop activity

Number of Participants

2-8 People, it is also possible to work alone and/or decentralised

Who to involve

Employees of the organisation who work in programmes to promote entrepreneurship and innovation (e.g. project managers, programme managers, marketing, finance).

Duration

2-4 h, could be split into two separate sessions

Preparation & Setting

Each participant could prepare with listing existing offers and services for fostering innovation and supporting entrepreneurs to gain a first overview. Prepare all the material needed for the collection and the mapping. Prepare a suitable physical or digital room setting for the group work and discussion e.g. a large table covered in paper or a brown paper on the wall.

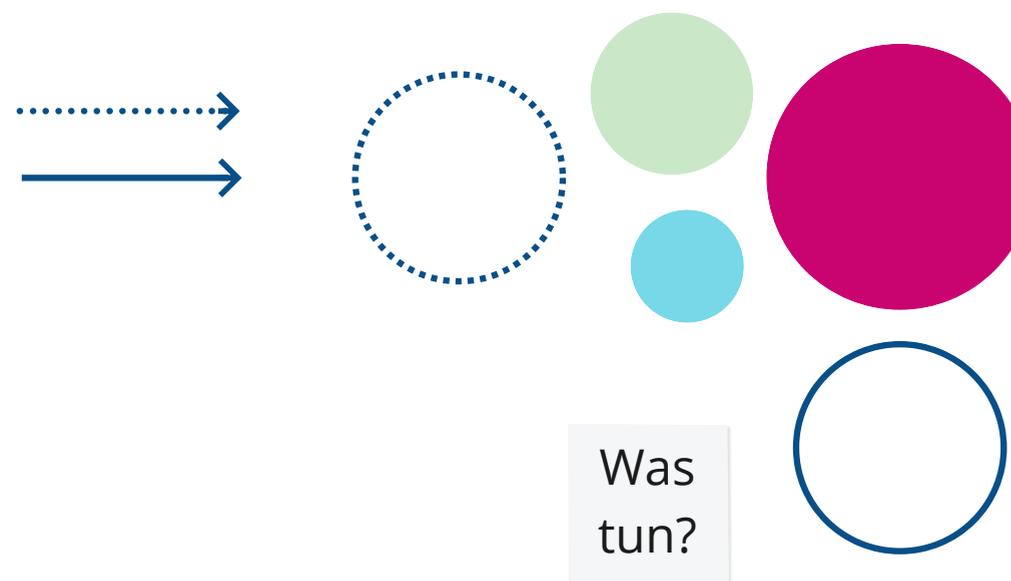
Phase 2 | Define

Status Quo Mapping

Steps

1. **Clarify objectives and scope:** Clearly communicate that you are conducting this mapping for revealing potentials for SI/SE support activities. Which offers and services should be analysed? Should the mapping cover specific departments, programmes or all activities of the organisation?
2. **Collecting offers:** Collect all programmes, services, resources and partners that the organisation offers as part of its innovation and funding activities on (virtual or analogue) sticky notes.
3. **Map support system:** Work on the visual representation of offerings and resources. This could include programmes, services, funding opportunities, networks and partnerships. Present their correlations, overlaps, synergies and gaps. You can also depict connections to services of other organisations.
4. **Mark services for SI/SE:** Take a closer look on your service system and try to figure out which of the services are already open to Social Entrepreneurs and/or other actors in this field. Where might be barriers? Where might be gaps?

Phase 2 | Define Status Quo Mapping Template



Phase 2 | Define

Service Check-up

Introduction

Description

The "Service Check-up" method is a structured approach to analyze and assess the types of cases or clients that an organization has been supporting. This technique helps to categorize and evaluate the client base to better understand the proportion of social innovation and social entrepreneurship (SI/SE) within the supported groups. It also aids in setting specific, measurable, achievable, relevant, and time-bound (SMART) goals for future client support strategies.

Method Key Facts

Format

Workshop

Number of Participants

min. 3, max 10 people

Who to involve

Every important stakeholder should be represented by one participant in a workshop setting. If that's not applicable the task could also be fulfilled in a decentralised format.

Duration

2-4 h, could be split into two separate sessions

Preparation & Setting

Prepare Step 1 "Map Existing Clients" beforehand. This could be done by all team members or participants collectively in a shared list or by one designated team member with the necessary expertise and knowledge. Prepare all the material needed for the clustering, the analysis and the goal setting. Prepare a suitable physical or digital room setting for the work and discussion in the full group and in pairs.

Phase 2 | Define Service Check-up Steps

1. **Map Existing Clients:** Start by collecting data on all current clients or cases. Organize this information into a comprehensive list or database to create a clear overview of whom you are currently serving.
2. **Cluster and Find Similarities:** Group clients or cases with similar characteristics together. This could be based on the nature of their businesses, the challenges they face, the type of support they require, or other relevant factors.
3. **Understand and Discuss Key Characteristics:** With your team, discuss the key characteristics of each cluster. Consider adding more distinguishing features or notes that could help in deeper analysis.
4. **Case Selection:** Assign 1-3 cases to each pair of team members. This smaller focus allows for a more detailed and manageable analysis.
5. **Analyse Selected Cases:** Evaluate whether the selected cases qualify as social innovation or social entrepreneurship (SI/SE). Use predefined criteria to make this determination.
6. **Estimate SI/SE Proportion:** Gather insights from the analysis and collectively estimate what percentage of your current client base falls under SI/SE.
7. **Set a SMART Goal:** Based on the findings, set a SMART goal for the proportion of SI/SE clients you aim to support going forward. Ensure that the goal is specific, measurable, achievable, relevant, and time-bound.

Phase 2 | Define

Scenario Session

Introduction

Description

The "Scenario Session" method is used to explore the potential consequences of inaction within an organization, helping to visualize the impact of current challenges or trends if no measures are taken. This method encourages participants to think critically about the organization's future under different scenarios, providing a structured framework for strategic planning.

Method Key Facts

Format

Workshop

Number of Participants

min. 3, max 10 people

Who to involve

Every important stakeholder should be represented by one participant in a workshop setting. If that's not applicable the task could also be fulfilled in a decentralised format.

Duration

2-6 h, could be split into two separate sessions

Preparation & Setting

Prepare all the material needed for the different steps. This includes large papers and sticky notes. Prepare a suitable physical or digital room setting for the work and discussion in the full group and if necessary also in several smaller groups.

Phase 2 | Define Scenario Session Steps

1. **Introduction and Objective Setting:** Begin by clarifying the session's goal: to understand the consequences of inaction. Briefly describe the current challenges, goals, or opportunities facing the organization to set the context.
2. **Current Situation Overview:** Review the organization's or project's current state, emphasizing key challenges, vulnerabilities, or trends. Together, define what "doing nothing" would look like, ensuring everyone understands the concept of inaction in this context.
3. **Brainstorming Possible Consequences:** Conduct a silent brainstorming where participants individually note potential consequences of inaction. Share and cluster these consequences in small groups or with the full team to identify major themes or impact areas.
4. **Scenario Exploration:** Develop a timeline of consequences, arranging them into short-, medium-, and long-term impacts. Construct narratives for each period, detailing the consequences and possible trigger events that could intensify the effects.
5. **Reflection and Discussion:** Discuss the most likely and worst-case outcomes to assess what the organization risks losing or facing if no action is taken. Identify critical tipping points where consequences might become especially severe.
6. **Wrap-Up and Next Steps:** Summarize the major insights and risks identified during the session. Encourage participants to jot down initial ideas for action to address or mitigate the main risks. Decide on follow-up actions, such as scheduling another session or drafting a report to summarize the findings.

Description

"Is it a match?!" is an exploratory method designed to evaluate whether your organization is currently meeting the needs of social entrepreneurs (SocEnts). By using both real and fictional example cards that depict various social enterprises, participants can deepen their understanding of SocEnt needs and adjust services accordingly. This method encourages creative thinking and collaborative discussion to identify service alignment and gaps, helping to refine organizational offerings to better support the social entrepreneurship sector.

