TOOLKIT

Open Innovation Program

A framework and guide for innovation support organizations to foster collaboration between SGBs and large enterprises

german cooperation
DEUTSCHE ZUSAMMENARBEIT

Implemented by
giz Deutsche Gesellschaft für Internationale Zusammenarbeit (GIZ) GmbH

Make-IT in Africa

VIRIDIAN

About this guide

The Open Innovation Program (OIP), conceptualised and driven by GIZ's Make-IT in Africa Initiative, aims to bridge the gap between the innovation needs in the private and public sectors, and the local small and growing businesses (SGBs) that can provide needs-oriented solutions. The program is available for any organization to use to foster collaboration within their local ecosystems, and this toolkit aims to provide support for planning and running the program.

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Contact Person: MAKE-IT-IN-AFRICA@GIZ.DE

Who we are

About Make-IT in Africa and GIZ

Deutsche Gesellschaft für Internationale Zusammenarbeit (GIZ) GmbH implements this project on behalf of the German Federal Ministry for Economic Cooperation and Development (BMZ). GIZ is a federal enterprise with worldwide operations. We support the German Government in the field of international cooperation for sustainable development. We are also engaged in international education activities around the globe. Through our work we assist people and societies in shaping their own future and improving living conditions.

GIZ's Make-IT in Africa created and drove this OIP. Make-IT in Africa believes in the catalytic power of African innovation and digital technologies for green and inclusive development. In close collaboration with digital visionaries such as startups, innovation enablers, and political partners, we empower African innovation ecosystems. Together, we aim to strengthen an environment in which the full potential of African digital innovation can unfold.

www.make-it.africa/

About Viridian

This toolkit was developed by Viridian, on behalf of GIZ Make-IT in Africa. Viridian is an impact agency that designs and delivers programs for early-stage entrepreneurs, investors, and entrepreneur-support organizations across Africa's entrepreneurial ecosystem. Our programs act as a catalyst for these key economic actors, ultimately growing shared prosperity across sub-Saharan Africa.

www.viridian.africa

What is this toolkit for?

The OIP Toolkit is a guide for African innovation support organizations (ISOs) who want to increase collaboration readiness among SGBs and large enterprises from the private and public sectors in their ecosystem. Collaboration between these different stakeholders through a process of open innovation offers a pathway to delivering innovative solutions to formidable problems at scale. Although public-sector partners offer a distinct avenue for innovation, which may be more appropriate for certain entrepreneurs, this toolkit primarily focuses on building relationships and developing solutions with companies in the private sector.

By providing a set of principles and best practices for the key aspects of the open innovation process, this toolkit creates a foundation for ISOs to design and customise their own OIP. The toolkit includes an overview of the core OIP model, guidelines, templates, and supplementary materials that ISOs can grab as needed to design and implement their program.

KEY TERMS IN THIS TOOLKIT

ISO (INNOVATION SUPPORT ORGANIZATION): This is an umbrella term for incubators, accelerators, co-working spaces, or Makerspaces. In simple terms, it's defined as an organization currently active with a physical local address, offering facilities and support for tech and digital entrepreneurs. As key connectors between different players in the innovation ecosystem, ISOs are the drivers of open innovation.

SGB (SMALL AND GROWING BUSINESS): As defined by the Aspen Network of Development Entrepreneurs (ANDE), SGBs are "commercially viable businesses with five to 250 employees that have significant potential and ambition for growth." We refer to SGBs in this toolkit since these are the types of business that will best contribute to and benefit from open innovation partnerships.

LARGE ENTERPRISE: For this toolkit, we use the term "large enterprise" to encompass a range of potential partners for SGBs, primarily mature private companies and multinational corporations. However, you may also approach government agencies (such as local municipalities) for partnership.

COLLABORATION READINESS: The ability to engage in open innovation requires open-mindedness; participants need to be open to new ideas and ways of working. The stronger the learning cultures and leadership capabilities of an organization, the more likely it is to collaborate successfully. These mindsets and behaviours can also be taught, to increase collaboration readiness – that's one of the jobs of your OIP. It's worth noting that all parties in a partnership should, at minimum, be open to collaborating and should preferably be at the same level of collaboration maturity (see our Ecosystem Diagnostic in Chapter 2.1).

PARTNERSHIPS: In this toolkit, the term partnership covers many types of mutually beneficial relationships between SGBs and large enterprises. This can include piloting as a reciprocal learning opportunity, off-take agreements, innovative supplier contracts, acquisitions, and even strategic marketing partnerships where both parties gain credibility. Partnership is the ultimate goal of your OIP.

How to use the toolkit

There is no single roadmap for open innovation. The process of building partnerships between SGBs and the private sector will be different depending on the ISO, the partner landscape, and the country-industry context. Rather than a step-by-step guide, this toolkit is broken into chapters that correspond to different phases of an OIP. Each chapter offers some background, top tips, and additional resources on the different elements of the OIP model.

Grab these tools

Look out for these tools in each chapter:

TOP TIPS

Follow our baseline approach for a successful open innovation process

COLLABORATION IN ACTION

Real examples of ISOs running open innovation and partnership programs in Africa

TEMPLATES

Find helpful templates to streamline your OIP process.

RESOURCE ROUNDUP

Get links to additional resources, reports, and guides.

Meet the actors of the open innovation case studies

There are many examples of open innovation from ISOs, hubs, and other ecosystem players on the continent. The toolkit includes four case studies that give a behind-the-scenes look at the organising and facilitating processes. They serve as examples of the different shapes open innovation can take.

OPEN INNOVATION ZAMBIA WITH BONGOHIVE

Location: Zambia

This official Make-IT Africa OIP is a six-month acceleration challenge focused on the areas of FinTech, GreenTech, and Smart Cities, with startups based in Lusaka. BongoHive created challenge statements with the help of experts in the respective fields, including those from corporate spaces. Mentorship and coaching, largely provided by BongoHive, will help the startups become investment ready. This culminates in a demo day, where the startups present their businesses to private and public stakeholders, with the hopes of attracting investment.

FIGHT FOR ACCESS ACCELERATOR WITH RECKITT

Location: South Africa and Brazil

This six-month accelerator is a joint initiative of the ISO Yunus Social Business and Reckitt, the producer of top global brands in health, hygiene, and nutrition. The program aims to foster innovation in the water, sanitation, and hygiene (WASH) sector by facilitating mentorship between Reckitt employees and social entrepreneurs from the target communities.

OPEN INNOVATION PROGRAM UGANDA WITH STARTHUB

Location: Uganda

This official Make-IT Africa OIP is a five-month program focused on helping startups take their businesses to the next level through a co-creation process with industry leaders. The program was specialised for the Smart City sector, with 15 local startups with minimum viable products (MVP) receiving coaching, mentoring, and training on further developing their industry solutions for a demo day.

SMART CITY MOBILITY CHALLENGE WITH TURBINE

Location: Mauritius

This partnership between Moka Smart City and the corporate ISO Turbine was a 2019 challenge aimed at startups from Kenya, Nigeria, Rwanda, France, South Africa, Sweden, Singapore, Reunion Island, and Madagascar. The challenge centred on ecological and infrastructural innovation from mature startups to improve mobility in the city.

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CHAPTER 1

Introduction to open innovation & collaboration readiness

1.1 What is open innovation?

Open innovation is a collaborative approach to problem-solving that looks beyond the boundaries of the organization to find new, creative solutions to consequential problems. The need for open innovation often arises when large enterprises in the private and public sectors realise they cannot solve all their problems from the inside-out.

Changes in the competitive landscape, disruptive technologies, the pursuit of new markets, the need for product innovation, and organizational inefficiencies are all formidable challenges they face. But due to their size, age, and rigid structures, large enterprises may lack the right internal knowledge, competencies, resources, or dynamism to respond.

This is not just a problem for the organizations themselves, but for society more broadly since corporates, governments, and other large enterprises are the drivers of job creation, economic growth, and development. As a result, large enterprises in this situation need to consider innovating from the outside-in.

Outside-in approaches can take many forms: new talent hires, M&A, R&D initiatives, and strategic partnerships. **It is the mindset of open innovation – a willingness to collaborate with external individuals and entities – that can enable all these different strategies.** Following an open innovation process, large enterprises can engage with SGBs in their ecosystem to share information and resources as they tackle a particular problem together.

The open innovation process combines the experience and institutional knowledge of large enterprises with the creativity and agility of SGBs as they collaborate to reach a common goal. Usually taking the form of a challenge, an OIP can vary in objectives and format, depending on the goals of the large enterprise, the sector, and the characteristics of the business ecosystem.

In practice, large enterprises tend to use open innovation for a few key strategic objectives:

- marketing
- gaining market or customer insights
- recruiting talent
- product/service development

SGBs also have their own goals for open innovation:

- marketing
- piloting new concepts
- distribution
- supplier deals
- acquisition

Open innovation is also beneficial for the wider ecosystem. A thriving innovation and entrepreneurial ecosystem can unlock more financial success, economic growth, and positive social impacts.

Whatever the aim, open innovation is a vital way to nurture entrepreneurship and bring emergent innovations to the market.

Open innovation is not for everyone

To get the most from an open innovation challenge, both partners need to have a strong sense of their strengths, their goals, what they can offer each other, and collaboration readiness. Consider seriously whether open innovation is the right process for the partners in your ecosystem. The examples below are all indicators of collaboration readiness. Large enterprises and SGBs don't need to tick all these boxes to be a good fit for open innovation, but it is useful to know where they stand on each if they're going to participate in your program.

Large enterprises, this is for you if...

... you have a consequential problem that you cannot solve internally.

... you aim to form long-lasting relationships with SGBs (e.g. suppliers, licensing agreements).

... you have clear goals around marketing, market insights, talent management, or product development.

... you're prepared to work with intermediaries and SGBs to understand the problem and solution landscape.

... you're ready to share your knowledge, networks, and other key resources with your partner SGBs.

... you have employees who are willing and able to mentor an SGB.

SGBs, this is for you if...

... you are a registered business, compliant with all regulations and have all documentation in place.

... you have market-tested products and customer traction that aligns with the challenge of the large enterprise.

... you have untested product or service components ready and are prepared to customise and expand them on the program.

... you have a clear value proposition for large enterprises, such as a competitive pricing structure, protected IP, or a skilled team.

... you have partnered with large enterprises before.

... you have multiple possible business models or partnership arrangements to propose to your partner organization.

... you have a very strong orientation toward co-creation and working with external collaborators.

What's in it for SGBs

SGBs tend to be strong on energy, innovation, and agility, but weak on experience, structure, and resources. Although their small size and light infrastructure are what enable them to adapt and move quickly to find product-market fit, they have a liability of newness, which means they need external partners to help them scale. Collaboration with large enterprises – and the processes that facilitate this – offers SGBs a pathway to critical knowledge, resources, and funding on several fronts.

Mentorship. SGBs can receive mentorship from large enterprises in a variety of areas, including strategy, business development, management practices, and technical problem-solving.

Resources and networks. SGBs can gain access to assets that large enterprises take for granted – things like office space, equipment, and infrastructure. In addition, SGBs can be plugged into the large enterprise's networks of suppliers, customers, and partners.

Funding. If the collaboration is successful in terms of outcomes or the working experience, SGBs may be able to secure seed funding, or even equity investment, from large enterprises.

Access to markets. The collaboration may grant SGBs access to a larger portion of the market or new markets through large enterprises. Large enterprises can become customers, offer distribution, or partner on joint ventures.

Collaboration with large enterprises can unlock tremendous value for SGBs. Yet, **SGBs often find it difficult and time consuming to form relationships with these incumbents – they often don't even know where to begin. This is where ISOs and open innovation can bridge the gap.**

What's in it for large enterprises

As market leaders, large enterprises have the systems, organizational heft, and budgets to bring solutions to scale. However, the same systems that allow incumbents to continuously deliver at scale can lead to institutional inertia, making them sluggish and slow to respond to technological changes. This leaves them vulnerable to disruptive innovation from challengers. Through collaborations with SGBs, open innovation offers large enterprises a pathway to agility and innovation in a number of ways.

Product-market insights. Open innovation challenges serve as a low-cost test lab where large enterprises can gain insights from the experimental efforts of multiple SGBs. Large enterprises can access the most cutting-edge technology, top-tier talent, and learnings that they can feed back into their own R&D or innovation teams.

Employee engagement. By working directly with large enterprise teams, SGBs can bring a breath of fresh air, renewed energy, and expertise to their internal problem-solving. The typically young and tech-savvy SGB teams can share their on-the-ground market knowledge, tools, and outsider perspectives. And large enterprise teams can integrate their agile approaches and technical processes.

Social responsibility. By engaging with and supporting new, local businesses, large enterprises can make a positive impact on the social and ecological spheres which they influence. This can certainly contribute to CSI/CSR initiatives but can also be a pathway to embedding corporate social responsibility within the enterprise through the incorporation of sustainable innovations into the value chain.

Marketing and public awareness. The public nature of an OIP – with its engagement of the wider innovation ecosystem – gives large enterprises a platform on which to showcase their brand while actively pursuing innovative solutions that will benefit their customers and society. Further, the collaborative processes of open innovation demonstrate transparency, dynamism, and altruism on the part of large enterprises, giving them an opportunity to shape their brand.

Product innovation. In an ideal OIP in a mature ecosystem, the SGBs can develop technology or solutions that directly add value for large enterprises through market expansion or product innovation. They can do this through partnership arrangements, such as supplier agreements, a joint venture, or an acquisition.

Large enterprises, which are the most capable of weathering markets, invest early in new technology and dedicate resources to experimentation. SGBs have innate flexibility, expertise, and energy that cannot be easily mimicked by large enterprises. However, **searching for the right SGB partners can take time and resources that large enterprises may be unable to dedicate. This is where ISOs and open innovation can play matchmaker, connecting large enterprises with SGBs that can address their needs.**

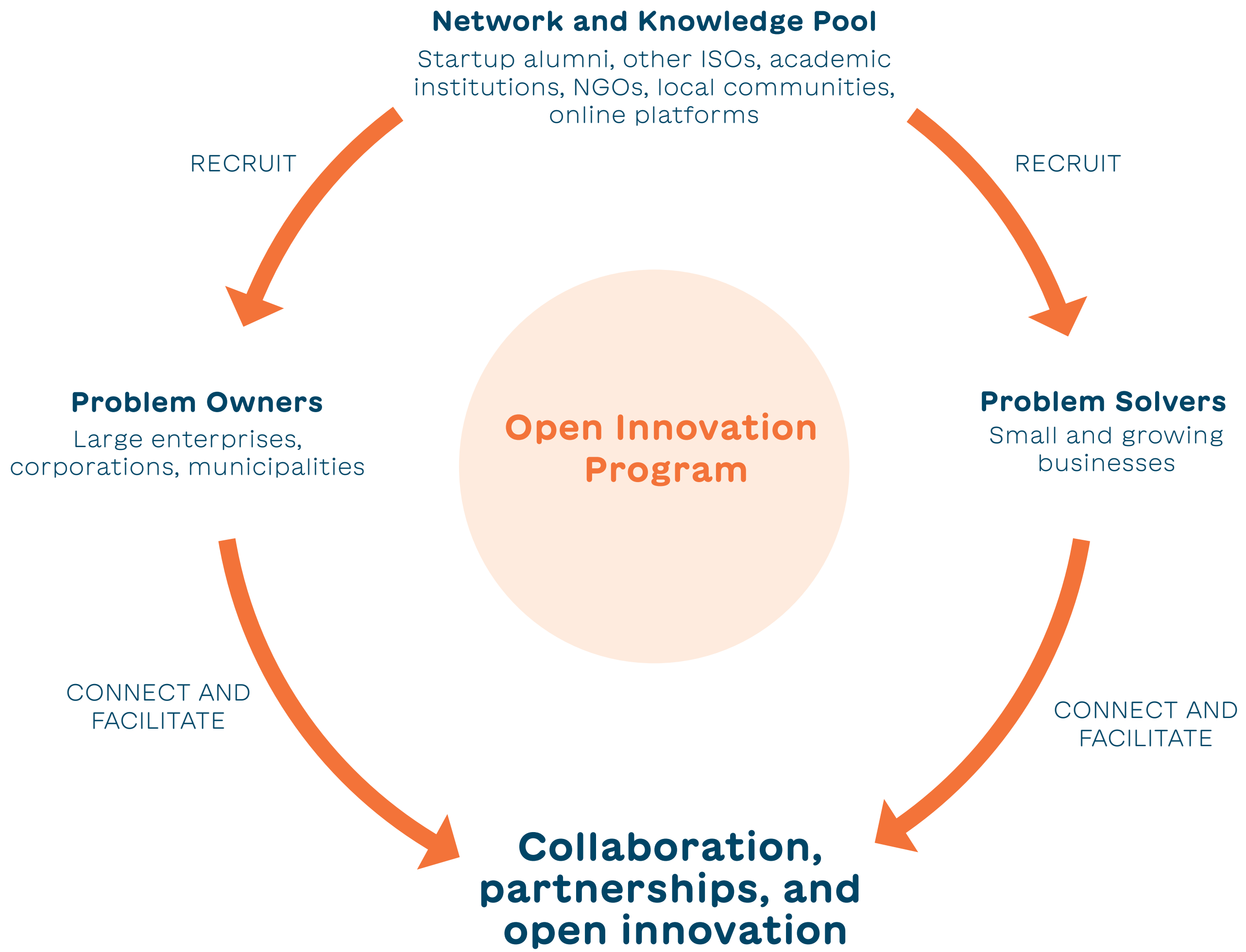
1.2 The role of ISOs in open innovation

Intermediaries can play a pivotal role in making open innovation work in practice. ISOs – with their fluency in business administration, entrepreneurship expertise, and vast connections within the innovation ecosystem – play the central role in facilitating open innovation. ISOs are perfectly positioned to start conversations between investors, corporates, government bodies, and entrepreneurs, and guide these players to build mutually beneficial partnerships. Helping to foster collaboration and partnerships between SGBs and the private/public sector will lead to greater entrepreneurial success, and a more connected and active innovation ecosystem.

Ecosystem players

Navigating your entrepreneurial ecosystem is different for an OIP than for a typical incubation program. As an ISO, your role here is to recruit problem owners (such as large social enterprises, corporations, and municipalities) and problem solvers (SGBs). You facilitate their collaboration by connecting them and creating a space for them to exchange knowledge, co-create, form partnerships, and ultimately engage in open innovation.

