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Research Paper

Adventure Workshop - How foreign industry knowledge can be accessed and utilised in times of digitalization with the help of cross-industry methods

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Friedrichshafen, May 10, 2016

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Abstract

In times of digitalization, companies nowadays are exposed to diverse and interconnected environments. This results on the one hand in an increased global competition and, on the other hand, in a change of the creation, consumption and distribution of knowledge. The increased connectivity and accessibility to knowledge requires an adaption of the firms’ business models to stay innovative in a competitive environment. One possibility to counteract this competition is to enhance the creativity of the employees in order to identify product improvements or new business models: in other words, to foster innovativeness.

Previous research has developed and applied several creativity methods to create an innovative environment. Yet, there is still a lack of research in the area of how a creative and innovative workshop should be designed in order to access and utilize foreign industry knowledge. Thus, this paper provides a workshop approach that comprises a combination of the methods Character Journey, Disney Loops and New Osborn. The first two methods serve as abstraction tools in order to provide cognitive distance, while the third method represents an analogy tool in this context.

The application of the workshop approach showed that the participants could overcome their local search bias and were able to develop various ideas of a wide range. However, it might be useful to integrate an organ of criticism in the workshop approach that controls the feasibility of the generated ideas.
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1 Introduction

Companies nowadays face situations including stiff global competition. As markets and economies are widely open, as products are being exchanged over continents and as technologies provide real-time information, businesses need to reconsider the way they manage their processes of value creation. But it is not only value creation that is being put at the center of debate. Before companies create value they find themselves in a position in which they need to generate ideas first. In order to survive, companies need to question their business services and produced products, the moment they start to sell them. In times of diverse and interconnected environments, businesses face a greater challenge of remaining profitable and innovative.

“Businesses are disappearing faster than ever before. Public companies have a one in three chance of being delisted in the next five years, whether because of bankruptcy, liquidation, M&A, or other causes. That’s six times the delisting rate of companies 40 years ago. Although we may perceive corporations as enduring institutions, they now die, on average, at a younger age than their employees.” (Reeves, Levin & Ueda, 2016)

In order to counteract this trend, companies need to train their personal to constantly reconsider current business models, to modify existing products and services and to identify technology trends that could have an impact on the industry.

This paper provides a workshop method that does not only enable employees to be more sensitive towards the issue of innovation - it also contains a methodology for systematic idea creation. The innovation approach illustrated in this paper can lead to significant changes in the way businesses and their employees contribute to new services and products. The paper provides a theoretical fundament to a practically feasible workshop. The first section of this paper provides a method to increase the degree of abstraction of participants. The so-called Character Journey assigns various kinds of fictitious characters to workshop participants. The second section of this paper introduces a method called Disney Loops. This method is used to reach a higher form of cognitive distance and to widen the solution space of workshop participants. After
theoretically explaining these two phases that address abstraction capabilities, this paper proposes a necessity for a tool that enhances analogical thinking. This paper suggests that a modified version of the Osborn Method, which is called “New Osborn”, is used in order to systematically connect abstract ideas to the subject of cross industry innovation and digitalization. At the end of this paper, the authors will discuss point out major chances and limitations related to the proposed workshop method.

2 Theoretical Foundation

In our choice of method mix we tried to forgo participant heterogeneity through cognitive distance to create a more radical innovative performance (Nootenboom et al., 2007; Rowley et al., 2000). To provide cognitive distance we have edited two abstraction methods: Character Journey and Disney Loops, for exploration and exploitation (Nootenboom et al., 2007; March, 1991; Rowley et al., 2000). With those two methods we have added on existing knowledge and forced the participants to evaluate, interpret and experiment with alternative lifestyles, environments and lifestyle-related needs. After having used these abstraction tools the Osborn Method presents itself as a way to organize the generated results and to help generate cross-industry analogies. Because of its uprooted use as an analogy-finding tool rather than an abstraction tool, we renamed it New Osborn.

2.1 Character Journey

The base for the adapted method used in this step is the Customer Journey, as it is described as a sequence of events and emotions that the prosumer goes through while being in an industry and/or using a product or brand (Norton & Pine, 2013). Having utilized this core idea of the Customer Journey we developed the Character Journey, in which the participants do not need to be actual consumers of the product/brand/industry in question, which makes data collection less complicated.

The Character Journey needs preparation of about four or more characters that the participants have to adapt as their own. It needs to include some core and some non-core information such as: name, age, marital status, leisure time
activities, time-relevant hardships and more depending on the authors choosing. This information helps to identify with the character for the time period of the whole workshop and be introduced to their lives.