Method Key Facts

Format

Workshop

Number of Participants

min. 3, max 10 people

Who to involve

Every important stakeholder should be represented by one participant in a workshop setting. If that's not applicable the task could also be fulfilled in a decentralised format.

Duration

2-4 h, could be split into two separate sessions

Preparation & Setting

There are some example cards given, but you might want to add more cards that are more specific or better related to your context/region – if so, prepare the cards beforehand. Prepare the cards for handing them out – physically or digitally. Prepare a canvas for the needs analysis. Prepare a suitable physical or digital room setting for the individual and group work and discussion.

1. **Pull a SocEnt Card:** Begin the session by selecting a card from the deck that describes a social enterprise. This card includes basic information about the enterprise's mission, current challenges, and goals.
2. **Explore the Case:** Use your imagination to expand upon the information given on the card. Consider the possible market, operational challenges, or unique opportunities that the described SocEnt might encounter.
3. **Present the Case:** Each participant or group presents their expanded case to the rest of the attendees, providing a comprehensive view of the potential SocEnt's context and needs.
4. **Group Discussion:** Engage in a group discussion to determine how your organization could support the presented SocEnts. Consider whether the support aligns with your organizational capabilities and goals. Discuss if this is a type of SocEnt you would want to support.
5. **Needs Analysis Matrix:** For needs identified during the discussion that your organization cannot currently meet, use a matrix to categorize them based on whether you can or cannot meet these needs and whether you want to or do not want to meet them. This helps in prioritizing service development and strategic alignment.

Phase 2 | Define

Is it a match?!

Template (Example Cards)

GreenBitez

<p style="text-align: center;">Summary</p> <p>GreenBitez focuses on promoting sustainable nutrition in primary schools to provide children with access to healthy meals, improve awareness of nutrition, and enhance concentration.</p>	<p style="text-align: center;">Goals</p> <ol style="list-style-type: none"> 1. Completion and testing of the prototype. 2. Establishing partnerships with schools and municipalities. 3. Securing seed funding and grants. 	<p style="text-align: center;">Needs</p> <ol style="list-style-type: none"> 1. Incubation programs for concept development. 2. Funding for prototypes and market tests. 3. Access to networks with educational institutions. 4. Mentorship in business model development and impact measurement. 	<p style="text-align: center;">Barriers</p> <ol style="list-style-type: none"> 1. Difficulty in attracting forging partnerships without a pilot project. 2. Limited resources for prototype development and market research.
<p style="text-align: center;">Status</p> <p>The concept is currently under development. Initial discussions with schools and parents indicate strong interest, and a prototype for a nutrition education app is in progress.</p>			

Template:

RecycleAware

<p style="text-align: center;">Summary</p> <p>RecycleAware offers recycling workshops to raise community awareness about sustainable waste management. The goal is to increase recycling rates and reduce environmental impact.</p>	<p style="text-align: center;">Goals</p> <ol style="list-style-type: none"> 1. Expanding the offering to more municipalities. 2. Optimizing workshop concepts based on feedback. 3. Scaling marketing activities. 	<p style="text-align: center;">Needs</p> <ol style="list-style-type: none"> 1. Acceleration programs for strategic scaling. 2. Funding for operational resources and marketing. 3. Stronger networks with environmental organizations. 4. Consulting on legal form formalization. 	<p style="text-align: center;">Barriers</p> <ol style="list-style-type: none"> 1. Increased operational costs due to scaling. 2. Difficulty in establishing long-term partnerships with new municipalities.
<p style="text-align: center;">Status</p> <p>The business model has been successfully tested in three municipalities. Initial revenue is being generated, and interest in additional workshops is growing.</p>			

Enterprise's Name

<p style="text-align: center;">Summary</p>	<p style="text-align: center;">Goals</p>	<p style="text-align: center;">Needs</p>	<p style="text-align: center;">Barriers</p>
<p style="text-align: center;">Status</p>			

AccessWow

<p style="text-align: center;">Summary</p> <p>AccessWow develops accessible software solutions for people with disabilities to promote digital inclusion and equal opportunities.</p>	<p style="text-align: center;">Goals</p> <ol style="list-style-type: none"> 1. Extending services to additional federal states. 2. Developing new software modules for specific disability groups. 3. Establishing itself as a leading provider of digital accessibility solutions. 	<p style="text-align: center;">Needs</p> <ol style="list-style-type: none"> 1. Funding for expansion and further development. 2. Support for internationalization and product adaptation. 3. Advocacy for digital accessibility at the policy level. 4. Impact measurement and optimization of scaling strategies. 	<p style="text-align: center;">Barriers</p> <ol style="list-style-type: none"> 1. High investment required for technological advancements. 2. Complex legal and data protection requirements in new markets. 3. Shortage of skilled professionals with specialized expertise.
<p style="text-align: center;">Status</p> <p>The enterprise operates in multiple cities, generates stable revenue, and is supported by various partner organizations. National expansion is the next step.</p>			

Phase 2 | Define

Is it a match?!

Template (Matrix)



Can we currently meet the Social Enterprise's needs?

currently meeting the needs + no more action/adjustment needed for the future

currently meeting the needs + action/adjustment needed for the future

currently not meeting the needs + no more action/adjustment needed for the future

currently not meeting the needs + action/adjustment needed for the future

Do we want to meet the Social Enterprise's needs in the future?

Phase 2 | Define

Utopian Charge

Introduction

Description

The "Utopian Charge" method is an interactive and dynamic brainstorming technique designed to explore and expand the utopian potential within any project, meeting, or scenario. By harnessing rapid, improvisational thinking, groups can unlock innovative and visionary ideas quickly and collaboratively. It creates an atmosphere of rather positive, creative thinking.

The method has been taken from this web page, it was developed by the organizational developer Lino Zeddies:

<https://realutopien.info/toolbox/utopian-charge/>

Method Key Facts

Format

Short introduction

Number of Participants

min. 2 people

Who to involve

Every person participating in the workshop

Duration

10m

Preparation & Setting

Circular seating arrangement, if possible

Phase 2 | Define Utopian Charge Steps

1. **Initiate with a Potential-Seeking Question:** Start the session by posing a question focused on discovering the greatest utopian potential of the subject at hand (e.g., "What is the greatest utopian potential of our meeting?").
2. **Rapid Ideation:** Participants quickly throw out answers and build on each other's ideas without pausing to critique, starting each addition with "Yes, and..." to maintain an energetic and constructive flow.
3. **Build on Ideas:** Continue the fast-paced discussion, allowing ideas to grow and expand upon each other, exploring all possible positive outcomes and visionary scenarios.
4. **Conclude When Saturated:** End the session once the group feels that the ideas have fully developed and no new insights are emerging.

Phase 2 | Define Utopian Charge Example

To understand better, how the method works, this example session, created by ChatGPT, might help:

Question: "What's the highest utopian potential of Social Entrepreneurship?"

1. **First Idea:** "Social entrepreneurship could completely eliminate poverty by innovatively addressing basic needs access for everyone!"
2. **Second Idea (building on the first):** "Yes, and it could lead to universal education systems where everyone, regardless of background, has access to top-tier learning resources!"
3. **Third Idea:** "Yes, and these initiatives could spark a global movement where social entrepreneurs are working with politicians in shaping public policy!"
4. **Fourth Idea:** "Yes, and it could transform traditional business models, leading to a widespread adoption of ethical practices that prioritize community well-being over profits!"
5. **Fifth Idea:** "Yes, and imagine if this shift triggered a global renaissance of cooperative living and sustainable communities, completely reshaping urban development!"
6. ...
7. ...
- ...

Phase 2 | Define

Future Image

Introduction

Description

The "Future Image" method is a co-creative group session designed to craft a vivid image or metaphor of your organization's future. This exercise helps in envisioning a desirable and connective vision that guides the next steps in service creation, particularly within the context of supporting social entrepreneurs and social innovation.

Method Key Facts

Format

Workshop

Number of Participants

min. 3 people, split into smaller groups if there's more than 4 people participating

Who to involve

Every person (potentially) concerned with innovation support in your organisation.