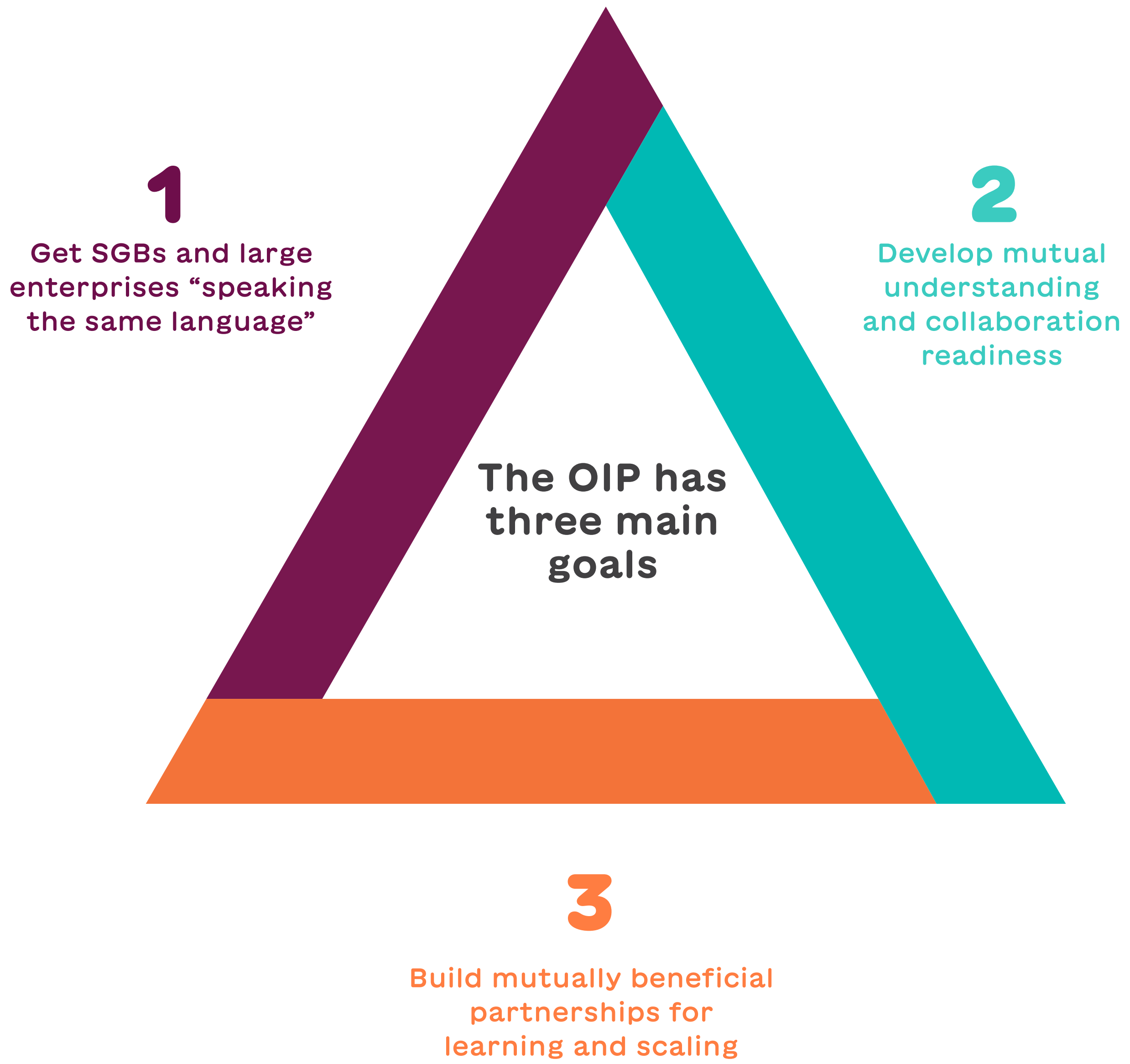
ISO running an OIP



The Open Innovation Program: A framework for collaboration

This OIP provides a framework for ISOs to support collaboration and partnerships between SGBs and large enterprises. This framework is not prescriptive in format or structure; ISOs can adapt it to suit their current programing, budgets, and challenge landscape. And although it is designed for ISOs, the OIP is an open-source model that can be used by all players in the innovation ecosystem to collaborate. The OIP has three main goals:

1. Get SGBs and large enterprises "speaking the same language"
2. Develop mutual understanding and collaboration readiness
3. Build mutually beneficial partnerships for learning and scaling



Challenge-focused and customisable

The OIP brings ecosystem players together through a challenge approach: identifying organizational or sectoral challenges that can be addressed with market-ready solutions. It involves working with large enterprises to uncover actionable innovation challenges, and identifying the pool of SGBs who are best positioned to tackle these challenges.

Importantly, however, an OIP is not a short-form innovation challenge or a hackathon. It's an intensive year-long program that should be offered by ISOs as a follow-on to other programs – both their own and others within the ecosystem. However, in the case that a longer program is prohibitive or funders/partners require a shorter commitment, ISOs can adapt the OIP model to suit their needs.

Sector specialisation

It's likely that your program will be focused on innovation within a certain sector. The sector specialisation may be informed by the large enterprise you bring on board as a partner (who may also be the funder of the program), or by a development funder, such as GIZ. For example, the GIZ Make-IT Africa initiative aims to support emerging sectors with high potential for social and environmental impact, and going forward, it will likely be focused on GreenTech, BlueTech, and Smart Cities when funding OIPs.

Since these sectors are relatively new, your hub may have limited experience with SGBs and large enterprises in these industries. You should therefore work closely with the funder to understand the sector and map potential partners and recruitment channels (as we will discuss in greater detail later). Leverage their networks to assist in designing and running the program.

GIZ's *Hub Specialisation Playbook* has identified 10 success factors that an ISO should build out to become a leader in a specific sector:

- Understanding the need and market demand for sector specialisation
- Leveraging your strengths and expertise
- Developing and implementing a specialisation strategy
- Skilling your team for sector specialisation
- Securing funding and partners for specialisation
- Designing and developing sector-specific program content
- Build sector networks and expert pools
- Develop high-quality pipelines
- Measure impact in the sector
- Develop the ecosystem for long-term success

Collaboration, not disruption

While it's easy to start thinking of innovation as a synonym for disruption in the current entrepreneurship environment, these are two very different things. The aim of the OIP is not to find the tech startups that will become the disruptors of tomorrow, or unearth disruptive technologies for other organizations to exploit. **The aim is to find the small and growing businesses who are serious about joining the existing value chain with solutions that use technology to target very specific industry problems.** This is why the OIP is focused on either identifying SGBs that are collaboration-ready or enhancing collaboration readiness within the ecosystem.

The OIP Theory of Change

When embarking on a new program that aims to create impact, it is important to create or understand the theory of change. A theory of change explains how the program activities – the specific actions and interventions you are planning – will translate into outcomes in the short, medium, and long term. The generalised theory of change for the OIP connects the core elements of the program with the long-term goal of ensuring SGBs in sub-Saharan Africa make significant contributions to the economy through partnerships with large enterprises. Depending on the scope of your program and your ecosystem dynamics, you may need to adapt this theory of change. Read more in Chapter 6 on evaluating and reporting.

Having a clear and logical theory of change with focused outcomes is also a critical aspect of measurement and evaluation (M&E). It will help you understand what success on your program looks like and how to measure it, so it's important to understand your theory of change from the beginning.

A suggested monitoring and evaluation approach and template is included in chapter 6 of this toolkit – jump ahead to view it.

Activities

- Recruiting partners
- Selecting SGBs
- Partnership matchmaking
- Mentorship from large enterprise partners
- Learning workshops or coursework from ISOs
- Coaching from ISOs
- Knowledge exchanges among ecosystem players
- Partnership pitch sessions

Short-term outcomes (~1 year)

- SGBs have a better understanding of their problem and market
- SGBs understand how to work in collaboration with partners
- SGBs have skills and knowledge to develop new/more partnerships
- Large enterprises understand how SGBs can solve their problems

Medium-term outcomes (~2-3 years)

- SGBs have access to market via partnership
- SGBs have new partners, or more paratnerships
- Large enterprises are deriving value from SGBs partnership
- Large enterprises have new SGBs parterners, or more partnerships

Long-term outcomes (~10 years)

- SGBs in sub-Saharan Africa are significantly contributing to the economy through successful partnerships with large enterprises

The OIP Framework

GIZ's Make-IT Initiative has funded four ISOs to run pilot open innovation programs since they first conceptualised the program in 2019. The program framework used in this toolkit is a revised framework for the program (2023) that accounts for a longer timeframe for delivery and redirects focus and resources to preparing the SGBs (and large enterprises) for collaboration that can ultimately lead to mutually beneficial partnerships. The suggested OIP framework for ISOs is a year-long journey with five distinct phases.

Suggested year-long OIP journey for ISOs

Securing program partners & challenge definition	→	Recruiting & selecting SGBs	→	Onboarding & challenge introduction	→	Learning activities, mentoring & coaching for collaboration	→	Evaluation & reporting
~ 3 months		*~ 2 months*		*~ 2 weeks*		*~5.5 months*		*1 month +*

Using the toolkit to design your open innovation program

Securing program partners & challenge definition	Recruiting & selecting SGBs	Onboarding & challenge introduction	Learning activities, mentoring & coaching for collaboration	Evaluation & reporting
- 3 months	*- 2 months*	*- 2 weeks*	*5.5 months*	*1 month +*

PROGRAM ACTIVITIES

Securing program partners & challenge definition	Recruiting & selecting SGBs	Onboarding & challenge introduction	Learning activities, mentoring & coaching for collaboration	Evaluation & reporting
Ecosystem mapping & diagnostic	Determine selection criteria	Startup onboarding: Goal setting, partner mapping	LEARNING ACTIVITIES Content presentations/ workshops/ panel discussions/ fireside chats	Program completion survey
Partner mapping & value proposition	SGB recruitment campaign	Stakeholder matchmaking and challenge understanding	COACHING	Report
Partnership discussions & finalisation	SGB selection & communication	Mentor & coach matching	MENTORSHIP	Post-program survey (1 year post program)
Problem/challenge definition with stakeholders		Baseline survey	TECHNICAL SUPPORT	Report amendment
			PITCH DAY	

TOOLKIT

CHAPTER 1 & 2	CHAPTER 3	CHAPTER 3 & 4	CHAPTER 5	CHAPTER 6
Templates, Tools & Resources	**Templates, Tools & Resources**	**Templates, Tools & Resources**	**Templates, Tools & Resources**	**Templates, Tools & Resources**
OIP Theory of change (pg 16)	SGB maturity assessment (pg 50)	Program infrastructure check-list (pg 65)	Designing your program based on ecosystem diagnostic (pg 78)	Customise your theory of change (pg 100)
Ecosystem diagnostic template (pg 25)	Application process design (pg 53)	Onboarding program design (pg 66)	Core program components (pg 81)	Selecting indicators (pg 103)
Large enterprise sales & SPIN framework (pg 32)	Recruitment & selection resource roundup (pg 60)	Setting expectations and responsibilities (pg 70)	Learning activities (pg 82)	When to measure (pg 106)
Value propositions for large enterprises (pg 34)		Assumption test (pg 74)	Coaching (pg 88)	Measurement tools (pg 107)
Persona template (pg 35)		Exercises for onboarding program (pg 75)	Mentorship (pg 90)	Survey design (pg 108)
Partner development canvas (pg 38)		Resource roundup onboarding (pg 76)	Coaching vs mentorship (pg 92)	
Crafting challenge statements (pg 41)			Networking (pg 94)	
Resource roundups: partnerships & challenge statements (pg 20 and 46)			Pitch session (pg 96)	
			Program design resource roundup (pg 97)	

1.3 Managing the OIP

As facilitators of OIPs, ISOs are responsible for managing the entire program from planning to implementation and reporting. This entire toolkit contains resources, guidelines, and examples that ISOs can use for managing these different phases. But before you get started, there are a few things you should keep in mind about the overall management approach.

TOP TIPS: MANAGING YOUR OIP

Don't reinvent the wheel. Most of the back-end machinery that will make your program successful (e.g. application forms, surveys, mentor guides) already exists, so don't waste time and energy recreating them. Make use of the templates and resources aggregated in this toolkit, starting with the ones in the Resource Roundup at the end of this chapter. In particular, the Launch League Program Management Resources are great for boilerplate resources.

But don't copy-paste. Many of your participants will have participated in entrepreneurship training or corporate mentorship before. But as this toolkit will show again and again, this program can deliver unique value when ISOs design in line with the particular needs of the ecosystem, and with the primary goal of supporting collaboration readiness between SGBs and large enterprises. Invest your energy in learning about your partners and ecosystem, and customising the program components accordingly.

Take the long view. Another recurring theme of this toolkit is that ISOs should design their program with an eye to the future, and a sense that their OIP can change and adapt over time, in step with their ecosystem. In a way, ISOs must adopt their own entrepreneurial mindset and approach their first program as a learning opportunity that they can use to continually support collaboration between SGBs and large enterprises. This might mean setting more realistic program goals or dramatically modifying program content, trusting that you will build toward a more ideal OIP in future.

Expect to iterate. Designing your program will be an iterative process. Start designing your program content before you approach large enterprises. Work with your partners to make critical program decisions, finalise the program before recruiting SGBs, and then prepare to adjust the program based on information from your onboarding system. Before you start, have a look at the core program content in Chapter 5 to see where you're headed.

RESOURCE ROUNDUP: PROGRAM MANAGEMENT

Before we get started with the best practices for running an OIP, you may find it helpful to review some general guides to innovation program management.

- Theory of Change from Sopact: This guide provides an in-depth look at the theory of change concept, how to develop one, and how to use it for impact management.
- SAIS Challenge Guide from Viridian and SAIS: This guide provides an overview of how to run challenge competitions of various scales.
- Accelerating Women Entrepreneurs from GIZ: This resource gives an overview of how to run programs that best support women entrepreneurs, particularly in the Global South.
- **Hub Specialisation Playbook** by Make-IT in Africa: This playbook contains tips, templates, and examples for hubs to run sector-specialised programs for their ecosystem. This will be available on the Make-IT in Africa website by the end of 2023.
- Program Management Resources from Launch League: This is a collection of downloadable templates and guides for managing an innovation program, including application forms, Gantt charts, and survey templates.
- AfriLabs Academy from AfriLabs: This platform provides courses for African hub managers, including program management and creating partnerships.

CHAPTER 2

Securing program partners & challenge definition

2.1 Before you start

Although the ultimate goal of an OIP is to support partnerships that will promote SGB success, this may be a longer-term goal or a shorter-term goal, depending on the collaboration readiness of the large enterprises and SGBs in your ecosystem. A successful OIP must be designed to the level of collaboration readiness of the participants.

Collaboration openness describes the open-mindedness of organizations to new ideas and ways of working with external partners. Cultivating this openness among both SGBs and large enterprises – by educating about open innovation, promoting learning cultures, and developing leadership capabilities – is vital to create a baseline for open innovation in the future. Promoting collaboration openness is an appropriate program goal for OIPs in less mature ecosystems where early-stage startups are plentiful, SGBs are few, and partnerships are rare.

Collaboration readiness connotes a higher level of maturity where stakeholders are not only open to working with others, but prepared with the requisite internal structures, tools, knowledge, and behaviours to successfully collaborate. Creating collaboration readiness is an appropriate program goal for ecosystems with more mature startups and SGBs that are interested in scaling, and with large enterprises that are active in their ecosystems.

Collaboration in the form of a formal partnership agreement of some kind is only possible when both large enterprises and SGBs have a high level of collaboration readiness, and their problems and solutions are aligned. Facilitating collaboration is the best-practice OIP goal and is well suited for mature ecosystems where there's a substantial base of SGBs and large enterprises with partnership experience.

COLLABORATION IN ACTION: UNDERSTANDING AND ADJUSTING YOUR PROGRAM GOALS

The Fight for Access Accelerator (FAA), funded by Reckitt and hosted by Yunus Social Business is an excellent example of how ISOs can take a long view of open innovation and build toward successful partnerships over multiple program cycles.

Yunus Social Business has a learning culture prioritising information gathering, sense-making, and adaptation. This mindset extends to their accelerator programs for social businesses, where they tailor the program design to the pool of businesses in the different international hubs they work in.

The 2023, FAA with Reckitt was run in multiple innovation ecosystems in Brazil, Indonesia, and South Africa. For Yunus Social Business, based in Brazil, the 2023 South African program represented the first accelerator of its kind in Africa and in a context where Yunus Social Business did not have a presence. They, therefore, approached this program cycle with an eye on the next cycle, adjusting their goals for the accelerator in accordance with the local needs.

To gauge the maturity and needs of the South African ecosystem, Yunus Social Business worked closely with local ISOs, relying on their expertise and networks to learn about the landscape of social businesses that might participate in FAA. This scoping exercise, a standard part of Yunus Social Business's process, informed their recruitment strategy, the program training content, and the program metrics, which are highly structured for replication but also customisable for local contexts.

At the same time, Yunus Social Business leverages their data collection efforts to support their relationship with corporate partners. They continuously bring the evidence of their ecosystem work to partners to manage their expectations for the accelerator, clarify the program goals, and maintain buy-in.

By bringing all stakeholders on the learning journey and facilitating communication between partners, Yunus Social Business lays the foundation for successful collaboration where the corporate goals are aligned with the capabilities of the local businesses. Yunus Social Business implements learnings between programs from one ecosystem to the next. Meanwhile, the graduated FAA participants are equipped to continue a journey of collaboration, either with each other or with new partners.

yunus social business

As Yunus Social Business Senior Director Sergio López Ramos explains, “At the end, we can say that we have also trained these leaders, so they will continue our work after we leave.”

Assess your ecosystem

Partnerships between public- or private-sector large enterprises and SGBs depend on many factors that relate to the maturity and collaboration readiness of your local innovation ecosystem. Before you approach potential partners, conduct a simple Ecosystem Diagnostic to see at what level you have the most leads for both large enterprises and SGBs. This will help you determine whether you're designing a program for collaboration openness, collaboration readiness, or collaboration. All your program planning and design will centre on this Ecosystem Diagnostic, so be ready to return to it again and again.

Photo by Christina on Unsplash

Collaboration Ecosystem Diagnostic Template

TEMPLATE

How to use this template: This is a diagnostic tool that you and your team can use to understand the collaboration readiness of large enterprises and SGBs. Print this out and categorise your ecosystem stakeholders to inform your program design.

COLLABORATION	POTENTIAL LARGE ENTERPRISES	POTENTIAL SGBs	PROGRAM DESIGN
Best Practice	*Has established SGB partnerships and a dedicated innovation department or strategy*	*Existing partnerships with large enterprises*	GOAL: Collaboration/ partnership
Intermediate	*Some previous engagement with SGB and innovation strategy*	*Post revenue, appropriate model for large organization partnerships and some partnership conversations have taken pace*	GOAL: Collaboration readiness
Baseline	*No existing innovation department/strategy or SGB partnerships*	*Post revenue, appropriate model for large enterprise partnerships but no partnerships*	GOAL: Collaboration openness

After mapping potential large enterprises and SGBs, you should have a good idea of which ecosystem stakeholders you might engage. Start by categorising the large enterprises you're likely to partner with in the left column. Then, identify some examples of the SGBs in your ecosystem that you might include in your program, and categorise them in the right column. You're looking for stakeholders that are at the same level of collaboration readiness so that you can design your program at the appropriate level.

BASELINE: Program goal = Collaboration openness

SGBs and large enterprises in your ecosystem have little to no experience with these types of partnerships or innovation projects.

If this is the case, then actual partnerships may be a far longer-term goal and you should focus on developing an openness for collaboration. Your program can therefore focus on SGBs and large enterprises developing an understanding of the value of collaborating, and what skills, processes, and activities need to be developed to support and maintain collaboration. This represents the minimum, baseline goal for an OIP. Where possible, present examples of successful collaborations between SGBs and large enterprises.