A half-way realistic user experience that consists of perceptions that shape emotions, thoughts and attitudes is created by the character sheet. With a few changes to this example almost any aspect of life can be asked about whilst not straying from what the prosumer wants. The participants identifying with the character will help with transparency of what the prosumer needs.

The single or multiple (depending on the size of the workshop) participants who are given a character should read carefully through his or her short character sheet. A round-table introduction of each participant as their character will make sure that the participants are aware of the other characters in play. Using the characters’ journey rather than the real participants’ journey enables the participants to rid themselves of the local search bias through a change in mind set.

Doing a workshop often entails having participants from a specific company, most of the times even from the same department. They are being thrown into an innovation sphere and would approach the issue with what used to work in their experience. Research has shown that this routine or local knowledge has led to some sort of success but not to radical innovation (Reichwald & Piller, 2009). In theory participants wholly identifying themselves with the given character will try to inhibit their access to this local knowledge and be forced to rethink their approach.

2.2 Disney Loops

Named after well-known innovator Walt Disney and developed by Robert Dilts, the Walt Disney Method consists of role-play and needs the participants to take on the three roles of the ‘Dreamer’, the ‘Realist’ and the ‘Spoiler’ (Dilts, 1994). Only two of those are of essence for our method combination, called Disney Loops. Rather than asking the participant committing to the role of ‘Dreamer’ what a dream of his or hers is (Dilts, 1994; Eremit & Weber, 2016), the participants were asked to imagine an utopian world in which any kind of
solution to the characters’ created problems could be built or created. This complete freedom without limitations is a limitless innovation sphere into which new, radical ideas can breed.

After having given every participant the opportunity to express their utopian solution, they are written up for everyone to see. Then it is time for the second step of the Walt Disney Method. The ‘Realist’ is supposed to build on the ‘Dreamers’ dream and figure out how to realize it (Eremit & Weber, 2016). In the *Disney Loops* however a more toned down and realistic solution of what the ‘Dreamer’ created needs to be found. This step can be repeated multiple times with any given outlandish ideas presented by the ‘Dreamer’. The obtained result should be re-formed as a keyword to then use in the following *New Osborn* method.

### 2.3 New Osborn

Brainstorming is a creative technique to inspire the generation of ideas and to ease their expression (Coon, 1957). It was further developed by Alex F. Osborn by structuring the process of Brainstorming through a sequence of defined questions in order to modify existing products or processes (Osborn, 1963).

Until 2004 research on the Osborn Method has consistently shown that Osborn groups create fewer ideas than the same number of people working alone (Mullen et al., 1991; Pauhus et al., 1993; Taylor et al., 1958; Diehl & Stroebe, 1987). Nemeth et al. (2004) showed that groups performing the Osborn Method outperformed other groups or individuals. The study suggests that the ineffectiveness of groups exhibiting the Osborn Method depends on the allowance of criticism. Criticism allows people to search below the surface of their first suggestion and to come up with collective ideas that are not as predictable (Nemeth et al., 2004). However, the ground rule of the Osborn Method has always been to not criticize (Osborn, 1963). Therefore, in order to increase the probability of creative outcomes we highly recommend an open discussion and criticism in the second step of our creativity method.
Choosing this systematic discursive method as an analogy finding tool in our method combination helps organize the generated results and helps generate cross-industry analogies.

3 Method Description

In the following, the methods Character Journey, Disney Loops and New Osborn are described. The descriptions contain how and when to use the appropriate method, what is needed for it and who should use it.

3.1 Character Journey

In our test-workshop, the familiar Customer Journey method is modified to a Character Journey to operate the abstraction phase. It embodies the first step during the whole workshop and is used in order to identify problems from different point of views. By creating these character journeys, ideas and potentials should be generated and edited. People are the source for real change as they identify everyday challenges and provide subjective custom-fit solutions. By merging multiple custom-fit key solutions, the possible solution space is enlarged and reaches an ideal degree of cognitive distance. The achieved optimum of cognitive distance enables a variety of potential combinations of subjective solutions with both - industries as well as services - and thus, leading to cross innovation. Innovative companies should use the Character Journey method to create new ideas, products or services, targeting a multi-perspective perception of innovation fields.

In the beginning of the method different exemplary characters, which are prepared in advance, are handed out so that the participants get one character description each. If the group of workshop participants is bigger, groups up to a handful of members have to work with one description together. The first step is to read the assigned character. Every participant has to empathize with their given character who probably has different views and circumstances in life.

Every participant has been instructed to present her results to the others. Thereby, core questions need to be taken into account. Everyday challenges
with respect to the automobile industry play a key role in determining participants’ presentations.