Duration

2-6 h, could be split into two separate sessions

Preparation & Setting

space four a circular setting and 1 group table per 3-4 people, make sure you have a good acoustic setting in which several groups can work together

Phase 2 | Define Future Image Steps

1. **Utopian Charge Warm-up:** Start with a quick Utopian Charge to get everyone thinking creatively about the future possibilities of the organization.
2. **Group Imaginary Round:** If the group is large, split into smaller groups of 3-4 people. Close your eyes and imagine waking up a few years in the future and going to work: What does the daily business look like? How integral is the support of social entrepreneurs and social innovation now?
3. **Individual Reflection:** Take 5 minutes to write down thoughts on the future role, the feel of the workplace, interactions with colleagues, and potential support actions for entrepreneurs without current limitations.
4. **Sharing and Discussion:** Share your visions in a quick round, giving each person 1-2 minutes to speak. Discuss similarities and differences in your stories and work to synthesize these into a coherent scenario.
5. **Metaphor Creation:** Develop a metaphor that encapsulates your future organization or service. Discuss elements like the nature of support provided, the stakeholders involved, and the overall aesthetic or theme.
6. **Sketch and Presentation:** Sketch the metaphor on a large paper, annotating it with descriptive words that encapsulate the group's vision. Present the results to other groups, explaining the metaphor and the envisioned future dynamics.

Phase 3

Ideate

Description

This phase is about generating ideas on how SI/SE support services could look for your organization. The methods will help you to get creative and find the right approaches for support in your region. The first step is to collect rough ideas, then prioritize them and decide whether to pursue them further. Those that make it to the next round enter a feedback process. Goal is to start into the next phase with 1-2 approaches on how your organization can support SI/SE.

List of methods

- Ideation
- 2x2 Matrix
- Dot Vote
- I like, I wish, I wonder

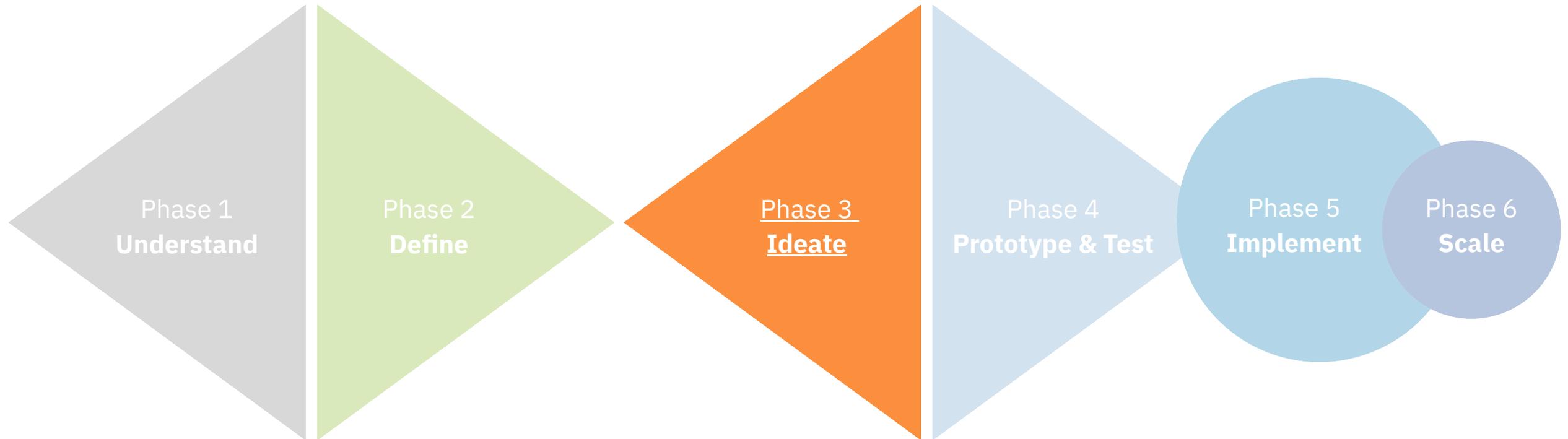
Background Knowledge

*Chapter 1, 2 & 3 of the Guide
"Unlocking Potential – How to Make
Innovation Social"*

Toolbox

HOW TO MAKE INNOVATION SOCIAL?

Structure



Description

In the ideation tool, we stimulate creativity and allow all participants, regardless of their hierarchical level, to contribute their ideas. With this method you can generate many ideas and get an interdisciplinary view and generate inspiration. The tool is a combination of the Ideologue, Brainstorming and Analogy methods.

Ideation rules:

1. We welcome all ideas
(quantity over quality)
2. We never criticise an idea
3. We don't interrupt others when they share their idea
4. We build on the ideas of others
5. We write down one idea per sticky note

Method Key Facts

Format

Workshop

Number of Participants

min. 4, max 12 people

Who to involve

Minimum: Team members and target group (Social Innovators or Entrepreneurs)

Additionally: Key stakeholders represented by one participant. For example financial institutions, NGOs, public authorities, science, private economy etc.

Duration

2-3h

Preparation & Setting

By this point you should have read the chapters 1, 2 & 3 of the Guide "Unlocking Potential – How to Make Innovation Social". Prepare a board for brainstorming and clustering ideas.

1. **Prepare:** Present a clear user story for which the ideas are to be developed, e.g. As a [persona], I [want to], [so that]. As a social innovator, I need support in scaling impact, securing funding, and building strong partnerships so that I can expand operations.
2. **Ideate in silence:** Ask the participants to write down their ideas on a paper or on the board in silence. (Time: 5-10 Minutes per user story)
3. **Brainstorm:** Form groups of 4-6 persons, repeat the rules, ask the participants to collect all ideas on a board, make sure that everyone is heard and all ideas are written down (Time: 10-15 Minutes per user story)
4. **Cluster:** Bring all participants back together. Someone starts sticking their ideas on a board and explaining them briefly. If there is already a similar post-it, add it next to it. During the explanations of the participants, new ideas should be generated and new post-its should be described. The result is a clustered board of ideas.
5. **Evaluate:** Use the **2x2 Matrix** to evaluate and prioritize the collected ideas.

Phase 3 | Ideate

2x2 Matrix – Prioritise

Introduction

Description

The 2x2 Matrix is a way of categorising and prioritising your ideas. The matrix is highly customisable thanks to the individual labelling of the axes. Possible axis labelling can be: Feasible, Cool, Valuable, Cost, Benefit, Effort, Impact and many others.

Method Key Facts

Format

Workshop

Number of Participants

min. 2, max. 8 people

Who to involve

Team members and target group
(Social Innovators or Entrepreneurs)