SUCCESSFUL COLLABORATIONS BETWEEN SGBS AND LARGE ENTERPRISES

MPost Posta Mkononi

MPost is a Kenyan startup that addresses the problem of unfixed or unregistered addresses, which is common in much of Africa. By using mobile phone numbers, MPost creates an efficient way to deliver products to people. They supply corporates, including Uber, Posta Kenya, and the United Bank of Africa, and have been able to expand their customer base and streamline their logistics with MPost.

paga

Paga is a Nigerian business that provides an efficient way to make payments, including bills, via mobile phones. They work with numerous corporates, including JOS Electricity Distribution, Swift Networks, and DStv. Through these relationships, Paga increases their market penetration and the corporations streamline their payment systems.

copia Making Living Easier Every Day

Copia Global is a Kenyan social enterprise that delivers goods to Africans who live in rural or otherwise hard-to-reach locations. They've partnered with the payments company Cellulant, whose digital technology allows Copia to improve the reach, efficiency, quality, and safety of purchases. The partnership allows for diaspora transitions, thereby opening new channels (diaspora transactions), and increasing sales for Copia and Cellulant.

wetility

Wetility is a South African business that offers hybrid energy solutions to households and businesses. After meeting with Standard Bank, Wetility became a supplier for the bank's LookSee platform, which provides tools to help households be more cost efficient, including by lowering energy costs. The partnership helps Wetility increase its market penetration. Meanwhile, Standard Bank diversifies their supplier base for their solar-loan strategy through adding more services on LookSee, which supports customers in saving money and ultimately securing repayments.

INTERMEDIATE: Program goal = Collaboration readiness

The SGBs and large enterprises have some experience in thinking about innovation partnerships.

In this case, your program can be more concerned with getting the SGBs and large enterprises ready to work together. You can focus on shaping value propositions, understanding the sales and procurement process, and thinking about what a pilot might look like and the financial model for this. Most OIPs will likely fall into this category.

BEST PRACTICE: Program goal = Collaboration

The SGBs and large enterprises understand the value of such partnerships and have a good understanding of the risks and opportunities.

In a mature innovation ecosystem, a partnership between SGBs and large enterprises is a likely possibility if you get your recruitment and selection right (i.e. well-crafted challenge statements, well-suited solutions). In this case, your program may be more focused on product innovation and piloting. This will likely include coaching on negotiation skills and legal advice. This is the best practice for an OIP.

COLLABORATION IN ACTION: THE IMPACT OF SPECIALISATION ON PROGRAM GOALS

In some instances, ISOs will prioritise a strategic ecosystem goal over collaboration readiness level. On the OIP for Uganda, StartHub worked directly with GIZ and Make-IT Africa, which wanted to focus the program on Smart Cities, one of GIZ's priority sectors. As the sector for Smart Cities is in its infancy across Africa, SmartHub knew that this specialisation would narrow their applicant pool to a smaller subset of less mature startups. In other words, the collaboration readiness of their ecosystem in this sector was low. They thus designed a collaboration readiness program with the more reasonable goal of facilitating a co-creation process for future partnerships.

Accordingly, StartHub also adjusted their recruitment approach. Rather than sending out an open call, they head-hunted startups that they thought would be a good fit for the program: those with a MVP in the areas of property, data, or public services tech, and an interest in scaling. The alignment of program goals, recruitment strategy, program content, and M&E is a recurring theme in the OIP toolkit, and it starts with diagnosing your ecosystem's collaboration readiness.

2.2 Finding partners

As we saw in Chapter 1, the OIP is a challenge-focused program. Though ISOs are well positioned to identify industry problems for entrepreneurs to tackle, OIP challenges must be directly informed by the partner organizations. For collaborations to be mutually beneficial, they need to centre on real, consequential problems that large enterprises experience and which SGBs are equipped to solve. Large enterprises therefore need to be brought in as OIP partners early in the process.

Depending on your program goals, funding, ecosystem maturity, and sector specialisation, you may be engaging multiple large enterprises as partners on the program. The standard OIP model makes provision for one large enterprise partner who will be actively involved in the design and delivery of the program. Although this may sound preferable to juggling the needs of multiple partners, in reality it may prove difficult if large enterprises have never engaged with ISOs or SGBs before. This section will explore how to identify, engage, and communicate with potential partners to manage their expectations and secure their participation in open innovation.

Build relationships, starting yesterday

Building partnerships with large enterprises takes a long time. Often, there are many layers of management you need to navigate and this is a slow process, particularly if the organization lies in the bottom left-hand quadrant of the Ecosystem Diagnostic Tool (i.e. they don't have a dedicated innovation department or experience working with entrepreneurs). While the OIP model allows for three months to develop and confirm partnerships with large enterprises, it could take far longer than this if you don't have existing relationships.

ISOs need to leverage their connections to different types of ecosystem players to find the organizations that would benefit most from open innovation and are most willing to collaborate with SGBs.

TOP TIPS: BUILDING A PARTNER NETWORK

The best time to build relationships with potential partners and collaborators is not the moment when you need them most. ISOs need to continuously generate leads and make connections with innovation decision-makers in key sectors and nurture those relationships throughout the year – whether they're planning an OIP or not. Some great ways to do this:

- **Host workshops.** Invite companies and institutions to participate in workshops about collaboration, SGB partnership, or open innovation. While you're sharing information with them, use the time to meet more stakeholders and learn about their needs.
- **Show up.** Attend webinars, conferences, or roundtables hosted by large enterprises in the private and public sector in areas of interest to better understand their needs and appetite for partnerships.
- **Lean on networks.** Leverage your existing funders and partners (such as GIZ) to make introductions to their network of large enterprises.
- **Don't put all your eggs in one basket.** Nurture multiple relationships at a time, even when one connection seems particularly promising.
- **Set KPIs.** Make partner engagement an explicit objective for team members and set goals in terms of number of engagements. Remember, you need to have many conversations just to get a few partners.

COLLABORATION IN ACTION: ATTRACTING AND FINDING COLLABORATION CHAMPIONS

Often, finding partners who are a good fit for your program comes down to individuals within organizations. For instance, in both the cases of Moka Smart City and the Fight for Access Accelerator, it was a single executive within a partner organization who championed the partnership and made it possible. The FAA origins are particularly instructive for how ISOs can position themselves to attract partners.

As a long-running foundation dedicated to tackling the issues of poverty and climate change through impact-driven enterprise, Yunus Social Business is widely recognised as a capable and experienced partner for finding and scaling grassroots social businesses. Their mission is to “make social businesses bigger and make big businesses more social” by working with large corporate partners and small social enterprises.

This approach to social responsibility – the focus on enterprise over philanthropy – resonates with many would-be corporate partners, as it did with Reckitt. In particular, Reckitt’s head of CSI had been following Yunus Social Business’s work closely and approached the organization about collaboration in 2019. Internal barriers within, followed by the disruptive Covid-19 pandemic, delayed the project. Still, the commitment of Reckitt’s CSI officer to Yunus Social Business’s program kept the project alive until the other pieces fell into place in 2021.

There are two key takeaways from the FAA. Firstly, ISOs with a strong identity, as defined by their values and approach to enterprise development, can attract partners with similar values who already understand the value proposition and want to work with you. Every program cycle is an opportunity to communicate your unique approach to potential partners and build a strong brand of collaboration that will attract large enterprises. Leveraging the brand of a funding partner, such as GIZ, or other institutional collaborators can bring your work to the attention of potential partners.

Secondly, ISOs need to think longitudinally about their engagements with large enterprises. Seeds planted today might only germinate in a few years, but you don’t know which ones will flourish into successful programs. You must nurture all your relationships in the present with an eye to the future.

yunus social business

Map the partner landscape

Ecosystem mapping is a helpful exercise that ISOs can use to explore all the potential partners in the system. The objective of this mapping exercise is to identify all promising connections and assess their partnership potential for an OIP. The final map will show you the big-picture partner landscape in your innovation ecosystem and will help you to shortlist the partners to approach for the OIP. This might be useful to do before an Ecosystem Diagnostic, so that you can focus your assessment on a particular subset of large enterprises.

TOP TIPS: MAPPING YOUR ECOSYSTEM

Work in groups. Make this a team exercise, pooling knowledge from a broad cross-section of your team.

Start with individuals. Start by identifying the long list of people that you have real connections to in corporate innovation.

Assess collaboration potential. Consider the collaboration and innovation readiness of the contact and their company, and plot the company accordingly (high potential companies closer to the centre).

Look for symmetries. Tease out values, interests, or goals that you and the company may share and can integrate into an OIP.

Map the sector. Use the sector or challenge area of the company as an organising principle. For each company, identify different types of partners within the same sector or value chain, and map their relationships to one another using lines or arrows. This process might turn up other points of contact to strengthen the connection, understand the challenge area, or find other partners.

Look for other connections. Next, identify other organizations or intermediaries within the innovation ecosystem (other ISOs, investors, or coaches) who may have connections to corporate partners.

2.3 Approaching and securing partners

Once you have a clear picture of which partners you want to approach, it's time to start working on your pitch. The better you understand how to secure big partners, the better you can coach your community. The principles that we cover in this section will also apply to SGBs when they form partnerships, so plan on reusing some of these materials and concepts in your program.

Put on your "sales hat"

Before you can turn connections into partnerships, you will need to put on your "sales hat" and brush up on your B2B sales know-how. Let's start with some basics you should consider as you begin to approach large enterprises:

1. **Priorities differ.** Large enterprises often have priorities and decision-making processes that are different to those of household consumers. You need to make the case for the value of partnership to their organization, not just to their end users.
2. **Things take time.** They usually take a longer time to sign off on decisions owing to their large, hierarchical nature. ISOs should prepare themselves – and their SGBs – for long sales cycles involving multiple people and a potentially onerous process to get a signed partnership.
3. **Expect risk aversion.** Employees at large enterprises are wary of making risky decisions which could result in perceived poor performance. As a result, SGBs need to prove the reliability and quality of their product/service up front.
4. **Find the decision-makers.** Decisions are made by people, not companies. You need to understand the different individual stakeholders you'll be working with, what drives them, and the value your program can deliver for them.

TOP TIPS: MAKING THE SALE

There are two helpful sales methodologies that will put you on the right path for clinching a B2B deal: SPIN and the 3 Ds. Here are a few highlights from these approaches:

- **Expect a multiphase conversation.** You won't get partners on board with your program in a single conversation; you'll have to make your argument over time and based on your growing understanding of the partner. The SPIN methodology captures the different phases of conversations you should have with the partner to help them understand how your program can help them solve their problems.
- **Ask (lots of) questions.** SPIN emphasises the importance of asking questions to help you uncover partner needs, and help the partner see the value in your solution. These questions should revolve around: the customer's *situation* (e.g. an organizational capacity challenge), what *problems* your program solves for the customer (e.g. facilitating access to innovative partners), the *implications* of the problems you have uncovered for the customer (e.g. poor customer experience due to outdated systems), and the *need-payoff* of how your program will help the partner (e.g. SGBs could design a better system for them).
- **(Co-)design with your partner.** Although your program design comes a bit later (see Chapter 5), you already need to be thinking about it in your partner engagements, which will actually help with the sales process. This is where the 3 Ds methodology is useful. Partners need to see that you can offer a program that will be useful for their own agendas. Once you understand the partners' needs (*discover*) and the underlying problem (*diagnose*), you can *design* a program that will suit them. You can even build a co-design process into your sales process to implicitly get them on board with the program.
- **Read more.** Go deeper on *Spin Selling* and *Mastering the Complex Sale* with the books in the Resource Roundup.

S

SITUATION

Situation questions help you understand the buyer's current situation. The goal is to gather information, such as:

- What do the client's current processes look like?
- What tools are they already using?
- How often do they use them?

P

PROBLEM

Problem questions help illustrate the different problems your product solves for your client. Some examples are:

- Do you feel that inter-team communication is as good as it can be?
- How does this impact stakeholder buy-in?

I

IMPLICATION

Implication questions hone in on the problems you've discovered, showing the client why they need to be solved:

- How much time is wasted on inefficient communication each week?
- How much more could your team achieve each week without those time sinks?
- Have communication problems ever delayed product rollout?

N

NEED-PAYOFF

Rather than just telling your client how your product or service can address their pain points, need-payoff questions lead your customer to those conclusions on their own:

- Would a comprehensive product management tool increase stakeholder buy-in?
- Would that be valuable for your team?

Adapted from Neil Rackam

COLLABORATION IN ACTION: PRIORITISING CO-CREATION

Co-design can be an essential element of the partner engagement process for open innovation, requiring participants to continually develop workable, real-world solutions. BongoHive is an example of an ISO that prioritises co-creation with their large enterprise partners across their programs.

Their base in Lusaka is the biggest innovation hub in Zambia but is still a growing ecosystem. They rely on collaboration with large enterprises to help entrepreneurs mature and become more market ready. Part of that maturation process involves training entrepreneurs to become more user centred. BongoHive does this by engaging industry members and ecosystem stakeholders to understand sectoral pain points better and design their program – from challenge statements to program content – accordingly.

BongoHive's organizational structure, composed of functional teams, supports this approach of co-creation at the intra-organizational level. They have an Innovation Team that manages innovation programs, including the Open Innovation Zambia program, from start to finish.

They're responsible for introducing startups to concepts of human-centred design with design sprints, which orients startups to co-creation processes. If they need to prepare program participants with core business learnings, they pull in their Entrepreneurship Team to provide coaching and training. For programs designed for more early-stage startups, their Tech Team can provide technology-based assistance to support product prototyping.

Even if your program is designed for a nascent sector or ecosystem, prioritising co-creation in your ISO, your partner interaction, and your program content will position SGBs to be more customer-centred in future. This will prepare them to be stronger partners to large enterprises and participate in open innovation, inside and outside of your OIP.

BongoHive

Know your value propositions

Part of understanding the motivations of your potential partner organizations is being able to articulate the value proposition of your program. There are several strategic value propositions for large enterprises to work with SGBs related to internal organizational objectives, product development, market development, or various combinations of these. Knowing which value propositions speak to which companies is key to: (1) find inroads to decision-makers who are open to collaboration and (2) design a partnership model that will suit their goals.

TOP TIPS: IDENTIFYING VALUE PROPOSITIONS

For every potential partner you want to approach, create a sales persona to tease out their goals, frustrations, fears, and actions on a granular level. Again, make this a group exercise to maximise the learning. Consider the following:

- **Focus on the Big Three.** Most of your partner contacts are likely to come from one of three departments: innovation, marketing, or corporate social responsibility. As a first screening, find out more about the department goals, KPIs, and strategy to determine if your program is a possible fit for their activities.
- **Dig into individual pain points.** Ultimately, you'll be approaching individuals with your proposal for an OIP. This means you need to understand the individual needs of your contact and their team, and how their pain points connect with the strategic needs of the company.
- **Make more connections.** Can you see the alignment between the individual pain points, the corporate value proposition, and your program? If not, maybe focus on another potential partner, or reach out to people from other departments who may be a better match for collaboration.

Persona template

TEMPLATE

How to use template: This is a persona exercise usually used for profiling customers of B2C and B2B products/services. Print this template to profile individual decision-makers or organizations by analysing their challenges, expectations, motivations, and influences. For B2C personas, make sure you further contextualise the person based on their role in the organization – more on this below.

NAME:

THEIR SOCIAL STYLE:
Analytical, Driver, Expressive, Amiable (read more here)

DESCRIPTION OF PERSON:

ROLE/RESPONSIBILITY:
B2C: The role a person takes in their community/family/work, such as their job.
B2B: The role the person has in the company and their associated responsibilities. Are they in charge of their own budget, or do they need sign off?

REWARDS/OUTCOMES:
B2C: The rewards which the person wants/expects when using your product/service.
B2B: The rewards which the person and the company want/expect when using your product/service.

CHALLENGES:
B2C: The challenges your product/service aim to solve for the person.
B2B: The challenges your product/service aim to solve for the company and person.

OBJECTIONS/RISKS:
B2C: The reasons the person may not choose your product/service, or may cease using it.
B2B: The reasons the person and company may not choose your product/service, or may cease using it.

Also fill if B2B

COMPANY NAME:

DESCRIPTION OF COMPANY:

DIRECT INFLUENCES:
B2C: Family, friends, etc.
B2B: Manager, boss, suppliers of complementary products, sales management.

DISTANT INFLUENCES:
B2C: Market trends, social media, news, etc.
B2B: Economic activity, regulations, technological innovations, etc.

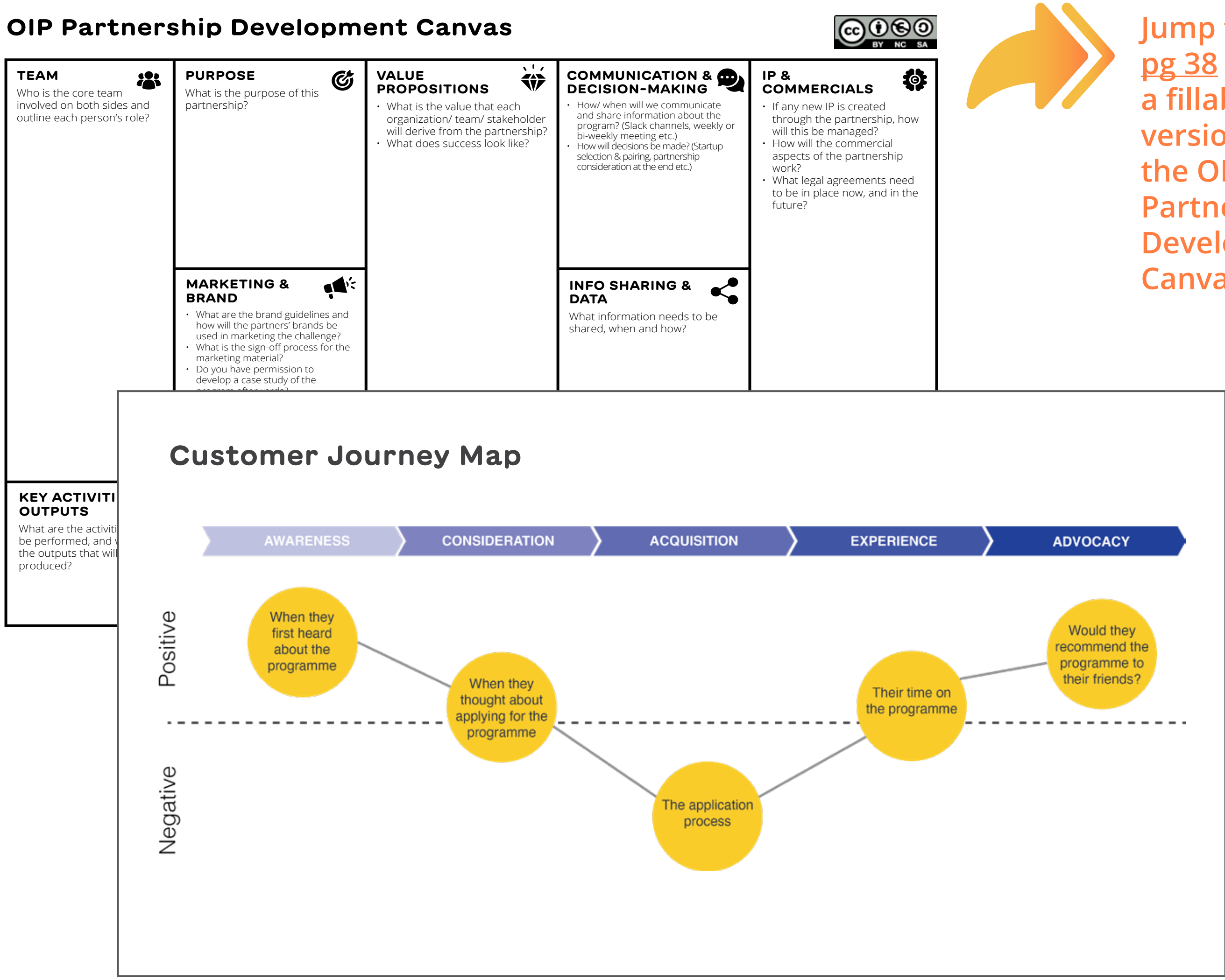
KEY ACTIONS:
B2C: Compare what happens if the person does not use the product/service with what happens if they do use the product/service.
B2B: Compare what happens if the person and company does not use the product/service with what happens if they do use the product/service.