The following step involves the concretization of problems that would arise, especially when using a car in a kind of way. Moreover, there is the option to substantiate identified challenges on a full working day, a half-day and on a free day. In order to generate exceptional ideas a discussion with all participants is required. The exchange of information between the characters is essential. Within this discussion the participants should refer to the interposed question of utopian idea improvement, implemented by the *Disney Loops* method, described in the next chapter.

For the *Character Journey* the most important tools are the prepared characters. With these prepared characters the best case scenario is generated when intel from two different perspectives can be gathered. It is important that the prepared characters are connected among each other, for instance through a regional connection. A flipchart is a practical solution for collecting and clustering the generated ideas. Furthermore, a room with different tables for the working groups is needed.

### 3.2 Disney Loops

The *Disney Loops* method can be used in order to abstract the generated ideas. Hence, it is used besides the *Character Journey* in the abstraction phase in our workshop. The method bridges the gap between infinite craziness and the recurrence to rationality. We assume that phantasm is a form of progress and the *Disney Loops* method describes a progress from phantasm to future. The method is set during the discussion phase of the *Character Journey* in terms of idea generation. It first involves a kind of utopian idea improvement. Therefore, the part of the Dreamer of the Walt Disney Method is crucial. The participants are invited to improve their generated ideas without any restrictions. They should imagine solving challenges by answering the question *if you could choose any kind of solution to make your character’s life more comfortable, which one would it be?* Thinking without limitations is an efficient tool to evolve new ideas. It can show people that visions are not retainable. Thereby it is very
important to completely empathize with the given character. Afterwards every character should present their results. Due to the ‘Dreamer’ of the Walt Disney Method creating several abstract problems the method is a suitable instrument for cognitive abstraction.

Subsequently, realistic ideas have to be created by scrutinizing the utopian ideas considering what is realizable. In this second step the Realist of Walt Disney is in demand, who asks himself *if you would have to provide a realistic version of your utopian solution, what would it look like?*. Therefore, another categorization is necessary to build up categories of the individual ideas. By clustering major topics within the potential solution space, it is feasible to define an overall objective out of the challenges. The comprehensive benefit for all participants can be generated by bringing down the problems to a common denominator. Every participant has to tell from their character’s point of view: *What can the character offer? How can it benefit from the other offers?* Thereby challenges, which are mutually dependent negatively or exclude each other, should be noted. Individual challenges, which complement or develop each other, should rather be mentioned by defining an overall goal. By interconnecting the individual problems, they have to be modified that they fit together. In the end, a discussion about with all participants is necessary to merge the different interests.

The method of *Disney Loops* can be useful by generate and develop various ideas and categorize them to get a comprehensive overview. For applying the method, the creativity of the participants is required and moreover, a flipchart to collect and categorize the ideas, is helpful.

### 3.3 New Osborn

The Osborn Checklist includes an analogy character by identifying cross innovations and thereby access foreign industry knowledge, which we want to use in our workshop. It is presented as an analogy-finding-tool instead of an abstraction-tool, as is its original purpose. Since we use this tool in a slightly different way, it is called *New Osborn*. It still includes its characteristics of easy applicability, transforming ideas into new ones, flexibility, trial and error
approach, gathering different perspectives and putting all challenges and
possibilities of an idea in a new context (Kavadias & Sommer, 2009). This tool
appears as the third tool in the workshop in order to improve, enhance and
refine the ideas, which emerged in the earlier workshop phases. Thus this tool
enables the workshop participants to systematically scan their solutions and
search for effective and beneficial cross industry- as well as cross service-
combinations. As identified in the test-workshop this tool is a great way to
create analogies to cross industry and cross service fields such as mobility,
health, digitalization, networking, entertainment, scheduling and many more. In
our workshop setting, the tool is used to explore and improve emerging ideas.

The participants of the workshop will identify different problems for each
color character presented in the Character Journey. After finding different ideas or
solutions according to those problems in the Disney Loops, the participants can
improve those ideas by sticking to the New Osborn guidelines and answering
the eight questions of the Osborn checklist. The guidelines formulated by
Osborn include withholding criticisms, trying to find as many possible answers
and ideas to the particular question as possible, trying to combine different
ideas and welcoming wild ideas (Isaksen, 1998). Those guidelines are
explained in more detail in the theoretical foundation part (2.3). After making
those guidelines clear, the next step is to give thought to each of the following
questions and try to enhance and improve the existing idea by responding to
those questions. The questions according to the Osborn Checklist are: 1. Can
you put the idea/solution/product to other uses? 2. Can you adapt the
idea/solution/product somehow? Can you modify the idea/solution/product in
any way? Can you magnify the idea/solution/product in any way? Can you
minify the idea/solution/product in any way? Can you combine the
idea/solution/product to anything? Can you substitute the idea/solution/product?
Can you reverse the idea/solution/product? Can you rearrange the
idea/solution/product?