Duration

30 minutes – 1 hour

Preparation & Setting

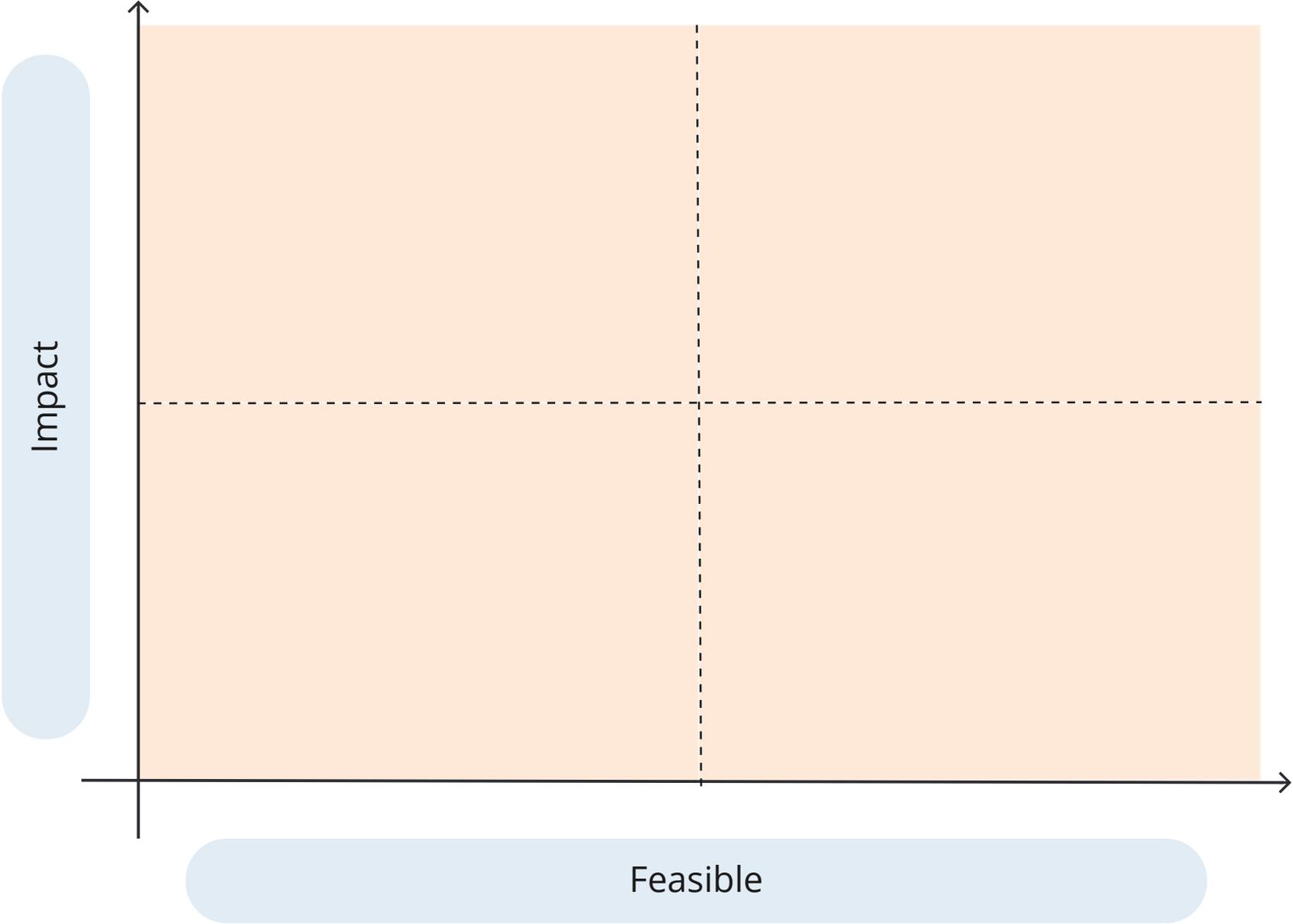
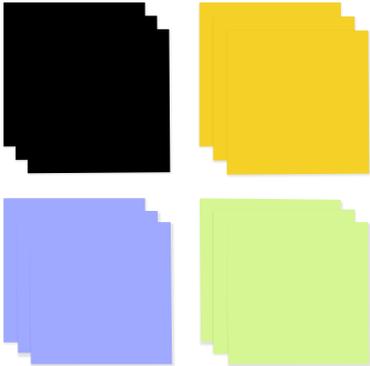
Completed Ideation Session

1. **Categorize:** Ask for each idea in which quadrant it should be classified and roughly categorize it.
2. **Put in relation:** Place and move the ideas in relation to the other ideas. Pay attention to the opinions participants and try to find a consensus.
3. **Finish:** Continue until all ideas are positioned on the matrix.
4. **Decide:** Use the ideas of high value for the next method "Dot Voting".

Phase 3 | Ideate

2x2 Matrix – Prioritise

Template



Phase 3 | Ideate

I like – Reflect

Introduction

Description

This method is suitable for every step in the process, where constructive feedback can be collected and a positive mood can be maintained. The aim of the reflection exercise at this point is to capture the thoughts of the team members to be well prepared for a first sketch.

Method Key Facts

Format

Workshop

Number of Participants

min. 3, max. 5 people

Who to involve

Team members and target group (Social Innovators or Entrepreneurs)

Duration

30 min -1,5 h, could be split into separate sessions

Preparation & Setting

Until this point you should have decided on 3-5 promising ideas.

1. **Fill the template:** Enter a title of the top ideas from the "Dot Voting" in the rows. Each participant gets one post-it per column.
2. **Read out loud:** Each participant should read the post-it out loud before sticking it on the grid. Participants are encouraged to complete the sentences ("I like...", "I wish...", "I wonder..." etc.). Make sure everyone made use of their post-its.
3. **Reflect:** Once all the post-its are stuck on, it is time to reflect on the findings and question whether there are any insights that are important for the next steps.

Phase 3 | Ideate
I like – Reflect
Template

	I like	I wish	I wonder	What if?
Idea 1	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>			
Idea 2	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>			
Idea 3	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>			

Description

Narrow down the selection about which ideas should be prioritized for the next steps. The aim is to decide quick, prioritize and avoid paralysis. In order to avoid power games it is crucial that the opinions of all those involved are obtained.

Method Key Facts

Format

Workshop

Number of Participants

min. 5, max. 10 people

Who to involve

Team members and target group (Social Innovators or Entrepreneurs)

Duration

5–20 minutes

Preparation & Setting

Completed 2x2 Matrix

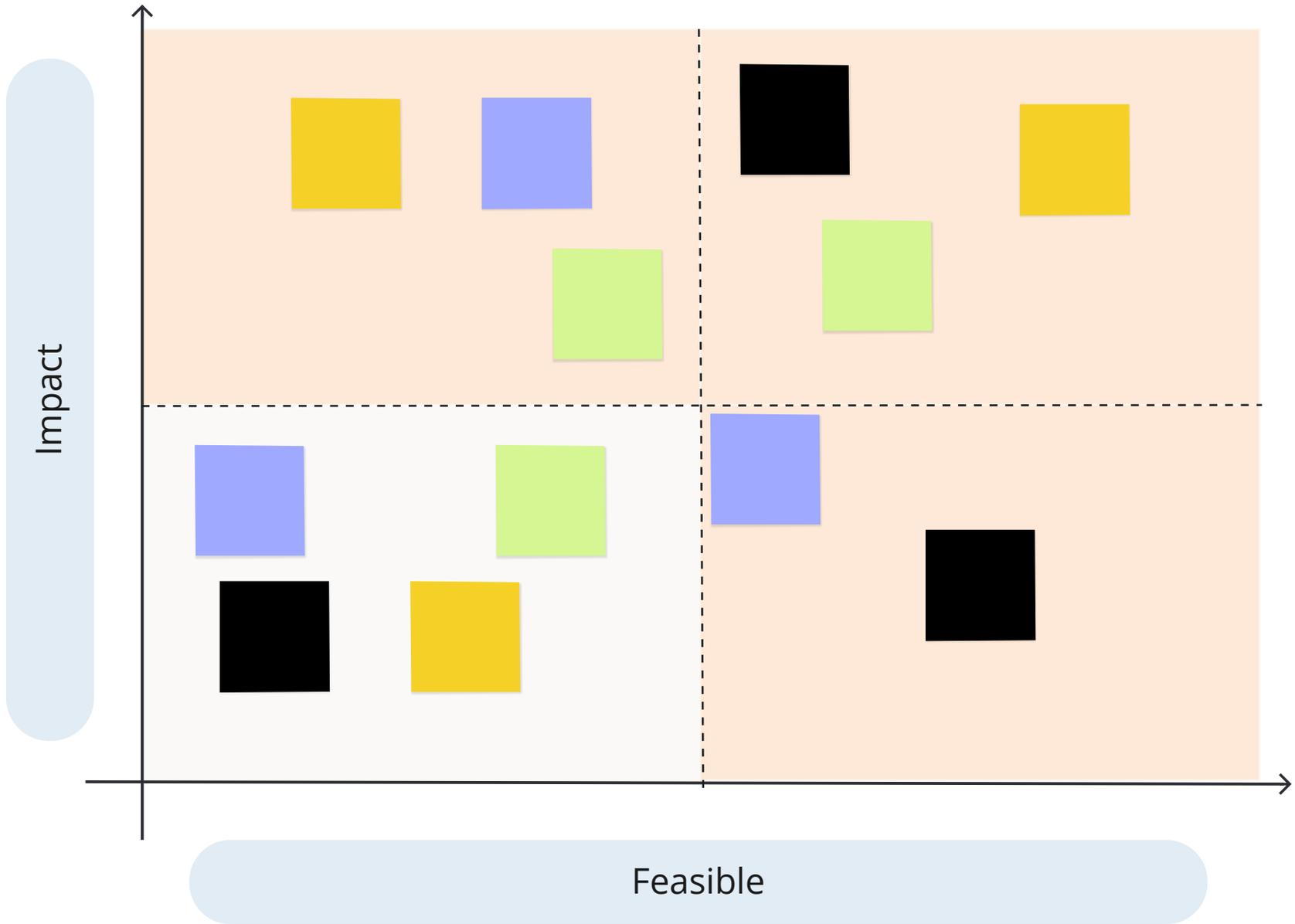
1. **Setting:** Set criteria for the vote. For example: customer benefit, supports the vision, greatest impact, quick to implement etc.
2. **Vote:** Use the best ideas from the 2x2 matrix and give each participant a certain number of votes (3-5) and ask them to make a choice. Each participant silently casts their vote on the post-it via "Dot Voting" which they think best meets the criteria. Several votes can also be cast on one post-it.
3. **Highlight:** Highlight the 3 ideas with the most points and continue.