Make the pitch

You've identified some large enterprises that seem open to collaboration, you have a contact at the organization, and you feel confident that you understand the organization's pain points and the value proposition of your OIP. Now you need to pitch the program to your potential partner. But communicating this opportunity to a large enterprise – however open-minded they seem – can be tricky.

Now more than ever, you need to put yourself into the shoes of individual decision-makers. Most of your partner contacts are likely to come from one of three departments: innovation, marketing, or corporate social responsibility. What will the partner journey look like for them? How will they participate and interact with the ISO and SGBs? This will differ depending on the person and their departments, objectives, and core operations.

There are multiple tools you can use to flesh out these ideas and design your pitch around, in particular the Customer Journey Map and the Partner Development Canvas.



Jump to pg 38 for a fillable version of the OIP Partnership Development Canvas

Learn more about the Customer Journey Map in Launch League's A Hub's Guide to Programme Management

TOP TIPS: USING THE CUSTOMER JOURNEY MAP AND PARTNER DEVELOPMENT CANVAS

- **Plan for multiple conversations.** You should know up front that there will be multiple conversations with your contact or the organization before you make a formal proposal. Use early conversations to learn more about them, educate them about open innovation, and manage their expectations.
- **Anticipate the moods of your partner.** A Customer Journey Map is a detailed visualisation of a long sales cycle of a product or service. You can adapt it for the OIP to identify potential friction points, possible constraints of the program design, and which program elements will excite them most. By mapping partner moods at different stages, you can anticipate and be responsive to them.
- **Workshop the customer journey.** Using a template like the one provided in the Resource Roundup, sketch out the customer journey on a large whiteboard and use sticky notes for you and your team to brainstorm what will happen at each phase of the customer journey, and how you will manage this.
- **What about you?** An important element of the customer journey analysis is the question: what are you doing internally to address or mitigate the shifting moods of the relationship? This links to the ISO's own collaboration readiness to work with large enterprises through more complex projects. Ensure that you have a response for the different issues you identify.
- **Engage the partner in the sense-making process.** Developing a partnership with a large enterprise could take a long time and involve multiple people at the organization. The Partner Development Canvas is a tool that can support conversations with a large enterprise in the partnership development stage. Use it to help your contact to understand who may need to be involved from their team, what the program requires, and what their goals are. By filling this out together, you are implicitly forming a partnership and making them co-designers.

Partner Development Canvas template

How to use this template: This is a tool that can be shared with a potential partner to discuss the possible terms of the partnership and ways of working. The canvas has nine blocks, and each should be populated through conversations or workshops with your partner. These areas can also be considered in the legal agreement.

TEMPLATE

TEAM

Who is the core team involved on both sides and outline each person's role?

PURPOSE

What is the purpose of this partnership?

MARKETING & BRAND

- What are the brand guidelines and how will the partners' brands be used in marketing the challenge?
- What is the sign-off process for the marketing material?
- Do you have permission to develop a case study of the program afterwards?

VALUE PROPOSITIONS

- What is the value that each organization/ team/ stakeholder will derive from the partnership?
- What does success look like?

COMMUNICATION & DECISION-MAKING

- How/ when will we communicate and share information about the program? (Slack channels, weekly or bi-weekly meeting etc.)
- How will decisions be made? (Startup selection & pairing, partnership consideration at the end etc.)

INFO SHARING & DATA

What information needs to be shared, when and how?

IP & COMMERCIALS

- If any new IP is created through the partnership, how will this be managed?
- How will the commercial aspects of the partnership work?
- What legal agreements need to be in place now, and in the future?

KEY ACTIVITIES & OUTPUTS

What are the activities that will be performed, and what are the outputs that will be produced?

KEY INPUTS

What resources will be required? (time, facilities, capital)

Clarify the terms of the partnership

Once you've sold one or more large enterprises on open innovation, there are several ways for them to partner with you on your OIP. A critical step in your program design process is clarifying the role they will play and what resources they will contribute. There's a set of minimum contributions that large enterprises should make related to the program design (challenge definition, participant selection, and marketing). If you have a sector-specialised program built around a particular partner or funder, you'll likely need a great deal of support and input from them throughout the OIP. But depending on their level of collaboration readiness, large enterprises may not have the resources or the experience to be a hands-on partner with the program delivery. In this case, ISOs must source other stakeholders to fill critical aspects for the program, such as funding, mentoring, and other support.

POSSIBLE PROGRAM CONTRIBUTIONS FROM LARGE ENTERPRISES

- Defining the challenge for SGBs (sector, particular issues)*
- Marketing the program*
- Selecting SGBs for the program*
- Funding the program itself
- Funding or deals for SGBs
- Employee mentors
- Technical assistance (finance, legal)
- Infrastructural resources (software, technical tools)
- Networks (value chain, technical experts, investors)

*These are essential contributions for open innovation partners

ISOs should start the conversation on expectations and responsibilities early. An ISO and large enterprise should create a formal memorandum of understanding (MOU) – also known as a letter of intent (LOI) – to set these expectations. ISOs will also likely need to sign non-disclosure agreements (NDAs). The large enterprise will likely have their own templates for you to sign, but if you need to develop your own, check out the templates in the Resource Roundup. When using generic templates like these, you should always read through them carefully to ensure that they make sense for your context and the nature of the agreement. Add any references to local data protection or other relevant legislation.

In these negotiations, ISOs should have a clear wishlist of what they would like from the large enterprise, which means they must already have an idea of the program content (see Chapter 5.2 for an overview of the core content). Take this opportunity to remind large enterprises of the value propositions that can be achieved if they're more involved in the program and that they can offer different forms of support:

- social responsibility and impact
- brand building
- developing innovation mindset
- optimising operations with external solutions
- creating new products and services
- team engagement and talent development

Jump to Chapter 4.2 for more on partner expectations

COLLABORATION IN ACTION: WHEN PARTNERS ARE ALSO FUNDERS

When the large enterprise you're approaching for partnership is also the program funder, different drivers will likely influence the program goals and how they use the program. For instance, on programs where corporate partners were also funding the program, BongoHive found that the corporate would follow up with the participating startups after the program, continuing the collaboration journey. With more skin in the game, large enterprises may be more likely to deliver on the ultimate goal of open innovation: long-term partnerships.

Partners may also be more willing to share other resources if they invest in an OIP. Reckitt was both the corporate partner and the program's funder in the Fight for Access Accelerator case. Although Yunus Social Business was in charge of managing the program, the Reckitt fingerprint was unmistakable across all aspects of the program. The challenge statements were 100% aligned with Reckitt's corporate mission and the needs of the WASH sector. Marketing campaigns on the Yunus Social Business website, Reckitt website, and social business platforms put their sector, brand, and impact goals at the forefront. Their employees participated as program mentors and provided seed funding to all six participating businesses.

Securing this kind of deep partnership, where there are many ties between ISO and the partner, is ideal for open innovation as it ensures ecosystem collaboration by definition and makes large enterprises more invested in collaboration with SGBs.

2.4 Writing challenge statements

Once your partner is on board, you need to start the process of defining an organizational problem (or several) that they'd like to address with the program. This should be a problem that an organization would like to solve to grow its market, improve internal capacity, or survive a competitive market. This problem is then transformed into a challenge statement that can be posed to SGBs for developing solutions.

Writing a strong challenge statement is an essential part of creating a successful OIP in the longer term because it allows ISOs to align SGB capabilities with the needs of large enterprises – which means both partners will get more from the interaction and likely enjoy the journey more.

A GOOD CHALLENGE STATEMENT IS:

- Derived from real, validated problems within the corporate
- Informed by multiple stakeholders
- Targeted to the capabilities of SGBs
- Highly specific

There are a few key steps you can follow to produce a strong challenge statement that will speak to the SGBs in your ecosystem.

Understand the problem

To create a strong challenge statement, ISOs must collaborate with corporate partners to uncover their internal paint points and articulate their goals. Be sure to explore a range of possible problems before narrowing your focus.

TOP TIPS: INTERVIEWING LARGE ENTERPRISES

- **Cast a wide net.** Engage people from multiple departments and teams to compile a variety of potential problems.
- **Ask the right questions.** Use a Google form or an interview to ask probing questions that clarify the problem (see sidebar for examples).
- **Find collaborators.** Prioritise problems from teams that are more open to collaboration and are positive about an open innovation process. Ultimately, cooperation will be a more important ingredient for success than having a sexy problem that is vaguely defined.

ASK THE RIGHT QUESTIONS

- Describe the problem in two or three short sentences:
- Where does the problem occur? Briefly describe the context and what activities are taking place.
- Who experiences the problem? And when? What are they trying to achieve when they come up against the challenge and what are the constraints that cause the problem to occur?
- Has research been conducted with users who experience the problem?
- Which team members are most familiar with the problem?
- Which team members benefit the most from solving this problem?
- How would you recognise that the problem has been solved?
- Has research been done to see if there are possible solutions in the market?
- Do you already have solutions in mind? If yes, what is your openness for new, potentially different solutions?
- What is the business case for solving this problem?
- What compliance/ processes/red tape may need to be considered when implementing a solution?

Pick your problem

If you engage with the partner organization, it's likely you'll have a long list of company issues. How will you choose? Ultimately, you need a problem that is wide enough to spark creativity and attract SGB solutions, but specific enough to ensure that the solutions are relevant. There are a few things to keep in mind to get this balance.

TOP TIPS:

- **Keep it simple.** Choose a problem that requires a product or service solution, not a strategy, process, or systems-level solution. You should be able to envision the *types* of solutions to the problem, while staying open-minded about the solutions SGBs will propose in practice.
- **Keep it consequential.** The problem should be important and the stakes should feel real. Success or failure must matter to both the large enterprise and the SGB.
- **Allow for experimentation.** As consequential as the problem is, it should also leave room for experimentation on the part of SGBs. The solution should not be predetermined or prescribed.
- **Ensure the problem is human-centred.** It should be clear who will be impacted by the solution (organization employees, customers, community members, suppliers).
- **Think actions, not things.** Consider problems that are linked to actions and experiences (verbs), rather than solutions (nouns).

Follow the challenge statement formula

Once you've selected the problem(s), you want to focus on, you need to reframe it into a problem or challenge statement. It works well to make your challenge statement a "how might we" statement – those familiar with design thinking will recognise this approach.

Describe the need:

[user] needs to [user's needs] because [insight].

Ask for the solution:

How might we [human-oriented problem to solve]
through/by [big hunch about the innovation]
so that [important outcome that will happen]?

Breaking down the formula

How might we = Gives people a feeling that there could be different kinds of solutions to the problem and that all ideas are welcome

+

Through/by = Gives people a direction to be able to submit more relevant ideas to solve the problem

+

So that = Makes it easier for people to understand what the ideas should result in

EXAMPLE:

Quick Stop Limited is an online retail platform operating in Zambia, who need a way to make deliveries in informal housings, which do not have registered addresses, so that they can increase their market penetration by becoming accessible to all Zambians.

How might we develop a system using Smart City technology so that Quick Stop Limited can deliver products to informal residences?

Review your problem statement to make sure it ticks all the boxes:[1]

- **Clear.** Is the challenge clear, even to people who don't work in this industry? Even if the solution you need is technical or specialist, expressing the challenge goal in non-technical language will help more people respond.
- **Positive.** Is it worded positively? Have you focussed on the outcome you want, rather than the problems associated with it?
- **Open-minded.** Is it focussed on the outcome, but open-minded about how to get there?
- **Targeted.** Is the question the right one to achieve that outcome? Well-framed challenges invite ideas for the issue they really want.
- **Inspiring.** Is the challenge likely to inspire and attract problem solvers? Does it convey the positive impact that solving this challenge could make on people in the organization, the market, or society?

1 https://www.sopheon.com/products/acclaimideas/insights/how-to-frame-an-innovation-challenge

COLLABORATION IN ACTION: CREATING FOCUSED AND INCLUSIVE CHALLENGE STATEMENTS

BongoHive and Yunus Social Business show that you can take different approaches depending on your relationship with the sector, the large enterprise partner, and the ecosystem.

When BongoHive set out on their Open Innovation Zambia program with Make-IT Africa, they reached out to experts in GreenTech, Smart Cities, and FinTech to determine key sectoral challenges. Then, BongoHive developed five to six challenge statements for each sector for 17 statements to give SGBs many opportunities to participate. Each statement was specific, with practical examples of how the problem manifests in the local context, for example:

Maria is a 30-year-old restaurant owner in the Soweto market of Lusaka, who needs a proper collection of waste around her workplace so that she can attract more customers to her business and increase her earnings.

How might we transform waste management services using GreenTech so that Maria can attract more customers and increase her earnings?

The program managers initially had low uptake for these challenge statements because of the novelty of GreenTech and Smart Cities in Lusaka. Therefore, they hosted additional information sessions to expand on the statements for potential candidates and increase engagement.

Yunus Social Business, meanwhile, were less embedded in the ecosystem. Therefore, they cast a wider net, calling for “businesses, startups, entrepreneurs, innovators, companies and civil society organizations with commercial solutions (products and services) that, in their application, cause changes and positive impacts on the lives of South African people.” Their example shows the value of remaining open-minded, particularly on your first program.

ISOs must perform a tricky balancing act between creating specific, well-defined challenge statements that address real industry problems, and posing a broader challenge that more SGBs can relate to. Your approach will likely be informed by the collaboration readiness of your ecosystem and may vary by sector, which means it can evolve over time.

BongoHive

yunus social business

RESOURCE ROUNDUP: FINDING AND SECURING PARTNERS

- How to identify readiness for collaboration by Platform C. You may find it useful to use this tool, which contains a rubric that expands on the concept of collaboration readiness with specific criteria that you can evaluate for your ecosystem.
- Mastering the Complex Sale by Jeff Thull. Thull provides a comprehensive guide that offers sales professionals strategies, techniques, and insights to navigate complex sales processes in the ever-changing business landscape. He guides you through four steps: discovery, diagnosis, design, and deliver.
- SPIN Selling by Neil Rackham. This book provides a sales methodology that emphasises the importance of asking questions to uncover customer needs and tailor solutions. Using data on 35 000 sales calls, it builds the sales framework of situation, problem, implication, need-payoff (SPIN).
- Customer Journey Map template on Miro. You can adapt this digital template to reflect the full OIP planning and implementation journey for your customer, the large enterprise partner.
- NDA template by LawDepot. You can customise the document according to your purpose.
- MOU template by LawDepot. You can customise the document according to your purpose.

CHAPTER 3

Recruiting & selecting SGBs

3.1 Before you start

Aligning corporate problems with entrepreneur innovation for open innovation can be a chicken-and-egg conundrum. Do you start with corporate challenges and then recruit businesses that can respond appropriately? Do you start with the sectors and competencies that are already prevalent in your local entrepreneur ecosystem and shape the program around these?

The answer will be different for every hub, but it will probably involve a bit of both. Although ISOs may have different starting points for open innovation, most start with large enterprise partners because building relationships and securing cooperation at this level is the most challenging aspect. We will now take a more granular view of assessing SGB maturity, which will allow you to create a successful recruitment campaign, design an appropriate program for your landscape, and manage partner expectations.

COLLABORATION IN ACTION: SURVEYING THE ECOSYSTEM

Yunus Social Business invests heavily in information-gathering activities to understand the local landscape of SGBs before finalising their program. This legwork and their networks within innovation ecosystems is a major part of their value proposition.

Senior Director Sergio López Ramos explains that their process ensures that they balance “what was expected by the client and what the ecosystem could offer”. Yunus Social Business believes that they should not expect SGBs to fit an unrealistic mould, but rather to offer a program that will work with businesses as they currently exist. Once they understand what kind of businesses are active in the local ecosystem – and how they are positioned to participate in an innovation program – they can adjust the program goals and design as needed.

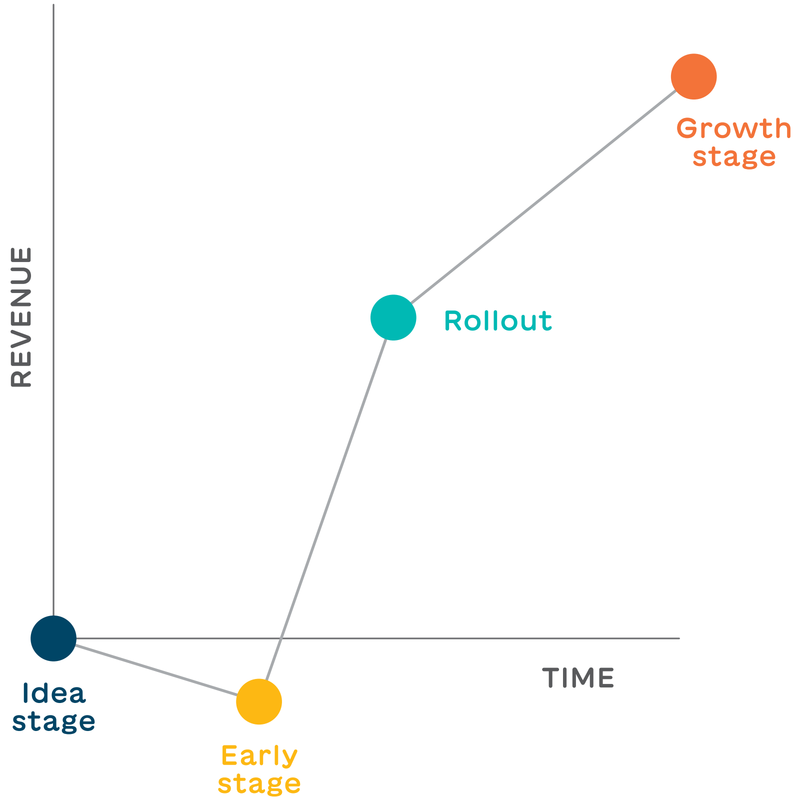
In the case of the Fight for Access Accelerator with Reckitt in South Africa, Yunus Social Business began with Reckitt’s three pillars of hygiene infrastructure, hygiene behaviours, and decentralisation of hygiene access. As this was their first program in South Africa, Yunus Social Business decided against creating specific challenge statements for recruitment, and rather decided to design flexible application criteria around Reckitt’s three pillars.