After finding solutions and inspiration by responding to the presented questions,
the idea will be examined from varies different perspectives and linked to new
cross industry sectors.
4 Practical Example

This part describes the implementation of the conducted workshop from the 19th of May 2016. It was held in the premises of the Zeppelin University and involved a group size of five people, four workshop participants and one moderator. Once the participants presented the Character Journey descriptions, the moderator categorized the core characteristics of each member, such as housing, job and family situation as well as travel frequency. The characters can be summarized as follows:

Marina (22): She studies in Constance and travels twice a month to Stockholm to visit her boyfriend. Marina does not own a car and has to keep an eye on her budget.

Vera (41): Since Vera is a single mother and a part-time teacher she needs to plan strictly her daily schedule. She lives in a small town and needs her Minivan for nearly every meeting.

Udo (78): As a pensioner Udo has a lot of time he would like to spend more often with his family. But as he feels more and more unsecure to travel long distances, his car spends most of the time in the garage. He struggles with the increasing digitalization.

Thomas (55): Thomas is a building contractor. He has to travel more than 200 kilometres per day. He wishes for an opportunity to use his time in the car more efficient.

In the next step, the characters identified core problems and challenges in their daily life. In our workshop, such problems were namely digitalization, large distance to cover, inefficient use of time and dependence on a small budget. With this step, the “abstraction phase” is completed.

Marina (22): Marina needs a cheap way to cover the long distance. She can offer herself as a driver and a travel companion.

Vera (41): She could lend her car to someone else in order to save some time. In return, she wishes for the execution of some everyday rides like picking up the purchases from the grocery store.

Udo (78): A driver for long distances would help Udo to visit his family more frequently. For those rides he is willing to provide his car.

Thomas (55): In order to use his time in car more efficient Thomas would like to have a driver. The driver may use his car for his own purposes while Thomas is working.
Out of this matrix, the participants developed a tool to cover as many needs as possible:

*A regional mobility-software that coordinates the travel frequency of the community.*

By using the Osborn method, the participants questioned this idea and developed and improved it further. The following paragraph shows the workshop results.

**Put to other uses:** Friendscout24.de, Outfittery, Coursera.com, futurelearn.com, youtube.com

**Adaptation:** Meinfernbus.de, Deutsche Bahn, blablacar

**Modify:** Social Service, teaching, mutual education

**Magnify:** Nationwide travel network

**Minify:** Neighborhood travel network

**Combine:** Facebook-groups, volunteer work, tuition journey

**Substitute:** University classes and tutorials, mobile nursing service

**Rearrange:** GoButler, 61 minutes, Google Now, Siri, Cortana, Rosetta Stone, Webinars

In the end, all participants evaluated the workshop.

Furthermore, there was a divergence in understanding the *New Osborn* – method. It is advisable to give an example of an Osborn result. To achieve the highest possible abstraction, it would be better if each character works through this method by himself and combines the results in one result.

### 5 Critical Assessment

In the following chapter, the previously described method combination will be critically assessed. By identifying benefits and limitations in the usage of the combination of methods presented, we hope to improve the sequence of the three phases abstraction, analogy and assessment in order to create a successful workshop about the topic how to access and utilize foreign industry knowledge in times of digitalization with the help of cross-industry methods.
First of all, we want to present potential benefits we identified by evaluating our method in the conducted test-workshop. Starting with the **Character Journey**, we realized introducing characters and new biographies created new perspectives for the participants thereby made them overcome their local search bias for new ideas. The next step, the **Disney Loops** was a great way to achieve a wide solution space for innovative and creative ideas with a highly motivational character while not requiring much preparation or material. With our **New Osborn** concept, it was possible to achieve cognitive distance and a connection to cross-industries by using its analogy character.

In the process of the test-workshop there were also several limitations within the application of the method combination. As a first critique, it was recognizable that the method requires a great deal of creativity. Also there is no critical part included in the **Disney Loops**, which results in a very wide and diffuse solution space. In addition, there needs to be more research, whether the different characters in the **Character Journey** should be related biographically and regionally, or instead should be solo-focused. Another important topic for further research would be the clarification of a clustering and filtering process for developed ideas. During the course of the workshop special emphasis was put on the focus of the mobility topic “around the car”, which can be either a positive or negative characteristic. Also the group of participants should not be too large, due to interaction and discussion factor of the group work.

All in all, it is a fun method to use, the tools were adaptable to everyone and participants acted very interactively and enjoyed the workshop. This makes us feel like we used the best parts of the three presented methods of Customer Journey, Walt Disney Method and Osborn Checklist and combined them into a new method to access foreign industry knowledge.
6 References