Phase 3 | Ideate

Dot Voting – Decide

Template

- [Participant Name]



Phase 4

Prototype & Test

Description

This phase is critical for moving beyond theory, allowing you to validate your concepts, uncover potential challenges, and refine your solutions before full-scale implementation.

These activities will enable you to gather quick and inexpensive feedback, assess the feasibility of your innovations, and make informed adjustments.

List of methods

- Brochure
- Service Advertisement
- Cooperation Stakeholder Mapping
- Service Blueprint

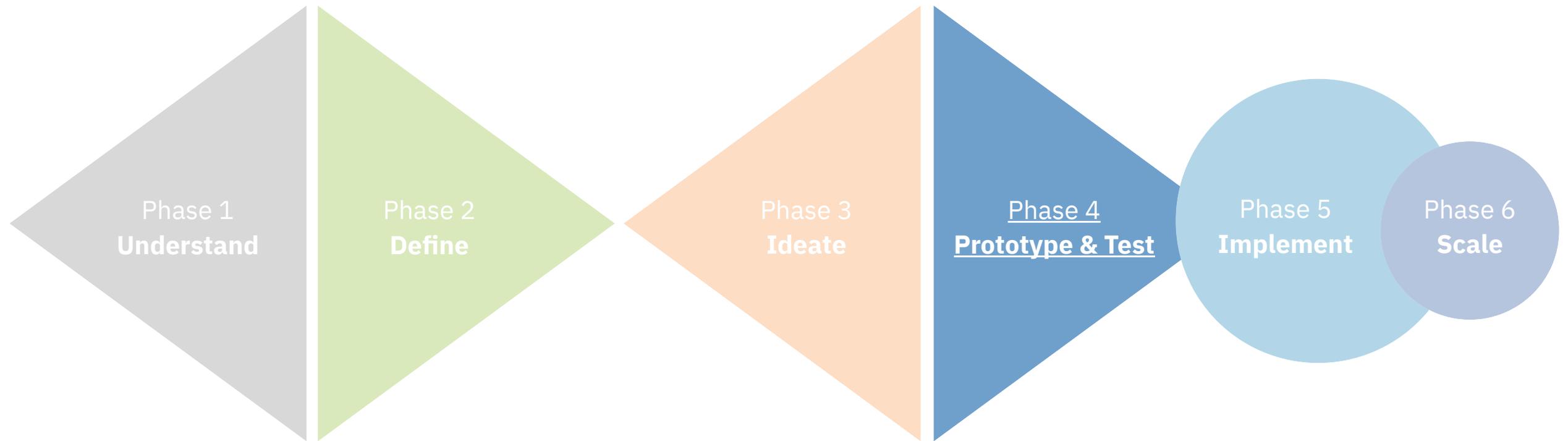
Background Knowledge

*Chapter 1, 2, 3 & 4 of the Guide
"Unlocking Potential – How to Make
Innovation Social"*

Toolbox

HOW TO MAKE INNOVATION SOCIAL?

Structure



Phase 4 | Prototype & Test

Brochure

Introduction

Description

Creating a brochure helps you to view your product from the user's perspective and gives you a solid starting point for further development. Be specific about what you are offering, and how each component of the offering benefits the customer.

Method Key Facts

Format

Workshop

Number of Participants

min. 3, max. 9 people

Who to involve

Team members

Duration

1 - 1,5 h

Preparation & Setting

By this point you should have read the chapters: 1,2 & 3 and selected both your most promising ideas and the target group.

1. **Prepare:** Every participant has understand the target groups needs, preferences, and pain points.
2. **Divide:** Divide into groups of max. 3 persons. Each group is assigned one idea.
3. **Create the Brochure:** Each group lists the **main features** of the idea and explain how each feature **benefits the target group**, writes a **brief description** of the idea, creates a clean, **simple layout** or uses a template, arranges the content logically, with **headings, bullet points, images, icons, or graphics.** (30 - 45 min.)
4. **Pitch:** Come together again in the large group and let each group pitch the brochure for max. 5 minutes.
5. **Dot Voting:** Use the dot voting method and decide for one idea which should be used for the next steps.

Phase 4 | Prototype & Test

Brochure

Template

Title

Subtitle

Brief description. Lorem ipsum dolor sit amet, consectetur adipiscing elit. Aenean commodo ligula eget dolor. Aenean massa. Lorem ipsum dolor sit amet, consectetur adipiscing elit. Aenean commodo ligula eget dolor. Aenean massa. Lorem ipsum dolor sit amet.

Pain solving message.



Benefits

Benefit 1

Benefit 2

Benefit 3

Main features

Main feature & Benefit 1

Lorem ipsum dolor sit amet, consectetur adipiscing elit.

Main feature & Benefit 2

Lorem ipsum dolor sit amet, consectetur adipiscing elit.

Main feature & Benefit 3

Lorem ipsum dolor sit amet, consectetur adipiscing elit.

Phase 4 | Prototype & Test

Service Advertisement

Introduction

Description

This method helps to clearly define and communicate the value of a service to its intended audience. It involves crafting a concise, compelling "advertisement" for the service, focusing on the user's perspective, the problem it solves, and the benefits it provides. This approach ensures alignment on the service's purpose and value, helping to refine its messaging and appeal.

Method Key Facts

Format

Workshop

Number of Participants

min. 4, max. 8 people

Who to involve

Minimum: Key Stakeholders and Target group
Additionally: External consultants

Duration

1,5–2 hours

Phase 4 | Prototype & Test

Service Advertisement

Steps

1. **Define the Service:** Use the brochure and briefly describe the service you are advertising, including its purpose, target audience and main benefits. Focus on what makes it unique, valuable, and relevant to the target audience.
2. **Draft the Advertisement:** Collaboratively write a short, engaging "advertisement" for the service. Include: A clear value proposition, the problem it solves and the benefits users will gain. Use plain, compelling language to resonate with the audience.
3. **Test the Advertisement:** Share your sketches with people unfamiliar with the service. Ask for feedback.
4. **Record and Review Feedback:** Track feedback, insights, and issues. Discuss what worked, what didn't, and prioritize changes.

Phase 4 | Prototype & Test
Service Advertisement
Template

THE TITLE COMES HERE

SERVICE TYPE

Aliquam nec finibus massa, non eleifend felis. Fusce eget finibus metus. Aliquam in varius eros. Curabitur justo nunc, semper nec hendrerit at, lobortis ut lorem.

BENEFIT!



yourdomain.com

SERVICE TYPE

FIRST LINE *Second Line*



**PAIN SOLVING
MESSAGE**

Aliquam in varius eros. Curabitur justo nunc, semper nec hendrerit at, lobortis ut lorem.
BENEFIT

Phase 4 | Prototype & Test

Cooperation Stakeholder Mapping

Introduction

Description

The stakeholder mapping tool helps to understand stakeholders' influence, interest, and compatibility with collaboration goals. By mapping stakeholders, you can assess opportunities for cooperation, foster trust, and build relationships suited to various types of collaboration.