By communicating the reasons for their recommendations and taking a learning approach for future program cycles in Africa, Yunus Social Business was able to set realistic and achievable expectations for Reckitt, their ISO partners, local social businesses, and themselves. This provided the basis for a successful collaboration program, and for more successful future programs.

yunus social business

Know your entrepreneurs

Your ISO likely already has a strong sense of the maturity of your local ecosystem and the promising entrepreneurs in your network. Nonetheless, doing a maturity assessment of your local businesses will provide insights on how to recruit the right ones for your OIP.



Adapted from Launch League

TOP TIPS: UNDERSTANDING YOUR SGB LANDSCAPE

- **Narrow the scope.** If there are many non-negotiable criteria from your funders or partners for which SGBs they want on the program (e.g. sector, women-founded), Lay these out now and narrow the scope of your review.
- **Assess maturity.** Use a framework, like the one provided here, to assess which stage of the business lifecycle your local businesses are at.
- **Aim for scale-ups.** Ideally, your OIP should be designed for more mature businesses. These are businesses that have strong teams, organizational structures in place, and an MVP. Recalling the Ecosystem Diagnostic exercise in Chapter 2.1, the baseline level for an OIP is the *Early Stage* and for best practice, aim for the *Scale-up Stage.*
- **The rule of five.** For the program to be viable at a given level, you should be able to identify at least five businesses in that lifecycle category.
- **Design to the system you have.** You need to feed this analysis back into your challenge statements and program design. If most of your businesses are clustering in the early-stage or ideation phase, you need to adjust your expectations and design your program for the cluster at the highest level of maturity. This could mean changing the program design to a shorter-term challenge or bootcamp with corporate sponsorship. It could also mean opening the program to a larger pool of more mature businesses. More on this in Chapter 5.

Maturity Assessment

ISO PROGRAM	BUSINESS LIFECYCLE STAGE	TEAM	VISION	PRODUCT	MARKET	BUSINESS MODEL
Open Innovation training programs	**Mature business**	Recognised as market leaders	There is systems-level change in the problem area	Product is successfully handling growth	Strong partnerships for marketing, growth, distribution in place	Revenues have met or exceeded targets for multiple years
Accelerator, open innovation	**Growth stage/ scale-up**	Leadership, product, sales & marketing team can lead the company through growth	Vision has been achieved with early adopters and looks realistic in a larger market	Product is built for scale, new products in pipeline	Sales are growing each month and there is a clear path to profitability	Business model works and revenue model is performing strong
Role-specific training (bookkeeping, marketing, etc.)	**Rollout**	Team can build the product, understand the market, has industry connections	There is evidence that they are solving customers' problems	Product is almost ready for commercial distribution and team understands product management	Initial sales suggest that they can capture the market; discussions with large partners about distribution, marketing, etc.	Actual revenue and costs support future unit economics
Incubator	**Early stage: seed/proof of concept**	Team understands the problems	Team can propose a solution that is exciting to potential customers	Working prototype is in place	Evidence that customers want the solution and will pay target price	Revenue and cost projections, and plan to meet them, in place
Hackathon, ideathon, bootcamp	**Idea stage**	Team of at least two founders with complementary skills in place	Team has identified a problem.	Lo-fi prototype in place	Size and characteristics of target market are known	Plan for a revenue model, supported by existing models, is in place

Adapted from Abaca

COLLABORATION IN ACTION: LOOKING REGIONALLY, NOT JUST LOCALLY

Turbine's Moka Smart City program was a light-touch innovation challenge more than an OIP. But because their objective was to promote scalable solutions in their local Mauritius ecosystem, their learnings from the project may be useful for other open innovation projects.

In 2019, the innovation ecosystem in Mauritius – with a population of 1.2 million – had few startups or SGBs in infrastructure, transportation, or GreenTech. Thus, Turbine invited entrepreneurs from international hubs in Southern Africa and France to participate in the Moka Smart City Challenge. The winning team was an SME from France. In addition to sourcing clever mobility solutions for the city, the regional participation approach was a way to energise the Mauritius ecosystem and promote future development. Today, Turbine has a vision of formalising a regional network of large enterprises and startups from Southern African hubs to collaborate on solutions to local problems, which can then be scaled across the region.

ISOs in smaller, more isolated markets can take this as an example of how to network and work with other ecosystems. Creating an international network of ISOs, large enterprises, and SGBs involved in the OIP can catalyse open innovation locally through the "importing" of skills and knowledge. This approach also expands the market potential for large enterprises by assuring them that there is ample room to scale solutions.

turbine
enabling innovation

3.2 Recruiting the right businesses

Once you have established what's possible for your OIP through enterprise maturity assessments, you can begin recruiting SGBs. As we saw with the Ecosystem Diagnostic from **Chapter 2**, the goal of your program should be to recruit SGBs that have a similar level of collaboration readiness as your large enterprise partner(s). Your recruitment process must therefore be carefully planned to communicate the right information to the right target applicants.

By this stage, you will have finalised your onboarding plan and program design in collaboration with your large enterprise partners.

In particular, going into the recruitment process, you'll need the following elements finalised:

- challenge statements
- program design and timeline
- application and selection process
- application content and criteria
- communication strategy

This chapter will focus on the last three items: the application and selection process, core application content and criteria, and communication strategy.

Jump to Chapter 4 for the guide to Onboarding

Jump to Chapter 5 for the guide to Program Design

Design the application process

The overall application process is fairly standard across all OIPs. There are options to add or remove filtering steps, depending on the number and quality of applications you receive and the size of the program. In total, the application process from the call for applications to informing program participants should take about two months.

STAGE 1	2 WEEKS	**Finalising program design, timeline, criteria & marketing materials**	OUTPUT: Program design
STAGE 2	3 WEEKS	**Call for applications**	OUTPUT: Applicant pool
STAGE 3	1 WEEK	**Initial filtering Document review**	OUTPUT: Long list
STAGE 4	1–2 WEEKS	***Optional: Second filtering***	OUTPUT: Short list
STAGE 5	1 WEEK	**Final selection Interviews**	OUTPUT: Final cohort
STAGE 6	1 WEEK	**Informing participants**	OUTPUT: Sending onboarding information

TOP TIPS: PLANNING THE APPLICATION PROCESS

- **Pick your platforms.** Decide which tools and media you will use. Where will you post information about the program? Which channels will you use to answer questions? Do you have dedicated team members who are actively monitoring these channels? If you use multiple platforms, redirect these to a central communication channel to avoid missing inquiries from applicants.
- **Centralise information.** All information on the OIP for SGBs should be clearly communicated in a central, easy-to-read format. More on this in Chapter 3.3.
- **Make the form user-friendly.** For your application form, use a website which is usable on both mobile devices and desktop computers. Additionally, the applicants should be able to save their application to complete it at another time.
- **Get interactive.** Including info sessions where you explain the challenge statements, discuss the program content and goals, and take questions can help you reach more SGBs and convince them to apply.
- **Monitor application inflows.** Have weekly check-ins with your team during recruitment to assess your numbers and determine if you need to adjust your recruitment plan. Include both program and marketing/communications team members in these reviews.
- **Prepare to adjust course.** If you aren't receiving enough applications to perform a proper selection review and form a substantial cohort, you may need to revisit the challenge statements, ramp up engagement, or open the program to a wider pool of SGBs.
- **Secure judges.** Ensure that representatives from both the ISO and large enterprise are prepared and available to judge applications – particularly in the final interview round. This means you need to finalise your application timelines and ask key stakeholders to block out time for interviews as soon as possible.

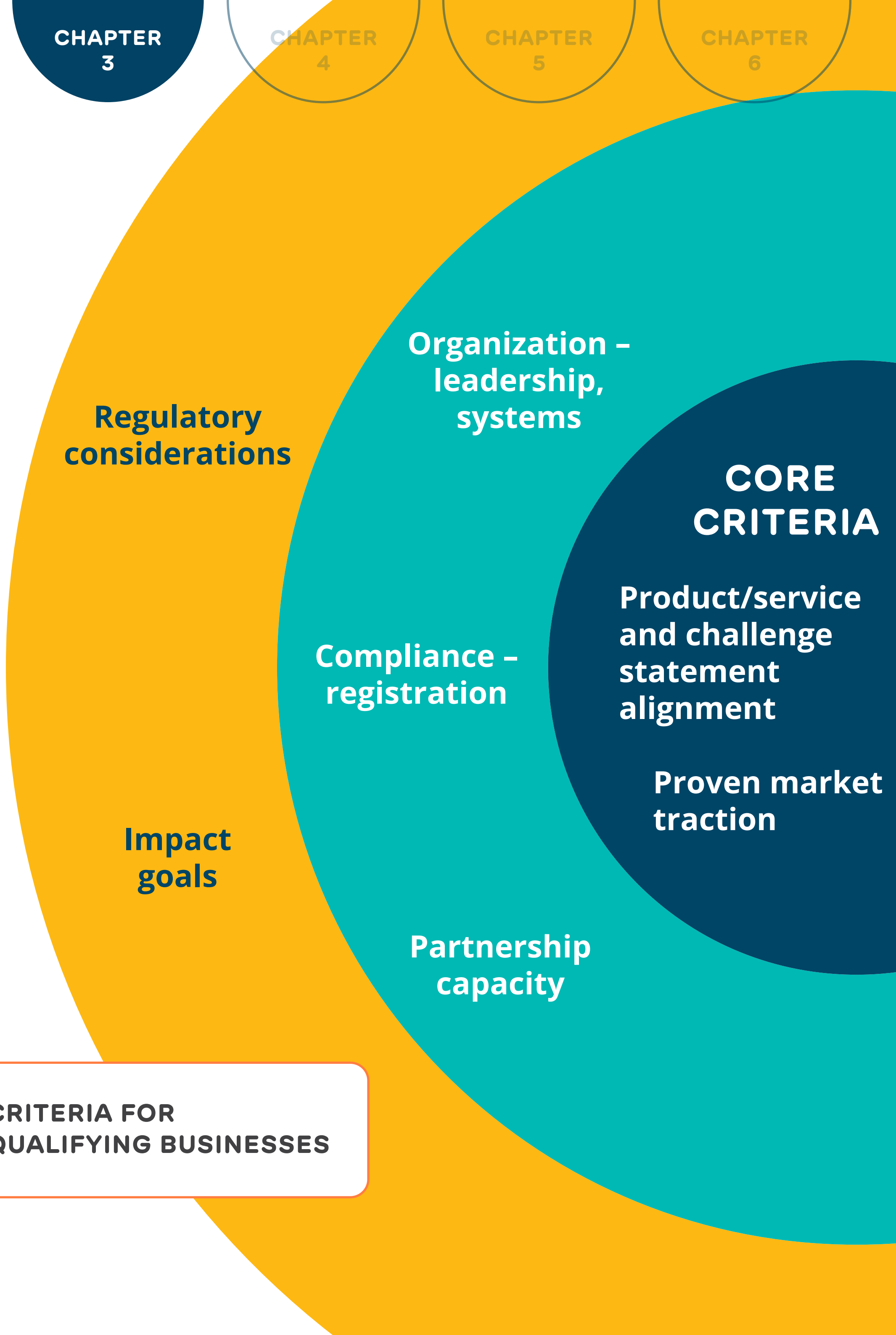
Create the application

In preparing the call for applicants, start by creating a set of baseline criteria for businesses. These are the non-negotiable characteristics that applicants can easily demonstrate, which typically relate to their organizational maturity, product, and market performance.

Beyond the core criteria is a set of criteria that support collaboration readiness and the specific requirements of the large enterprise partner(s) or funders. These are the experiences and characteristics of the SGBs that demonstrate their interest in and ability to partner with a large enterprise. Partners may also specify desired criteria – either in terms of SGB characteristics or their own preferences (ways of working, culture, strategic focus).

Make sure that your form explicitly asks applicants to demonstrate compliance with the core criteria to simplify your screening process. Ultimately, the quality you're looking for in a business is collaboration readiness, and this needs to be very clearly communicated to applicants. A written submission on the application form may be an ideal way to probe for some indicators of this readiness.

However, not all the criteria can be assessed from the initial application. For instance, their knowledge of large enterprises, organizational values, and open-mindedness may be better evaluated during an interview. Regardless, all criteria should be communicated to applicants from the outset on your website and form in some way – more on this in the next section.



CRITERIA FOR QUALIFYING BUSINESSES

TOP TIPS: DEFINING THE ACCEPTANCE CRITERIA

Your application criteria will be directly shaped by the collaboration readiness and maturity of the enterprises in your ecosystem. Here are some recommendations for the best practice case where you're designing for a mature ecosystem with an ample population of possible SGBs.

- **Make MVP a must.** Direct the call to entrepreneurs who already have traction in the market with a product or service. Even if their product does not completely address the challenge statement, these businesses will be best equipped to co-create or innovate with corporate partners.
- **Demand expertise.** Very often the businesses most successful with addressing corporate pain points are the ones who have experienced them first-hand. Call for founder teams that have experience working in the sector of interest.
- **Fish for compliance.** To be truly collaboration ready, an SGB should be registered and tax compliant, and have policies and financials that they can share. You can ask for public documents such as company registration as part of the SGB application process (make sure your application platform can support PDF uploads).
- **Include funders.** Your program funders – and other key stakeholders or partners – may have their own priorities, such as women in business or ESG targets. Incorporate their interests into your criteria.
- **Mind the regulatory environment.** Incorporate any regulatory incentives, such as equity targets, impact goals, or job creation. Businesses that align with these objectives may be more attractive to partners and have more opportunities in future.

COLLABORATION IN ACTION: SPECIALISING YOUR APPLICATION CRITERIA

If your ISO plays a unique role in the innovation ecosystem, in terms of sector specialisation or impact, you may be shaping your open innovation around additional economic, social, or environmental goals. This will translate into specialised application criteria, which may be essential or a nice-to-have. For instance, on the application for the Fight for Access Accelerator for social businesses, Reckitt and Yunus Social Business explained that they wanted business or solutions that prioritised:

- women and girls
- populations in remote and rural areas
- populations in informal settlements and suburbs of urban centres
- most vulnerable populations in urban centres (favelas, risk areas)

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3.3 Marketing the program in the ecosystem

ISOs must give serious thought to their communication strategy for the recruitment process. Ultimately, the questions you need to answer are:

- Who are we trying to reach?
- Where can we reach them?
- What information must we communicate to them?
- How should we communicate this information best?

In this section, we give some guidelines that will help you answer those questions.

Foreground open innovation in your messaging

In launching your recruitment campaign, your messaging needs to convey two key ideas: the value of open innovation for SGBs and the need for collaboration readiness. We discussed the value propositions for large enterprises in Chapter 2.2. SGBs will share some of these value propositions for collaborating with large enterprises, but also have their own.

Remember, collaborating with large enterprises is a demanding journey that only the most prepared and ambitious SGBs should approach. You're competing to attract the best SGBs to your program because they see it as a pathway to real partnerships. In your campaign, you need to communicate how the OIP can unlock some of the value propositions that are appropriate for the level of collaboration readiness you are targeting.

Your campaign should also be very clear about the expectation of collaboration readiness. Rather than pushing vague concepts of learning and working together, your campaign should explicitly state the value proposition of large enterprise partnership. This will attract applicants who already have ambitions, ideas, and plans working with larger enterprises.

COLLABORATION IN ACTION: BEING CLEAR ABOUT BENEFITS

Depending on your program design and the goals of your partner(s), you may be offering SGBs different benefits, which will impact how you frame the program in your recruitment messaging. For the Moka Smart City Innovation challenge, which did not include training or mentoring components, applicants were enticed with the promise of a pilot of the solution at Moka Smart City before promoting to other potential customers, a one-year contract with Moka, a monthly subsidy for operating costs during the first year, and US$40,000 in funding.

For a more conventional collaboration program, you can be succinct in selling the benefits to SGBs. Pick three things that your program will offer like Reckitt and Yunus Social Business did in their press release for the fight for Access Accelerator:

- **Bootcamps**: Impact accelerating bootcamps, delivered by expert partners, tailored to unlock specific barriers to growth.
- **Mentorship:** Expert mentorship from Reckitt's people, specialists in health and hygiene, and a wide range of business functions.
- **Funding:** Seed funding to invest in growth to scale the business and drive positive health outcomes.

Either way, applicants must understand this is more than a competition for seed funding. Ensure they know the big-picture goals of open innovation and how your program puts them on the pathway to partnership.

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Communicate the essentials

It's easy to let key details slip through the cracks when communicating. If you're using multiple platforms to market the program, or a slick website with multiple webpages, information can get fragmented and send your applicants on a scavenger hunt for critical information. Do them a favour: maintain a central program website and keep it simple, ensuring that it contains all the necessary information in one spot. There should be no doubt by the time an entrepreneur opens the application form about the application criteria, program goals, and program design.

PROGRAM WEBSITE INFO CHECKLIST

- ☐ program content, timeline, and key dates
- ☐ application criteria
- ☐ application form link
- ☐ information session or event details
- ☐ funder/partner information
- ☐ frequently asked questions

TOP TIPS: DESIGNING YOUR CAMPAIGN

- **Design to the channel.** You may need different types of campaign elements (posters, links, write-ups) depending on which communication channels you intend to use (such as newsletters, WhatsApp, Twitter, Facebook, Instagram, and LinkedIn). This is where fragmentation can become a problem, so be strategic: decide up front which channels you'll commit to, how you're going to use them and maintain them, and what materials you'll need to create for them.
- **Prioritise a thorough, clean webpage.** As discussed, the application webpage should be simple and contain all the information in one place. Make the webpage link easy to find from your homepage and affiliate sites.
- **Coordinate with partners.** Work with members of your partners' marketing teams to develop their own webpages about the program, link to your program page, and coordinate announcements. Be clear about your wishlist of support from them and keep them informed throughout the recruitment campaign so that you can maximise their networks and reach.
- **Get a one-pager.** Develop a one-page PDF document with all the key information that you can easily distribute to your networks across all channels and share this as a press release to news organizations in your innovation ecosystem. Try to strike a balance between thoroughness and catchiness: you won't be able to fit in everything, but you can catch the attention of the right people and send them to your website.
- **Leverage partner branding.** To enhance the reach and legitimacy of your program, include the branding of all partners: large enterprises, funders, institutions, or other collaborators. All your materials and communications should include their logos and branding.
- **Add links to everything.** All communications about your program should include a link and QR code to the application website or page.
- **Check for consistency.** Make sure that the messaging, language, and ideas are consistent across all your materials and platforms. You may be designing customised campaigns with different angles and messaging to target different audiences – this is fine. But is it clear from all the campaigns what the program goals are, the benefits for applicants, and who is eligible?

Spread the word

As we mentioned earlier, ISOs should conduct some basic market research about which social media platforms are commonly used in the ecosystem, and design materials accordingly. Once you have your info materials ready, create a schedule for how you'll share this information, when you'll share it, and with whom. How often will you post on which channels? Who are the key players who can help you reach SGBs?