Method Key Facts

Format

Workshop

Number of Participants

min. 3, max. 10 people

Who to involve

Team members

Duration

Half a day

Preparation & Setting

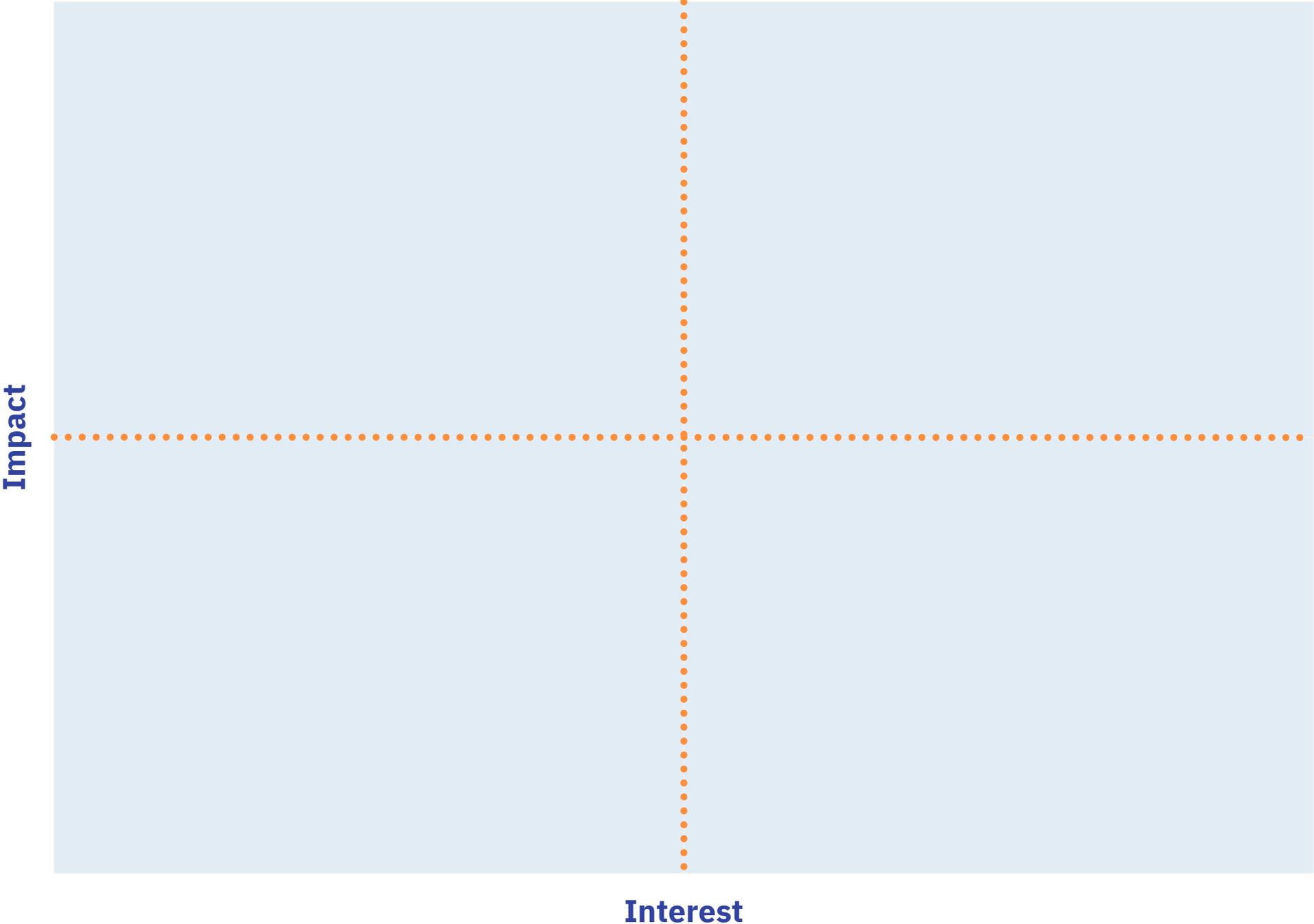
By this point you should have read the chapters 1, 2, 3 & 4 of the Guide "Unlocking Potential – How to Make Innovation Social"

- 1. Identify Stakeholders:** List potential stakeholders who might be affected by or have influence on your services. (e.g. Social Entrepreneurs, Impact Investors, NGOs, Government Agencies, Community Organizations, Academic Institutions, Corporate Partners). Some regions have already analysed the social innovation ecosystem, from which many of the stakeholders can be identified.
- 2. Assess Stakeholder Attributes:** Evaluate each stakeholder's level of interest on the topic and potential impact of synergies.
- 3. Place Stakeholders on the Matrix:** Place stakeholders in the appropriate quadrant of a 2x2 matrix (Interest vs. Impact). It is important to capture the key players without overloading the graphic with too many elements.
- 4. Develop Cooperation Plans:** Develop strategies for cooperating with each group based on their position in the matrix. Cooperation strategies include for example: Co-production, strategic alliances or knowledge exchange.

Phase 4 | Prototype & Test

Cooperation Stakeholder Mapping

Template



Governmental
Institution

Financial
Institution

Accelerator

Advocacy
organisation

Consulting
organisation

Co-
working
space

Phase 4 | Prototype & Test

Service Blueprint

Introduction

Description

The Service Blueprint is a chronological representation of the processes in which the respective effects are worked out with the customer. The Service Blueprint creates a common understanding of the interactions and processes that influence customer satisfaction, goal achievement and efficiency.

Method Key Facts

Format

Workshop

Number of Participants

min. 5, max. 10 people

Who to involve

Process Managers, SI/SE Experts

Duration

1-2 days

Phase 4 | Prototype & Test

Service Blueprint

Steps

1. **Map Customer Actions:** Start by identifying and documenting each step a social innovator takes when interacting with your support services.
2. **Identify Frontstage Activities:** List all direct interactions between your organization and the social innovators.
3. **Document Backstage Activities:** Map out the processes that support the frontstage actions but are invisible to the customer.
4. **Include Support Processes:** Add internal processes and external resources and partners that support and enable the service.
5. **Review and Refine:** Collaboratively review the blueprint, identify gaps or inefficiencies, and make necessary adjustments.

Phase 4 | Prototype & Test

Service Blueprint

Template

SERVICE	Step 1	Step 2	Step 3	Step 4	Step 5	Step 6	Step 7	Step 8
Customer Actions	□		□	□	□	□		□
Front of Stage Interactions	□			□				
Back of Stage Interactions	□	□		□			□	
Support Processes	□	□					□	□

Phase 5

Implement

Description

This phase is about implementing the tested approaches on how to support SI/SEs. The implementation process is on the one hand an internal organisational change process and on the other hand a validation of the developed support programmes in the 'real' market environment.

List of methods

- Implementation Roadmap
- Internal Change Process
- Market Implementation

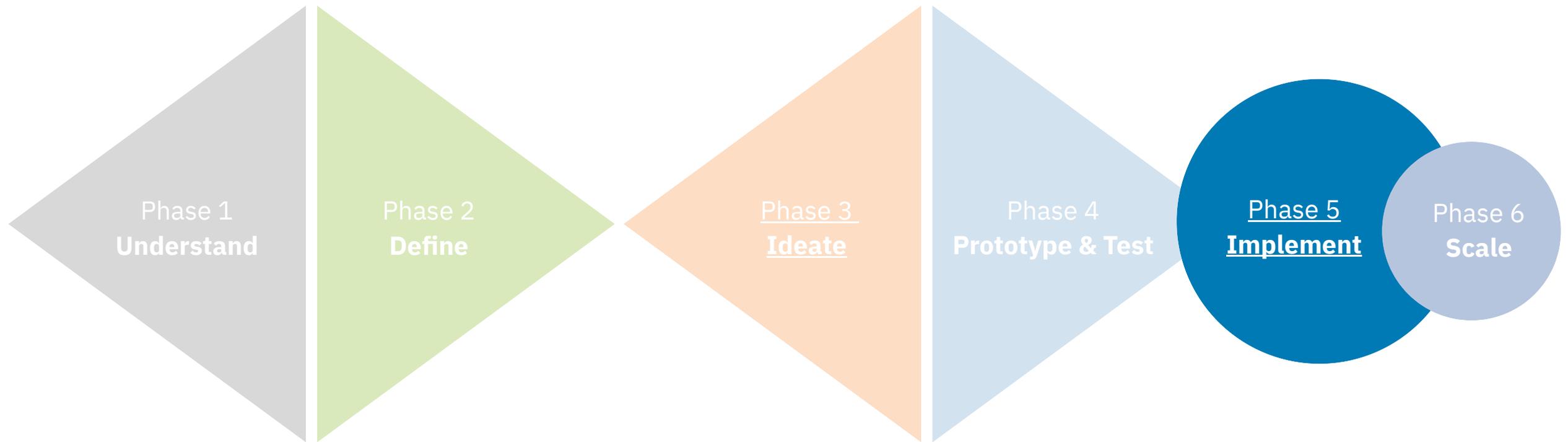
Background Knowledge

*Chapter 1, 2, 3 & 4 of the Guide
"Unlocking Potential – How to Make
Innovation Social"*

Toolbox

HOW TO MAKE INNOVATION SOCIAL?

Structure



Phase 5 | Implement

Roadmap for Implementation

Introduction

Description

The Roadmap for Implementation is a collaborative session where team members work together to plan and outline the roadmap, providing orientation to quickly gain clarity about the necessary steps, tasks and responsibilities for addressing complex problems. The aim is to gain a holistic overview as early as possible in the process.

Method Key Facts

Format

Strategic Planning

Number of Participants

min. 3, max. 10 people

Who to involve

Minimum: Project Lead, Department heads, SI/SE Experts.
Additionally: External consultants

Duration

Depending on how extensive the plan is.

Phase 5 | Implement

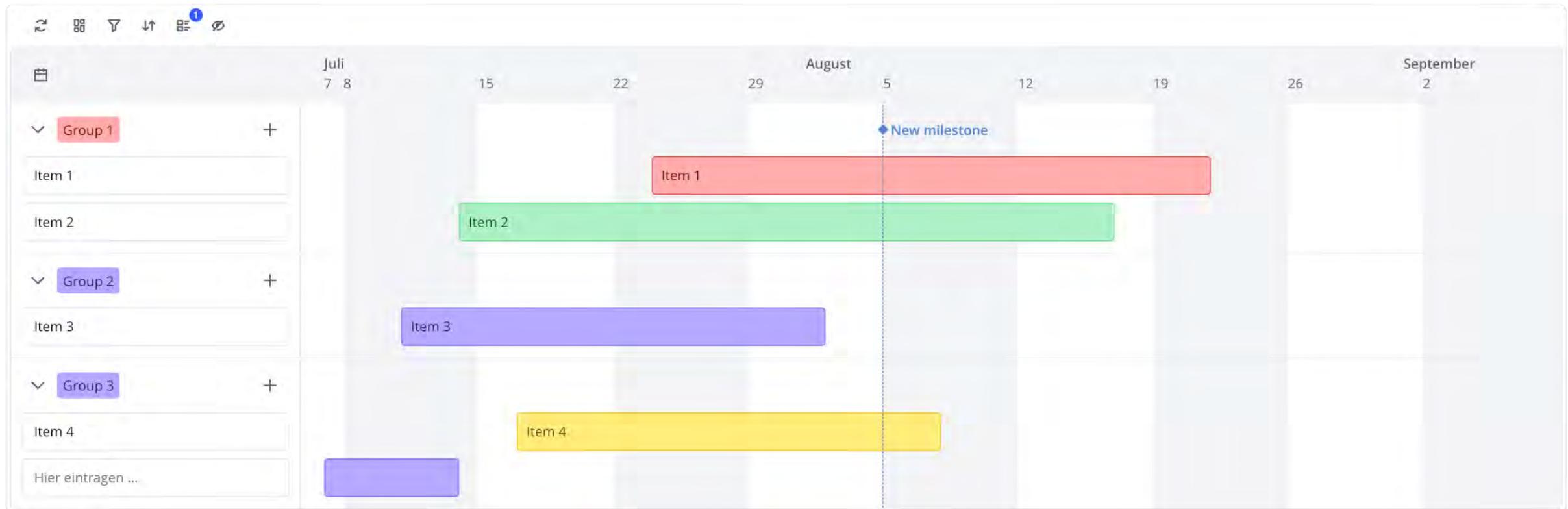
Roadmap for Implementation

Steps

1. **Define Project Objectives:** Clearly state the project's goals and the specific outcomes you aim to achieve.
2. **Identify Key Stakeholders:** Determine who needs to be involved and map out their roles and influence in the project.
3. **Establish Key Fields of Action:** Identify the critical areas or aspects of the project that need focused attention.
4. **Break Down Process Steps:** Develop a detailed sequence of actions required to complete the project, phase by phase.
5. **Assign Responsibilities:** Allocate specific tasks to team members, ensuring each person knows their role and what is expected.
6. **Set Timelines and Milestones:** Define a timeline for each task and phase, including milestones to track progress and ensure the project stays on schedule.
7. **Review and Finalize the Roadmap:** Conclude by reviewing the entire roadmap, making necessary adjustments, and ensuring consensus on the plan. Distribute the final version to all involved and set dates for follow-up checks.

Phase 5 | Implement

Roadmap for Implementation Template



This is just one example of a Miro planner. The idea is to adapt these steps into a project management tool that works best for your needs.

Phase 5 | Implement

Internal Change Process

Introduction

Description

The internal change process is a complex and multifaceted task that involves careful planning, communication, and collaboration across various levels of an organization. While the steps outlined – such as defining purpose, analyzing resistance, involving key stakeholders, and providing training – are essential, they serve as guiding indicators rather than a one-size-fits-all solution. Each organization's unique culture, structure, and challenges will require tailored approaches to ensure success.

Method Key Facts

Format

Strategic Planning

Number of Participants

Depending on how extensive the project is.

Who to involve

Minimum: Project Lead, Department heads, SI/SE Experts.
Additionally: External consultants (e.g. Change Manager)

Duration

Depending on how extensive the project is.

Phase 5 | Implement Internal Change Process Steps

1. **Define Purpose and Benefits:** Clearly articulate the purpose of the change and the benefits it will bring to the organization and stakeholders. (Chapter 1 & 2)
2. **Assess the Current Situation:** Understand the current organizational state, including challenges, and identify the need for change. (Phase 2)
3. **Develop a Change Strategy:** Choose a tailored approach for how the change will be rolled out and who will be involved. (Roadmap for Implementation)
4. **Communicate the Vision:** Communicate the reasons for the change, how it will benefit the team, and the vision for the future. (Chapter 2 & Future Mapping)
5. **Provide Training and Support:** Equip employees with the skills and knowledge they need to succeed in the new environment. (Chapter 1, 2, 3 & 4)
6. **Implement and Monitor:** Roll out the change gradually and monitor its progress.
7. **Celebrate Quick Wins:** Recognize early successes to maintain momentum and reassure the team that the change is producing positive outcomes.
8. **Embed the Change:** Institutionalize the changes by embedding them into the organization's culture, practices, and policies.

Phase 5 | Implement Go-To-Market Strategy

Introduction

Description

This tool enables you to efficiently launch services for social innovators and entrepreneurs. Acknowledging the complexity involved in such strategic planning, this tool reduces the process to its essential steps, providing a quick overview that simplifies implementation. The goal is to effectively engage social innovators and entrepreneurs, enhance the relevance of your offerings, and maximize social impact.

Method Key Facts

Format

Strategic Planning

Number of Participants

Depending on how extensive the project is.

Who to involve

Project Lead, SI/SE Experts.

Duration

Depending on how extensive the project is.