Tap into your ecosystem network – such as your own alumni base, other ISOs, academic institutions, local media outlets, and communities – to communicate the OIP as widely as possible. Provide them with posters, social media pictures, and other resources which concisely explain the purpose of the OIP. In particular, emphasise that this is not an incubator program, whilst also advertising the benefits of joining this program.

Applicants should be able to communicate with you directly. You want them to be able to ask questions as they prepare their applications and learn more about open innovation before entering the program. Be ready to field inquiries on your channel of choice as they come, and aim for quick turnaround times.

COLLABORATION IN ACTION: LEVERAGING NETWORKS FOR RECRUITMENT

As a principle, Yunus Social Business takes a systems-thinking approach to their programing, which means they aim to be a facilitator between different parts of the ecosystem they work in. They conceptualise the ecosystem as a space which they enter and contribute to, not radically change according to their own goals.

"To us, it's about figuring out what role we can play in the ecosystem that already exists… how do we become relevant, and how do we work with the organizations which are already doing great work?" says Senior Director Sergio López Ramos.

Finding and working with the organizations doing the "great work" can be challenging when ISOs are working with large enterprises in ecosystems that are new to them. But it also makes the cooperation of local partners even more vital. In South Africa, Yunus Social Business relied on their network of local innovation hubs and ISOs to recruit the right social businesses for the Fight for Access Accelerator. Their call drew 50 applications, from which they selected six businesses to participate in the South African program.

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3.4 SGB selection

If you've expended a great deal of energy in marketing your program to the right SGBs, the selection process should be fairly straightforward for filtering and shortlisting candidates for the OIP based on their market traction and collaboration readiness.

Once you've shortlisted SGBs for the program, having weeded out applicants who plainly do not meet your core criteria, it's time to conduct interviews. Interviews allow you to dig deeper into the innovation potential and collaboration readiness of your applicants. Many of the criteria for collaboration readiness and partnership capacity are not easily captured in standard documentation or essay responses. A semi-structured interview with lots of follow-up questions is a better tool.

INTERVIEW QUESTIONS FOR GAUGING COLLABORATION READINESS

The goal of your interview is to find clues of collaboration readiness in description of the business itself. Your questions should therefore engage entrepreneurs to talk about aspects of the company history, culture, strategy, and activity, rather than more abstract notions of collaboration and innovation. You want to ask approachable questions that invite entrepreneurs to speak candidly about their businesses and their goals. Some examples:

- How has/does your business work with other organizations?
- What have you learned about successful partnerships or collaboration with other teams and organizations?
- How can you add value (to large organizations)?

TOP TIPS: INTERVIEWING YOUR TOP CANDIDATES

- **Use an objective evaluation tool.** To make your interview evaluation process simple, structured, and objective, use a standard rubric of some kind to assess applicants. Your rubric should reflect the program goals of all partners and allow judges to make a written assessment, scoring candidates for later comparison (see template below). Rubrics are important for mitigating personal biases and focusing on candidate compliance.
- **Get multiple perspectives.** After the initial filtering stages, involve multiple judges, both from your own team and external teams, in the selection process.
- **Include partners.** Ensure that at least one representative from the partner organization – ideally a strategic decision-maker or the project leader – is involved in each interview. This is important, not just to have the perspective of the large enterprise represented in the evaluation process, but to build and maintain partner buy-in to the program. Involving them in these decisions will give them more skin in the game.
- **Add another round.** If your shortlist is rather long, if you're having difficulty narrowing the pool, or if the program requires extremely specific SGBs, you may consider adding a second round of interviews or even a pitch session to help you get to the final cohort.

COLLABORATION IN ACTION: SELECTING PARTICIPANTS

For the selection process of the Fight for Access Accelerator, applicants were evaluated across eight categories, which were weighted based on the particular goals and values of the project partner. For example, social impact and connection to Reckitt's business pillars carried considerable weight. More generic criteria, such as the size of the business, business model, and the diversity of team members, were also included.

ISOs should know that they can perform multiple screening steps to determine the best candidates for the accelerator. Especially if your program is designed for a smaller cohort where all members will receive funding, you'll want to be highly selective. Of the 50 businesses who applied for the program, Yunus Social Business interviewed 20, from which they shortlisted 15. They then brought their shortlist to a jury composed of different stakeholders to select 10 businesses to pitch. From the pitch session, they made the final selection of six social businesses to participate in the program and receive seed funding.

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RESOURCE ROUNDUP: RECRUITING AND SELECTING SGBS

- A Hub's Guide to Program Management by Launch League: This guide contains helpful introductory information about what makes good entrepreneurs and entrepreneur ecosystems.
- Venture Investment Levels by Abaca: Abaca focuses on investment readiness for enterprises, but their tools for support organizations can help you to gauge and track the maturity of the SGBs in your ecosystem or program cohort.
- Accelerating Women Entrepreneurs Handbook by GIZ: This resource gives an overview of how to run programs that best support women entrepreneurs, particularly in the Global South.

CHAPTER 4

Onboarding & challenge introduction

4.1 Before you start

After you have finalised your program design and recruited participants, it's time to onboard them to the program and introduce them to the challenge. From the perspective of the ISO, there are three key outcomes of the onboarding phase:

1. Establishing community management systems
2. Setting partner expectations for the program and collaboration
3. Helping partners to develop into a team

Unlike other ISO programs, such as incubators and accelerators, OIPs are part-time, lighter-touch programs in which SGBs and large enterprises are expected to manage their own collaboration journey. Once the program is underway, ISOs play a limited role in guiding participants. This is why the onboarding phase is critical for ISOs to set the tone for the program and facilitate the relationship between partners. You should therefore give careful thought to how you want to orient participants, introduce partners, and set up the systems that will support your program.

This chapter walks you through the essentials of an effective onboarding program, starting with a look at what you want the onboarding phase to look like and how you will communicate with participants.

TOP TIPS: MAKING THE MOST OF THE ONBOARDING PHASE

- **Prioritise professionalism.** Make your communications as clear, succinct, and professional as possible. This means sending materials, invitations, and information in a timely fashion, anticipating the needs and questions of partners, and producing documentation that is error-free and attractive.
- **No hybrid sessions.** Commit to a format for your onboarding sessions to ensure that everyone feels included and that technical difficulties don't sabotage the experience for some participants. You may be using a combination of virtual and in-person formats for different activities, but each activity should be the same for all participants. Either everyone is joining via Zoom or no one is – no half-and-half.
- **Prepare to repeat yourself.** Plan on repeatedly explaining the program and expectations to your participants in different ways. After months of preparation, you may know your program inside and out, but your participants are brand new to the OIP. Further, they're balancing the OIP with their core business activities. A once-off overview during the orientation will not be enough. They will need to be continually reminded and prompted about key dates, activities, processes, and outcomes.
- **Be clear about expectations.** Part of setting up partners for success involves the ISOs being clear about what, exactly, they want from partners for a given activity. Don't leave room for interpretation with vague directives for a presentation, for example. Be explicit about your asks and give partners ample time to prepare.

COLLABORATION IN ACTION: VIRTUAL OR FACE-TO-FACE?

Virtual programs have an array of benefits, particularly with regards to accessibility. Research shows that virtual programs have higher numbers of women, disabled people, and those located in rural areas than face-to-face programs. On the OIP in particular, which should target more mature SGBs, entrepreneurs need a flexible program that can fit into their business schedules. If you need to cast a wide net or take a regional approach to recruitment, virtual programing will be a necessity for participation.

And yet, virtual programing can present challenges when it comes to presenting valuable and engaging content, facilitating collaboration and learning, and ensuring participants are giving the program their full attention. These concerns led BongoHive to create a fully in-person program for Open Innovation Zambia in their innovation hub in Lusaka, Zambia. Especially since the program was designed around a less mature sector in the local context, this was a strategic decision to ensure that all participants were brought along. In-person programing has its own merits. Engaging with others in the same space allows for informal discussion and spontaneous interaction, which builds relationships faster. Additionally, many ISOs have large physical spaces that they need to maintain and use, making it hard to justify fully virtual programing to their stakeholders.

The trade-off was that BongoHive had to limit their recruitment to local startups because their budget did not allow for travel costs. If ISOs are committed to in-person programing, they should therefore build travel costs into their budget to maximise their reach.

To get the best of both worlds, Yunus Social Business recommends having a virtual core program, and starting and ending the program with in-person sessions. In particular, the initial session during the onboarding phase should be dedicated to facilitating dynamic conversations between both the large enterprises and SGBs.

"Have a first meeting physically to build momentum and trust in the team," says Sergio López Ramos, Senior Director of Yunus Social Business.

BongoHive

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Prepare the program infrastructure

By the time you reach the onboarding stage, your program design will be finalised.

There are key elements of the program infrastructure that you'll need to reference and incorporate into your onboarding program.

Jump to Chapter 5 for Program Design

KEY ELEMENTS OF PROGRAM INFRASTRUCTURE

- ☐ **Communication platforms**
  - Real-time communication channel(s)
  - Webinar/call platforms
- ☐ **Information platforms**
  - Document repository for program materials
  - Program calendar
- ☐ **Key team members**
  - Key leaders and decision-makers from the large enterprise who can kick off the program
  - Main point of contact from the large enterprise for the entire program
  - Employees from the large enterprise who will mentor and/or collaborate with the SGBs
  - Coaches from the ISO or external groups
  - Facilitators and program managers from the ISO
  - Main point of contact from the SGBs for the entire program
  - Participating team members from the SGBs
- ☐ **Program content**
  - Dates and locations for any in-person events/activities

Design the onboarding program

The contents and design of your onboarding program will be contingent on a few factors:

- Whether your program is virtual or in-person
- The number of SGBs in the program, relative to the number of large enterprise partners, or participating employees from the large enterprise
- The level of interaction your program requires between the different participants, and the platforms/tools/processes that will facilitate this
- The collaboration readiness of your SGBs

For instance, a program designed for less mature SGBs with low collaboration readiness will likely be very structured and involve more facilitated activities from the ISO. However, all onboarding programs should include some key elements related to explaining the program, introducing partners, and onboarding participants to the communication systems.

It's up to ISOs to decide what formats they want to use to manage these processes and information:

- synchronous webinars and presentations
- mass presentations vs. small group meetings
- asynchronous videos, podcasts, or slide shows
- digital forms and surveys
- in-person meetups
- emails and newsletters
- real-time communication channels

ONBOARDING PROGRAM CHECKLIST

- ☐ Program documentation
    - Welcome packet with all program information
    - Templates and readings for any onboarding activities
- ☐ Introduction and onboarding to the communication and information platforms
- ☐ Incoming partner survey
- ☐ Welcome session hosted by the ISO
    - Presentation of the full program, outcomes, and key dates
    - Presentation from the large enterprise partner (ideally a key decision-maker) about the challenge statement and their role in the program
    - Overview of the different SGB participants
- ☐ Introductory meeting between members of the SGB teams and their mentors/collaborators from the large enterprise
- ☐ Follow-up meeting(s) between SGBs and large enterprises for team development
- ☐ Introductory meeting between individual SGBs and an ISO facilitator/point of contact
- ☐ Networking session for the SGBs to meet and connect with each other

4.2 Getting oriented

With the design of your onboarding program outlined, you can turn your attention to your community management systems and how you will orient participants to the program and each other. For best practice, ISOs should include a few core orientation activities to get SGBs and large enterprises excited about working together.

Conduct an onboarding survey

Although your program design will be finalised by the time you're onboarding partners, you should still build in time and capacity for tailoring the program to the actual needs of your participants. Conducting a participant survey early in the onboarding phase will allow you to collect more granular information about their knowledge base, interest areas, and collaboration readiness, and adjust accordingly. The onboarding survey is also a critical part of the M&E strategy and you'll need to ensure that it aligns with your reporting requirement. Have a look at Chapter 6 before you start to see the key indicators you need to incorporate into the survey.

TOP TIPS: COLLECTING PARTNER FEEDBACK

- **Do it ASAP!** To give your team maximum time to incorporate participant feedback, send out your survey as soon as possible after making selections. Encourage SGBs to take time to express their needs so that they can get the most from the program.
- **Digital formats.** Use a user-friendly and accessible online form, such as Typeform, Cognito, or Google Forms. Be sure to test the survey and links before you send it out to make sure that all the questions present as you want and that everything works.
- **Get specific.** You're trying to assess concrete needs in the way of knowledge, skills, and competencies. Ask questions about specific topics from your core curriculum to gauge participant familiarity.
- **Get practical.** This survey is also an ideal opportunity to ask about preferred communication channels and ways of working. You won't be able to please everyone and it may not be feasible to use alternative platforms, but you can still sense check some of the program interfaces and infrastructure requirements to make sure your participants will be able to use your apps and channels.
- **Include a focus on partnership.** The survey should have a section related specifically to knowledge of, and interests in, large enterprises and how to work with them.
- **Don't forget technical assistance.** Beyond the cohort training presentations, OIPs also make provision for technical assistance (legal, finance, sales) that may vary by SGB. Ask them about it so that you can begin recruiting external support as needed.
- **Keep an eye on M&E.** Make sure that this survey's contents also aligns with your M&E strategy and the outcomes you want to measure. This may be integrated into your other questions, or you may add a section specifically for baseline measurements of program metrics.
- **Get their input.** Include at least one open-ended question where participants can request specific topics or assistance that you have missed, or express concerns they have about collaboration with large enterprises. You may even ask more out-the-box questions about how they're feeling, what they're most excited about, their strengths, or what opportunities they see ahead. This survey is another opportunity to get to know your participants better as a team, so make the most of it.

COLLABORATION IN ACTION: ASSESSING PARTICIPANT NEEDS

As a standard step on all their entrepreneur programs, both BongoHive and Yunus Social Business conduct a needs assessment with all their participants before the program starts, which is used to adjust the training/coaching content. At Yunus Social Business, the training modules contain 60% fixed content related to core competencies such as lean methodology, business modelling, and impact monitoring and measurement. The other 40% is variable, depending on the needs of the social businesses.

ISOs should aim to strike a similar balance for their OIPs. What is the core fixed content for your program? Chapter 5.2 discusses the recommended content for learning activities on the program. You can use this as a framework for designing your fixed content, while adding other fixed content that may be related to your program specialisation and making provision for other needs that might arise from your survey.

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Host a Welcome Workshop

Your OIP will officially kick off with your Welcome Workshop. You should design this introductory workshop to include presentations from all the key partners: your ISO team, the large enterprise partner(s), the SGB participants, and funders or other relevant stakeholders. Crucially, however, these presentations should be directly pertinent to the program, not generic sales presentations or marketing materials. ISOs must clearly communicate these expectations to presenters and give them ample time to prepare.

TOP TIPS: RUNNING YOUR KICK-OFF EVENT

- **Prioritise professionalism.** We'll say it again: professional presentation is key to participant retention and engagement. The kick-off event is a time for first impressions, and your chance to assure participants that your program deserves their time and effort. Be prepared, create visually appealing presentations and materials, and be positive.
- **In-person is ideal.** Even if your program is largely virtual, using in-person activities for the kick-off and wrap-up events is immensely beneficial for building trust and empathy between all the team members – SGBs, large enterprises mentors, and ISO members. If it's feasible to get everyone in the same room, do it!
- **Welcome packet printables/downloadables.** Decide what materials your partners need and have these ready: program calendar, training curriculum, final event details, a brochure of all the SGBs in the cohort.
- **Incorporate partner feedback.** Ideally, you'll already have the feedback from your onboarding survey by this stage, in which case it should be reflected in your presentation on the program content. You can even include an FAQ segment where you address common queries or concerns expressed in the survey.
- **Leader participation is essential.** It's vital that senior decision-makers and leaders from the large enterprise and/or funder participate in the workshop. Their involvement is key to boosting the confidence and drive of the SGB partners.
- **Partner presentations.** Ask large enterprise partners to present on key topics that will be relevant to kicking off collaboration with SGBs, for example, their procurement processes. See Chapter 4.3 for more on communicating these responsibilities to large enterprises.
- **Making introductions.** Use this time to introduce SGBs to their coaches and mentors. The use of breakout rooms, online or in person, might be useful for this.
- **Think outside the box.** Beyond the initial workshop, you can consider adding orientation activities that promote networking and learning for collaboration. Maybe SGBs can spend half a day on-site at their partner's offices to learn more about them. Or perhaps other kinds of one-on-one sessions can be organised for SGBs and their mentors/coaches. See Chapter 4.4 for more activities partners can do.

4.3 Setting expectations

Every interaction you have with your partners is an opportunity to communicate partner expectations and responsibilities for the OIP. Recalling the previous exercises we did in assessing collaboration readiness and value propositions for the different partners, ISOs should use their onboarding space to remind SGBs and large enterprises of how they're expected to engage on the program and the benefits they will get from it.

SGBs

The biggest challenge for SGBs on an OIP is to rise to the professionalism of an established large enterprise as they collaborate. But this is also the experience that they will most benefit from as they grow their businesses in future. With that in mind, ISOs should find ways to communicate the following responsibilities and expectations to the SGBs in their cohort:

RESPONSIBILITIES

- **Baseline participation.** Attendance is required at all program convenings: info sessions, coaching sessions, learning activities, partner and mentor meetings, networking events, and the final pitch session. This means ISOs must communicate these dates as soon as possible.
- **Navigate your own journey.** Ultimately, SGBs are responsible for driving their interactions and relationships, not just with their large enterprise partner, but with other stakeholders in the innovation ecosystem who may be useful for the program. They must be prepared to ask questions, make proposals, problem-solve, and negotiate.
- **Remain open.** Open innovation is only possible if the individuals involved open themselves up to the team and are open-minded to the input of other members. SGBs can lead by being transparent with their partners where appropriate and building trust.
- **Be adaptable.** SGBs will have a chance to learn more about their partners during the onboarding process. They should prepare to act on this information, adapting to ways of working or behaviours that will be beneficial to the collaboration and program goals. Of course, this is a mutual process that they may need to negotiate with partners.
- **Adopt a peer-learning mindset.** SGBs should not see the OIP as a top-down learning experience from large enterprises, ISOs, and those experts external to them. All these organizations are members of the same ecosystem who have much to teach and learn from each other.
- **Embrace friendly, healthy competition.** If SGBs are serious about peer-to-peer learning, they must not discount the other SGBs on the cohort. Especially if SGBs are competing for funding, or if they're all in the same sector, it will be natural to assume a competitive posture, which can be greatly beneficial for driving performance outcomes. But the emphasis is on *friendly* competition: SGBs should make the most of their time with peer companies to exchange contacts, learnings, and ideas.

EXPECTATIONS

- **Collaboration skillsets.** The learning activities component of the program will equip SGBs with some of the technical skillsets for collaborating with larger enterprises in the public and private sectors, and scaling solutions.
- **A new world.** Working closely with large enterprises, SGBs will gain a deep understanding of the world of government or corporate culture, decision-making, and operations.
- **A platform.** The program will likely conclude with a demo day or pitch event for SGBs to showcase their work. This may be an opportunity to secure funding, a deal, or some other support, but also an opportunity to speak to a wider audience in the industry or innovation ecosystem.
- **A foot in the door.** Beyond learning, the program will give SGBs an opportunity for commercial partnership, not just with the large enterprise, but possibly others in their network. They may even find opportunities with other SGBs in the cohort, funders, and stakeholders they meet over the course of the program.