Phase 5 | Implement Go-To-Market Strategy Steps

1. **Define your Value Proposition:** Clearly explain how your services address the specific challenges of social innovators, such as funding or impact measurement.
2. **Design Support Services:** Create offerings such as workshops on social impact, mentorship programs with experienced social entrepreneurs, or access to impact investors.
3. **Identify Channels:** Partner with social enterprise networks, nonprofit organizations, and academic institutions focused on social innovation.
4. **Craft Messaging:** Use language that reflects the values and mission-driven nature of social entrepreneurs.
5. **Establish Accessible Pricing Models:** You might consider sliding scale fees, scholarships, or pro bono services for early-stage social ventures and collaborations with foundations or government programs that can subsidize the cost of your services.
6. **Impact-Focused Success Metrics:** Measure outcomes like the number of social ventures supported or social impact created.
7. **Launch and Promote Your Services:** Use targeted campaigns that highlight your commitment to social change.

Phase 6

Scale

Description

To achieve the social impact you want your innovation to have, the next step is to scale it up. This means that you try to expand your initiative. Depending on what your solution looks like, there can be different forms of scaling. It can be geographical, meaning you expand in your city, region, country or internationally or it can be a thematic scaling of your innovation, meaning that you go beyond your original focus area and combine your innovation with other topics and concepts.

List of methods

- Scaling Strategy Canvas

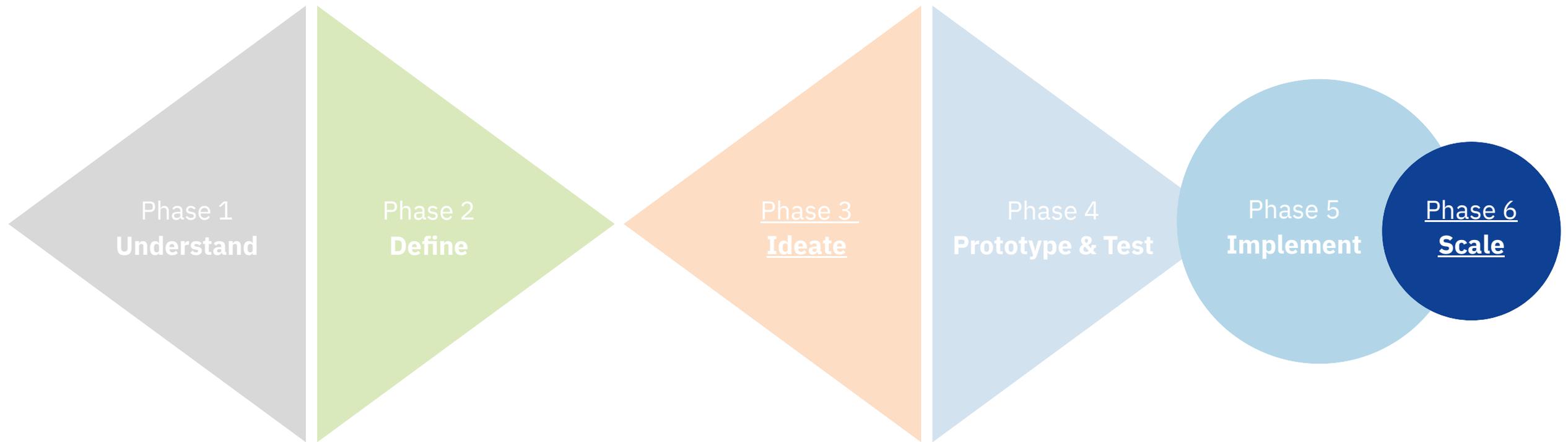
Background Knowledge

Chapter 3.f. of the Guide "Unlocking Potential – How to Make Innovation Social"

Toolbox

HOW TO MAKE INNOVATION SOCIAL?

Structure



Description

This method is useful for scaling or further developing your innovation. This can involve other markets, geographical areas or the further development of your innovation.

The aim of this exercise is to strategically place your innovation in a larger or deeper context. Ask yourself if the innovation is ready for this and seek out critical friends to help you. It could be that the context you have identified as a potential recipient of the innovation is not yet ready for it.

Method Key Facts

Format

Strategy meetings / workshops / process meetings

Number of Participants

No minimum or maximum. Just to note that the more people you involve the more you need to think of the set up for involvement.

Who to involve

Core people in your organisation. It could be relevant to involve stakeholders and consultation organisations for supporting the work.

Duration

Time is your choice here and it depends on how you design the process, who you involve and how deep you need to have the discussions, depending on the complexity of your initiative and organisation.

Preparation & Setting

Be sure to have all documentation and work regarding your innovation at hand. This discussion could take place at any time in your process. But it should occur after you developed and tested your innovation properly.

- 1. Invite the right people:** The scaling strategy canvas help you have the conversations needed to scale your innovation. First you need to have the right people in you conversation. These could be partners, employees, supporting organisations or even friends in other organisations in social innovation. You should ask your self "who are the best people to help me scale this innovation?" and try to invite them to the process.
- 2. Start the process:** There is no manual for scaling as every innovation is unique. But there are certain steps to take. this guide will help you build a process and a strategy for scaling. By answering and building content at each of the seven steps you will get a clear picture how to scale your innovation.
- 3. Open up the process:** Once you have developed your strategy, you need feedback on it. The best way to do this is to use the stakeholders identified in the process. They should be more or less informed about your work and can give you qualitative feedback. They are also potential stakeholders for your scaling. Asking for feedback also gives you an opportunity to communicate your innovation.
- 4. Fine tune your plan:** The final step is to incorporate the feedback into your strategy. Repeat steps 3 and 4 to achieve scaling.

Phase 6 | Scale

Scaling Strategy Canvas

Template (1)

Step 1: Identify Core Elements

Determine the essential components that make your innovation effective. This could be a specific process, technology, or approach. Through the steps of prototyping/testing and implementation you found out what works and what could be better about your innovation. Use this here to find your unique selling points.

Action: Document these elements in this box clearly so they can be replicated without losing their essence.

Step 2: Build Strong Partnerships

Leverage the strengths and resources of other organizations, governments, and communities.

Action: Identify potential partners who share your vision and can help amplify your impact. Establish formal agreements to outline roles and responsibilities. You can revisit your status quo mapping from Phase 2 'Define', and the collaboration stakeholder mapping from Phase 4 'Prototype and test'.



Phase 6 | Scale

Scaling Strategy Canvas

Template (2)

Step 3: **Adaptability**

Ensure your innovation can be tailored to different contexts and needs.

Action: Develop flexible models and frameworks that allow for customization while maintaining core principles. Gather feedback from new contexts to refine your approach. The methods from Phase 3 'Ideate' and Phase 4 'Prototype and Test' are recommended to use in this step.



Step 4: **Effective Communication**

Clearly articulate the benefits and impact of your innovation to gain support and buy-in.

Action: Use various communication channels (social media, reports, presentations) to share success stories, data, and testimonials. Engage with stakeholders regularly to keep them informed and involved.



Phase 6 | Scale

Scaling Strategy Canvas

Template (3)

Step 5: Policy Advocacy

Create a supportive environment for your innovation through policy changes.

Action: Engage with policymakers, participate in relevant forums, and advocate for policies that support your innovation. Provide evidence and case studies to demonstrate the need for and benefits of these policies. Identify the levels of society your innovation will engage with to be focused in your work. If your innovation is mostly engaging with local problems and stakeholders, go for the closest bodies of influence to you. In Phase 2 'Define' you can revisit the status quo mapping to identify the support structures that can guide you to where advocacy for your innovation could be needed.

Step 6: Sustainable Funding

Ensure long-term financial support for scaling efforts.

Action: Diversify your funding sources by seeking grants, donations, and investments. Develop a business model that includes revenue-generating activities to reduce dependency on external funding. For information about funding sources and business models read: Chapter 3.a. Financing the Future of Social Innovation and 3.d. Developing Sustainable Business Models of the Guide "Unlocking Potential – How to Make Innovation Social"



Phase 6 | Scale

Scaling Strategy Canvas

Template (4)

Step 7: Monitor & Evaluate

Continuously assess the impact and effectiveness of your innovation.

Action: Implement robust monitoring and evaluation systems to track progress and outcomes. Use this data to make informed decisions and improvements. Share findings with stakeholders to maintain transparency and accountability.

Action points