Large enterprises

The biggest challenge for large enterprises on an OIP is to step outside their highly institutionalised environment and embrace a process that they might not fully understand. And yet, this is not a philanthropic exercise; they stand to benefit greatly from this process, even if those gains are not immediately clear. With that in mind, ISOs should find ways to communicate the following responsibilities and expectations to their large enterprise partner(s):

RESPONSIBILITIES

- **Baseline participation.** Attendance is required at all program convenings: info sessions, partner and mentor meetings, and the final pitch session. Depending on the MOU you have with the partner, this baseline will vary. Regardless, ISOs must communicate these dates as soon as possible.
- **Accountable team members.** Part of active participation involves having employees who are accountable to the program as mentors, marketing team members, and administrative coordinators. ISOs need to prompt large enterprises to identify these members and take their involvement seriously by accommodating and/or incentivising their participation.
- **Focus on the challenge.** Although the OIP certainly presents an opportunity for large enterprises to showcase their brand to multiple audiences, they must remember that they're not here to sell to SGBs. Their presentations and mentorship sessions should be centred on the challenge statements and the program goals, with content and thought leadership that is clearly relevant to the practical aspects of the collaboration.
- **Adopt a peer-learning mindset.** Large enterprises should not see the OIP as a top-down learning experience for the SGBs, with themselves in the role of educators. All the organizations in the program (ISOs, SGBs, external partners) are members of the same ecosystem who have much to teach and learn from each other. Large enterprises should embrace the opportunity to learn as much as to lead.

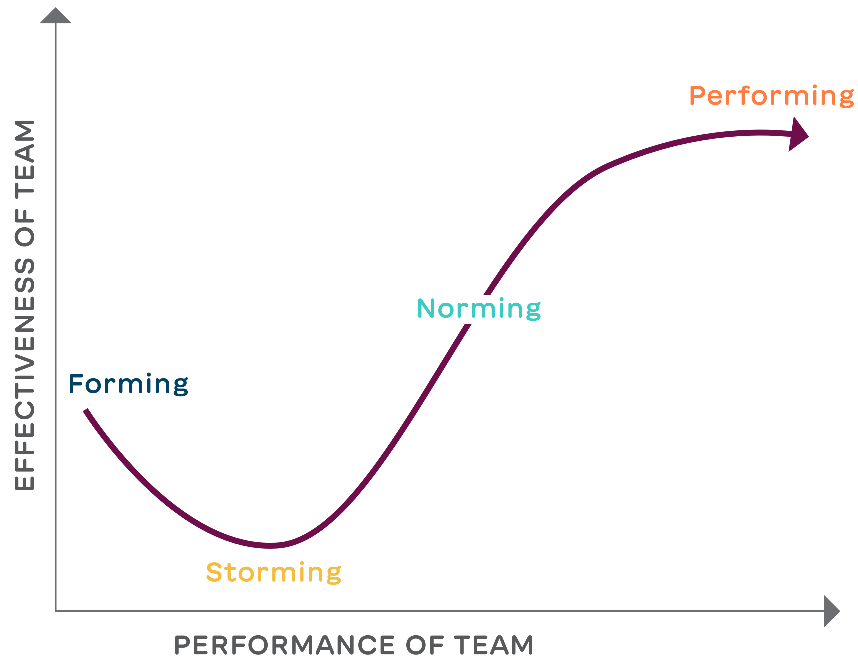
EXPECTATIONS

- **Solutions of tomorrow.** Of course, the ultimate expectation is that large enterprises will directly benefit from the collaborations with SGBs in the form of market insights, product development, access to talent, and future commercial partnerships.
- **A foundation for innovation.** For first-time partners, this program can increase their collaboration readiness and provide large enterprises a foundation for Open Innovation in future. They should not see the OIP as a once-off, but a gateway to more collaboration and innovative partnerships in their ecosystems.
- **Satisfaction and leadership.** In giving of their time and resources in the form of the program design, mentorship, and possibly funding, large enterprises are contributing to their industries and local economies. This is a demonstration of leadership that they can be proud of and take back to their organizations, stakeholders, and customers.
- **A burst of energy.** Especially for employees who are mentoring or working directly with the SGBs, the program work may provide them with inspiration and creativity that they can apply in their own work.

4.4 Coming together

Any time new people or groups come together to work towards a common purpose, they must figure out how they'll work as a team to achieve their goal. This process of team development usually has four phases:

1. **Forming:** the introductory stage where members are just getting to know each other and are putting their best foot forward. This is a time for information gathering and sharing, which means there's more thinking than doing, and therefore less room for conflict.
2. **Storming:** the stage where members are feeling more comfortable with one another and start taking action, but not always effectively. This is a time where different ways of working come to the fore, personalities clash, and disagreements emerge. People may get frustrated or resentful, but they need to find a way to resolve conflicts.
3. **Norming:** the stage where the team agrees on a plan and begins to understand how each member will contribute. This is a time where members begin to listen to one another and compromise to reach their goal, which helps the team build trust. As members start to better understand their roles, the roles of others, and their mission, they become more effective at working together.
4. **Performing:** the stage where the group has become a real team. Having stabilised and committed to their goal, they're able to perform well, with different members complementing each other's strengths.



As facilitators, ISOs can play a role in helping partners get to the performing stage as quickly as possible. Ultimately, it's up to the large enterprises and SGBs themselves to grow and manage their relationship, but your onboarding program can set them up for success.

Check your assumptions

For partner teams to start norming, they need to better understand each other and interrogate possible sources of conflict that might live in their assumptions about one another. You can encourage this by including an Assumption Test in your onboarding program.

An Assumption Test is an exercise that both partners carry out to challenge a notion they have about the other in relation to the program, collaboration, or partnership. Each partner creates a testable hypothesis about the other, and then tests it through an interview where they learn more about the other's thinking, values, processes, or behaviours. Through this simple exercise, partners learn a few things:

- They may be operating on stereotypes or notions of certain organizations or professionals that do not hold, and they should suspend these.
- They have more or less in common than they realised, and they must respond to this.
- Their partner may have certain core values and elements of organizational culture that they must respect and adapt to.

In addition to promoting team cohesion, the Assumption Test can help partners learn more about the problem they're trying to address together and how they can develop their solution over the course of the OIP.

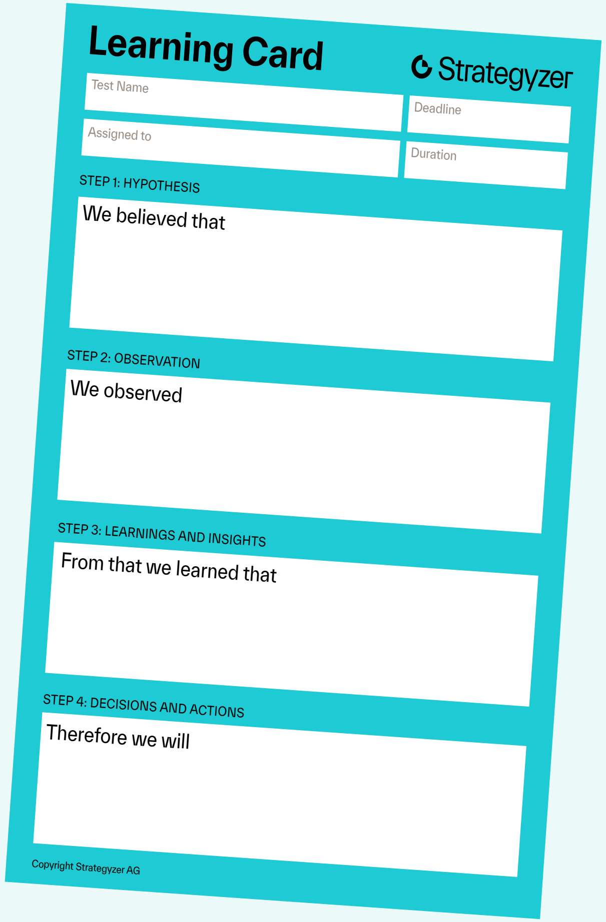
TOP TIPS: FACILITATING AN ASSUMPTION TEST

- **Make it a group activity.** If you want to use it, the Assumption Test should be included in the initial onboarding session. It can be assigned to partners as homework after the initial meeting: ask them to go away, develop their assumptions, and then come to their next meeting prepared to test their assumptions together. If the test will involve (reasonable) data requests from the partner, members should be advised to request this ASAP before the next meeting.
- **Use a template.** Give both partners a copy of the Test Card template (below) that they can use to design their test during the "homework" stage. The Test Card prompts them to define their assumption as a hypothesis, identify the test/measure they will use to test the hypothesis, and list the acceptance criteria.
- **Pick a useful assumption.** For the test to be useful, partners should select assumptions that: are relevant to the challenge statement and the goals of the collaboration; can be supported or negated by data that you can realistically obtain; and are expressed with respect to the partner organization, not individuals. Partners can, of course, pick multiple assumptions to test, but should prioritise quality over quantity, especially as time may be limited in the testing session.
- **Get scientific.** When partners reconvene to test their assumptions, they should take care to ask questions or request data without disclosing or hinting at the assumption they're testing. A member of the ISO might attend the meeting to help facilitate the testing process so participants can focus on the activity.
- **Be ready to share.** Under this design, the testers will share their assumptions with each other after the experiments to maximise team engagement learning. (This is not always the case. More often, Assumption Tests are one-sided, with the experimenters using the exercise to gather information solely for their own purpose, and do not require the information sources (interviewees) to know about the assumptions.) Partners should therefore be sure that their assumptions are appropriate and respectful.

Download the original at https://www.strategyzer.com/hubfs/Assets%20-%20Downloads/the-test-card-1.pdf

BUILDING ON THE ASSUMPTION TEST

The Assumption Test can be useful for a number of purposes beyond team building. It's a great tool for understanding consumer behaviour, product innovation, change management, or working with other stakeholders. If you choose to use the Assumption Test for one of these applications, follow it up with a Learning Card that can support your internal capacity building and help you figure out how to use your learnings from the test. The Learning Card encourages you to articulate what you actually observed (step 2) and what you've learned from challenging your assumptions (step 3). You then decide on an action to take based on that (step 4).



Download the original at https://www.strategyzer.com/resources/canvas-tools-guides/the-learning-card

Try out some other exercises

You can supplement the Assumption Test with other exercises that encourage partners to understand each other better:

Empathy mapping:

The purpose of empathy mapping is to gain a deep understanding of how to meet an individual customer's needs. There are a few different templates for empathy mapping available online, and you can check out a good template and video tutorial in the Resource Roundup. Generally, the templates touch on the following considerations:

- How would you describe your customer?
- What does your customer feel and think – what are their worries, goals, etc.?
- Who influences your customer?
- What visually draws their attention?
- What does your customer say and do? What are their activities and tasks?
- What are their pain points or challenges?

Personas:

Personas can be used for both B2C and B2B sales to determine how best to meet a client's needs, as well as identify any risks or barriers. Check out Chapter 2.3 for a persona mapping template and further instructions.

Customer journey mapping:

A Customer Journey Map follows a customer's interactions with the business, product/service, and customer service afterwards. It considers factors such as how the customer is interacting with the business, what their actions are, their thoughts, feelings, who in the business is involved at that phase, and further opportunities. Check out Chapter 2.3 for an example of a Customer Journey Map.

Photo by Christina on Unsplash

RESOURCE ROUNDUP: ONBOARDING

- Empathy Map template by Miro. You can send partners the link to this digital template for use during an empathy mapping exercise.
- Empathy Map tutorial by SAIS Program. This video tutorial breaks down the process of creating an Empathy Map.
- Test Card by Strategyzer. Partners can use this test card template for your Assumption Test exercise.
- Learning Card by Strategyzer. Partners can use this learning card template as a follow-up to the test card for other applications of the Assumption Test exercise.
- The Collaborative Innovators Toolkit created by GIZ for Startups, public sector entities and facilitators of collaborative innovation processes. There are various templates in Module 2 (project brief agreement) and 3 (cooperation and communication plan) that may be useful for preparing stakeholders for collaboration.

CHAPTER 5

Learning activities, mentoring & coaching for collaboration

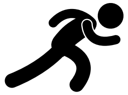
5.1 Before you start

Designing your particular OIP is not a once-off exercise but an ongoing process for ISOs. It starts before you approach partners, continues to be refined as you secure partners and define challenge statements, is finalised before you begin recruiting SGBs, and then revisited once you have selected participants. The goal of the design process is to align the program activities with the specific outcomes set by you, your partners, and funders. Recalling the 88from Chapter 2.1, there are three categories of program goals depending on the ecosystem collaboration readiness:

BASELINE: Program goal = Collaboration openness

SGBs and large enterprises in your ecosystem have little to no experience with these types of partnerships or innovation projects.

- Partnership is a longer-term goal
- Program focus: developing an understanding of the value of collaborating
- Emphasis on what skills, processes, and activities need to be developed for collaboration



INTERMEDIATE: Program goal = Collaboration readiness

The SGBs and large enterprises have some experience in thinking about innovation partnerships.

- Program goal is on getting the SGBs and large enterprises ready to work together
- Program focus: shaping value propositions, and understanding the sales and procurement process
- Partners should think about what a pilot might look like and the financial model for this

BEST PRACTICE: Program goal = Collaboration

The SGBs and large enterprises understand the value of such partnerships and have a good understanding of the risks and opportunities.

- Partnership is an attainable goal
- Recruitment and selection are imperative (i.e. well-crafted challenge statements, well-suited solutions).
- Program focus is on product innovation and piloting
- Emphasis on negotiation skills and legal advice

Once you know what category of program you're designing for, you need to set specific objectives. Work your way from the big picture back to the specifics.

Start with a picture of what a good set of outcomes would be over time. Ask yourself:

- What does success look like immediately after the program?
- What does success look like one year after the program?
- Are there other longer-term goals for the ISO, the ecosystem, or the sector that we want to support with this program?

It's important that the program creates a positive change for participants. This is also part of your OIP value proposition. So, clarify:

- What do large enterprises want at the end of the program?
- What will SGBs receive or gain by the end of the program?

The parts of your program should be logical and quantifiable:

- What activities should we run to meet the objectives of participants and the funder?
- From these activities, what performance outcomes do we want to see and how will we measure them?
- If we already have certain program activities in mind, why are we doing them and what outcome do they support?

Your answers to these questions will determine which activities you include in the program, and the approach and formats you adopt for each. There are also clear implications for your M&E strategy, which means each of these elements must speak to one another.

As we saw in Chapters 2 to 4, there are many variables related to your partners and innovation ecosystem that will influence how you align these elements. Going into the program design process, expect to draw on all the research and information-gathering activities you perform during partner engagements, recruitment, and onboarding.

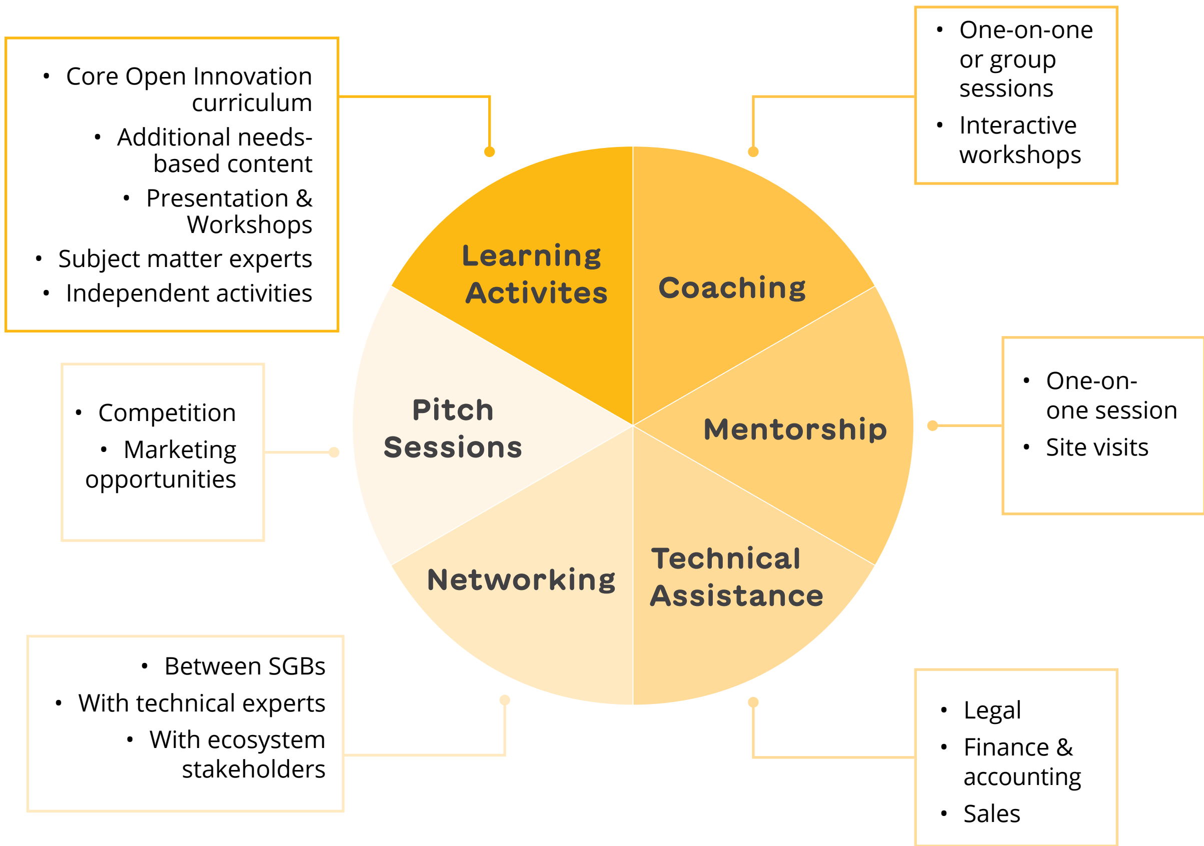
This chapter will explore the framework for your core program design and how you can adapt it to make the OIP your own.

KEY DATA SOURCES FOR THE PROGRAM DESIGN

- Ecosystem Diagnostic
- Partner Development Canvas
- Persona/Customer Journey Map for large enterprise
- SGB applications and interview notes, if applicable
- Onboarding survey and needs assessment

5.2 OIP core program content

The OIP contains six core components. The specific content you include and the formats you adopt to facilitate each will vary by cohort and program cycle. For instance, *technical assistance* may be very important for a best practice program that aims to create an actual partnership, but you might drop it from a program focussed on collaboration openness. Use this program outline as a starting point and adjust based on your program goal, stakeholder requirements, and resources.



TOP TIPS: FINALISING YOUR PROGRAM DESIGN

- **Include partners.** Once again, large enterprises and funders should give input into the program content. In particular, they may have thoughts on additional training modules they would like SGBs to have, ways that they can participate in the program (such as technical assistance or networking sessions), and onboarding and concluding activities.
- **Identify gap areas.** Returning to the onboarding survey you conducted with SGBs, identify additional needs or weaknesses that you'll need to address in your learning activities, coaching, mentoring, or technical assistance.
- **Secure external partners.** Based on the SGB needs assessment, you may find that you need to bring in external subject matter experts to present learning activity content or provide individual technical assistance. Source and secure these people as soon as possible to figure out how they will be integrated in the program.

Learning activities

The learning activities capture all the knowledge, skills, and competency development work directly provided by the ISO. ISOs are responsible for compiling the curriculum and materials, and either presenting the content or securing external presenters. For best practice, you should have a core curriculum that supports collaboration readiness in line with the results of your Ecosystem Diagnostic, which can be augmented or supplemented based on the needs assessment from the onboarding survey or input from the large enterprise partner/funder. Especially for specialised programs, ISOs may have to develop a specialised curriculum, but we recommend ISOs include these seven topics in the core curriculum.

TOPIC	SUGGESTED FORMAT	WHY INCLUDE	OUTCOMES	RESOURCES
Design thinking for collaboration	• Content presentation & workshop	Understanding design thinking and the tools it offers is hugely valuable for both the SGBs and the large enterprises. Design thinking can help them to: • Deeply understand prospective partners/ customers and their experienced problem • Adapt or position their products to fit the experienced problem, and propose a pilot • Apply an iterative process to partnership discussions and implementation that allows for continuous feedback and stakeholder feedback	• Understand the design thinking process and how it applies to partnerships and sales (namely, building deep understanding of problems and empathy for stakeholders) • Understand how to apply design thinking tools to deeply understand prospective partners and their experienced problem (Customer Persona, Customer Journey, Empathy Map) • Discuss how to leverage mentors/ current stakeholder contacts to gather insights • Discuss how practices of rapid prototyping and iterative design apply within the context of building partnerships	Empathy Map explainer video Empathy Map template B2B Persona template Stanford D.School free resource library IDEO free resource library Customer Journey Map template Why Design Thinking Works on HBR

TOPIC	SUGGESTED FORMAT	WHY INCLUDE	OUTCOMES	RESOURCES
Collaboration readiness	• Content presentation & workshop • Fireside chat (entrepreneur) • Panel discussion (local corporate leaders & entrepreneurs)	Entrepreneurs need to build an understanding of what collaboration with large enterprises looks like in your ecosystem, and the steps they'll need to take to prepare for, secure, and manage a partnership.	• Understand different types of collaboration between SGBs and large enterprises (local case studies from enterprise and SGB perspective) • Determine value propositions for collaboration and SWOT of a collaboration	Value Proposition Canvas template Collaborative Innovators facilitator toolkit, particularly look at the Collaboration Readiness Assessment (Module 1, Session 2, slides 18–22) The Giving Practice Collaboration Readiness Assessment Checklist Collaboration Readiness Tool
Market validation	• Content presentation & workshop	Market validation is the process of testing assumptions and hypotheses with prospective customers. SGBs should use the program period, and particularly their mentor relationships, to determine the assumptions they have about how the organizations can work together and leverage the mentor's network (internal and external) to test those assumptions.	• Understand how to identify assumptions and hypotheses as they relate to collaboration with large enterprises. • Determine a plan to test these assumptions and understand methods for gatherings information. • Understand what an MVP for the collaboration looks like	Assumption Test card MaRS Customer Validation approach

TOPIC	SUGGESTED FORMAT	WHY INCLUDE	OUTCOMES	RESOURCES
Big organization sales	• Content presentation and workshop (B2B sales expert) • Fireside chat (entrepreneur) • Panel discussion (experienced large enterprise professionals and founders)	No matter the type of partnership that SGBs are looking to develop with large organizations, they need to be able to sell their value proposition. Selling to large organizations is a skill and an art, and it is completely different to selling direct to customers. This should be a major theme throughout your program.	• Understand the key differences between B2C and B2B sales, and the fundamental principles of selling to a large enterprise.	Assumption Test SPIN Selling Mastering the Complex Sale
Partnerships	• Panel discussion (large enterprise and startup founders with first-hand partnership experience)	SGBs need to understand the technical and practical aspects of partnering with a large enterprise, and what to consider when negotiating the terms of a partnership.	• Understand the different types of partnership • Understand the risks of partnering with a large organization (what can go wrong)	McKinsey's Strategy for Startup-Corporate Collaboration Founders Factory on Startup-Corporate Partnerships Venture For All article on Startup-Corporate Partnerships

TOPIC	SUGGESTED FORMAT	WHY INCLUDE	OUTCOMES	RESOURCES
Piloting	• Content presentation and workshop	Depending on the maturity of the startups and large enterprises you're working with, they may propose a pilot to the large enterprises.	• Understand the benefits of proposing a pilot • Understand how to determine scope and budget for a pilot, and how to manage and measure	SAIS Challenge Guide, (pages 66–75) Recipes for agile projects Everything you need to know about pilot projects How to scale a successful pilot project
IP	• Content presentation & Q&A (subject-matter expert)	It's important for SGBs to understand how to protect their IP when looking to collaborate with large enterprises.	• Understand what is considered IP and how IP is co-created during a partnership • Understand how to protect yourself in initial discussions, when to seek legal advice, and how to navigate corporate legal requirements	LawDepot – in particular, their NDA and MOU templates Some resources on IP rights: Skipso, StartUs Insights

Your learning activities will most likely be virtual, whether you plan to use synchronous tools, asynchronous tools, or a combination of the two. There are lots of best practices for designing and presenting virtual learning content, and you can check out the Resource Roundup for additional guidance. But there are a few tried and true rules that should be top of mind as you assemble your virtual content.

TOP TIPS: VIRTUAL LEARNING ACTIVITIES

- **No hybrid formats.** As we explained with onboarding, you need to commit to the same presentation format for the entire audience/participant group. Either everyone is on-site or everyone is online. Hybrid events open the door to technical challenges and reduce engagement as the different media can become a distraction.
- **Be prepared and do dry runs.** Compiling detailed agendas and briefing participants become even more crucial with virtual programing where people can't easily ask you questions or get help troubleshooting. Dry runs ensure that everyone is on the same page with the platform, user tools, and session requirements.
- **Have tech support.** If possible, have one team member that's just available for tech troubleshooting and testing during every session. If you're presenting or moderating the session, you will not be able to run technical support at the same time – get a buddy!
- **Have facilitation support.** Similarly, there should always be a team to aid with engagement/breakout facilitation if you're including those features. Passing the ball to other team members during a workshop is a useful way to make sure that all your bases are covered. It also breaks up the presentation to boost engagement.
- **Think big with speakers and contributors.** You aren't constrained to local speakers and presenters for your virtual workshops. And you would be surprised how willing people are to share when they can do it from the comfort of their office or home.
- **Make presentations interactive.** For webinars and presentations, make full use of the tools that stimulate audience engagement: breakout rooms, polls, and chats. To increase retention over the course of the program, participants need to feel engaged by these sessions. ISOs can use polls or breakouts throughout their learning activities to monitor engagement and make adjustments as needed.
- **Facilitate engagement.** Encourage ongoing engagement during and after the program. WhatsApp groups are great for this. They can also be used to bolster virtual workshops with active sharing of links and chats on WhatsApp during virtual sessions.
- **Prepare, prepare, prepare!** We can't emphasise more the need for careful planning and thoughtful facilitation – not just for the integrity of the learning experience, but for the professionalism of the program. Virtual sessions are difficult and you won't be able to improvise once you go online. Have a detailed workshop plan in place and anticipate problem areas.

COLLABORATION IN ACTION: MAKING A FLEXIBLE LEARNING PROGRAM

Previously, we recommended compulsory attendance for core program learning activities and the importance of communicating that expectation with SGBs. However, StartHub took a different approach with its learning workshops on their OIP Uganda. Rather than mandating attendance, they make all learning activities optional, giving SGBs the power to decide if they need that information or not.

Even after adjusting the learning content based on their SGB needs assessment, they feel it's important to allow for the possibility that not all participants will benefit from every workshop. "This is not school, so we make it flexible for them to opt in or out," explains StartHub co-founder Laura Althaus-Mugagga.

This flexible approach allows SGBs to have greater control over their OIP journey, manage their resources better, and take more responsibility for their needs, which can be beneficial for attracting self-starting SGBs who are serious about collaboration.

StartHub

Coaching

Coaching is one of the key mechanisms of program facilitation. Coaches are accountability partners that hold the thread of the program and help keep teams on track with their open innovation journey in very practical terms. Coaches will also report back to program managers on engagement of SGB participants and areas for additional support. ISOs may choose to run group coaching sessions or individual sessions.

Although coaches are the primary source of support for SGBs, SGBs are responsible for their own participation, engagement, and compliance. Coaches are there to encourage engagement and progress towards goals.

Given their support role, coaches need to have a deeper understanding of the program and its systems, which is why the best practice is for ISOs to provide coaches from their team. However, if yours is a small organization, you may want or need to include external collaborators as coaches on your program. Working with external coaches who are committed to your program and supporting entrepreneurs can be a great way to strengthen relationships with professionals in your innovation ecosystem, which can support open innovation in the future.

In either case, ISOs should recognise that coaching is a demanding activity that most perform on top of their core work tasks. For best practice, you should assign a single coach to each SGB so that coaches can focus on the unique needs of a team, and will continue coaching in future.

COACH RESPONSIBILITIES

- Introduce SGBs to the large enterprise and their mentors
- Encourage program engagement and experience sharing between SGBs
- Set milestones and help SGBs access other support/technical assistance available to them through the program to achieve these
- Monitor progress along key program goals (e.g. collaboration readiness) and performing M&E
- Help teams be prepared for the final demo/pitch

Check out the Coaching Guide in the Resource Roundup for more tips.

COLLABORATION IN ACTION: THE ROLE OF THE ISO IN MENTORSHIP

In a typical innovation program, ISOs provide both coaching and mentorship to their participants. However, the OIP shifts the responsibilities of the ISO towards a more facilitative role. As Yunus Social Business's Senior Director Sergio López Ramos describes it: "Get the conversation going and then step back."

Ideally, coaches should provide minimal support for SGBs, connecting them with their mentors, and step back to allow large enterprises and SGBs to manage their own relationships. This is what Yunus Social Business achieved.

However, the reality is that not all mentorships are successful and there can be a few reasons for that, including mentors not prioritising their role with SGBs. In these cases, SGBs should not be abandoned. This is where the ISO, via its coaches, should be prepared to step in and help. Consider offering a mentor training workshop as a service to the large enterprise partner or facilitating a similar training for the employees. Alternatively, coaches can source additional mentors or technical experts to supplement the SGB's mentoring activity.

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Mentoring

Mentoring is a knowledge-sharing activity that supplements the formal training modules in the program. Ideally, the OIP mentors will be team members from your large enterprise partners. They should have first-hand experience with the challenge identified and direct access to the wider team and decision-makers.

Suppose this is not possible and the large enterprise cannot make mentors available. In that case, you'll need to recruit mentors with significant corporate experience and, ideally, sector experience (be mindful of conflicts of interest). As with coaching, it's ideal to have one mentor assigned to a single SGB to focus on the team's unique needs.

While coaches play more of a program facilitation role, mentors help the SGB to develop a deep understanding of the challenge, the organization, and the opportunity for collaboration. For this reason, the large enterprise partner is usually directly involved in providing the mentorship. In particular, mentors should prepare SGBs to make their pitch at the end of the program. Mentors can use some of the same tools and materials that ISOs use in their partnership development process to assist with different collaboration topics.

Mentorship is valuable for both the immediate program goals and the long-term development and collaboration readiness of the SGB. Even if SGBs don't land a partnership on the program, the mentorship experiences can set them up for success down the line.

MENTORSHIP TOPICS AND TOOLS

- Understanding the problem experienced and wider organizational structure
- Value propositions for collaboration
- Understanding decision-makers – Customer Journey Map, Persona
- Cultivating collaboration – Partner Development Canvas
- Technical topics: procurement processes, legal compliance, accounting practices
- Team development and collaborative work
- R&D strategies and processes
- Network sharing
- Industry trends, events, and changes
- Pilot programs, if relevant

COLLABORATION IN ACTION: BRINGING IN EXPERT MENTORS

Especially for programs designed for more mature SGBs that are firmly on the path to partnership, bringing in external experts can be very helpful for participants. BongoHive works closely with ecosystem stakeholders to provide mentoring to startups on their programs. In particular, one of their best collaborations has been with consulting firm PwC, which they have worked with for 12 years. PwC mentors their startups on technical issues of accounting and tax compliance.

BongoHive

TOP TIPS: SECURING AND EQUIPPING MENTORS

- **Start the conversation early.** Mentoring work is unpaid and typically performed on top of other work responsibilities. ISOs therefore need to negotiate employee involvement with the large enterprises early on to ensure expectations are clear.
- **Highlight the value proposition.** Equip partners to attract good mentors by sharing the benefits for mentors, emphasising the mutually fulfilling nature of this work. Professionally, mentorship can allow employees to expand their own subject matter knowledge, bolster their CV, and expand their professional network. On a personal level, employees can develop their leadership skills, build confidence, and increase job satisfaction and sense of purpose.
- **Set expectations for mentors.** It's important to clearly define the codes of conduct and expectations of the mentor and mentee before they begin their journey. Alongside general code of conduct considerations, start with the basic shoulds/should nots in the table below.
- **Set expectations for SGBs.** As the primary beneficiaries in this relationship, SGBs are responsible for leveraging this relationship, asking questions, and making the most of their time with mentors.
- **Plan for worst-case scenarios.** Realistically, not all mentor-mentee relationships will go smoothly. ISOs should ensure that mentors and mentees have a way to voice their concerns privately. Set up a protocol for how to tackle any issues that may arise. Determine the severity of the issue and the best course of action.
- **Prepare mentors.** You can support mentors to work well with SGBs by equipping them with guidelines. For a good example, check out the Mentoring Guide in the Resource Roundup.

COLLABORATION IN ACTION: UNLOCKING VALUE FOR MENTORS

Good mentoring is a demanding task and you want to make sure that mentors are up for the job. Part of getting them on board and keeping them engaged is making sure they know how much they will gain from the process. Mentoring is a two-way relationship and mentors can benefit in different ways than mentees.

On the Fight for Access Accelerator, Yunus Social Business noticed how the mentors from the Reckitt team gained different things from the experience:

- An introduction to social business, which they found energising
- An opportunity to leverage their skills, which was fulfilling
- An opportunity to give back and "do good"
- A new and different perspective on their own jobs and work, and the value of it
- Learning how to be authentic (part of the Yunus Social Business value set), which was enjoyable and something they wanted to do more in their own work

Although Yunus Social Business is a uniquely values-driven ISO, all these experiences could be easily translated for an OIP centred on the value of collaboration. Look for ways to communicate this to mentors and involve them in the collaboration learning activities.

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A mentor SHOULD:

- ☑ Share honest but empathetic business advice
- ☑ Share experiences through stories and examples
- ☑ Offer motivation when the mentee has doubts
- ☑ Challenge the mentee to step outside their comfort zone
- ☑ Listen actively to provide useful feedback

A mentor SHOULD NOT:

- ☒ Teach specific tasks, such as financial calculations
- ☒ Make decisions for the mentee
- ☒ Act as a therapist – keep problems professional
- ☒ Lecture the mentee – this should be a discussion
- ☒ Only listen – provide advice as well

Adapted from Launch League's Mentoring Guide

Technical assistance

Technical assistance is a minor component of the program, intended to supplement SGB learning in support of their collaboration goals or solution development. Common areas of technical assistance are:

- legal
- finance and accounting
- sales

The extent of technical support is dependent on your program budget and the needs of your cohort.

SPOTLIGHT: LEGAL ASSISTANCE

Legal expertise is expensive, but establishing the right legal foundations is key for protecting SGBs. It will also help to build trust between SGBs and their partners.

One key legal consideration is intellectual property (IP), which is at the heart of the solutions that SGBs will be developing or customising with their partners and must be protected. The OIP content recommends educating SGBs on IP law. But over and above this, ISOs should invite a patent lawyer from their networks to provide assistance. Take care that any external experts you invite for this purpose are a neutral party.

Unlike the learning activity content, technical assistance should be facilitated with individual SGBs with practical goals in mind. ISOs can gauge demand for this assistance in their onboarding survey and can schedule interventions on a case-by-case basis.

Unless you have in-house expertise, you will likely need to source external experts to assist on the program. In the spirit of open innovation, you should approach potential ecosystem partners with the benefits they can get from participating. For example, commercial lawyers can be persuaded to offer pro bono consultations for an opportunity to engage potential clients.

Networking

Networking activity is embedded throughout the OIP, which promotes engagement between different ecosystem stakeholders. Participants are likely to network informally as they pursue their goals, but ISOs also have a role to play in facilitating specific types of networking and should formally plan for it in their program designs. They should create spaces and activities that support dialogue between the SGBs in the cohort. Peer-to-peer mentorship and co-learning can be a major leverage point for growth: if ISOs provide the space, SGBs can do the work of helping each other to solve problems, learn, and become more collaboration-ready.

Facilitating effective networking activities ties back to the principles of good community management: picking the right platforms, setting them up properly, and ensuring participants have access. And all of this is introduced in the onboarding phase, so revisit Chapter 4 for more on encouraging connection between participants.

FORMATS FOR FACILITATING PEER NETWORKING

Forums where SGBs can lead self-guided discussions with each other (e.g. Slack channels, WhatsApp groups, or digital bulletin boards)

- Regularly scheduled mandatory check-in events, either with the full cohort or matching different SGBs up
- In-person networking events (either at the ISO's hub or at remote sites where SGBs might be clustered)
- Ad-hoc recreational events that get participants out of the office or Zoom room and into a space where they're having fun or being active (e.g. a hike)
- The creation of an alumni network where SGBs can engage after leaving the program (using preferred platforms such as Linked In, WhatsApp, or Facebook)
- For ecosystem networking, hosting fewer formal presentations, workshops, or webinars on niche topics that push outside the box of the core collaboration readiness curriculum.

COLLABORATION IN ACTION: FACILITATING CONNECTION

Although Yunus Social Business hosted a mostly online program in South Africa, they also feel strongly about using in-person meetings to strengthen relationships at strategic points in the program, namely the kick-off and the final pitch event. They're quick to point out that ISOs are responsible for facilitating these events and insisting that participants get in the same room.

"Hubs need to be prepared to make all these initiatives happen. Corporates can't or won't do it because in the beginning, they don't understand it," says Jo Bautista, Business Development and Communications Manager at Yunus Social Business.

No one understands the OIP better than you. Your job is to create the spaces for your partners and participants to develop their own understanding of the value of collaborating, interacting, and learning from others. This also means encouraging a systems-thinking mindset and helping everyone feel able to share knowledge and skills with one another.

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Pitch session

The OIP should conclude with a pitch event that allows SGBs to showcase the collaboration opportunity to a decision-maker at the large enterprise. The pitch session or demo day is the culmination of a particular open innovation journey. It should directly align with the challenge statement(s), be tailored toward large enterprises, and reflect a collaborative development process. This is to satisfy the goals of the large enterprise partners, who are searching for practical and scalable solutions, and the SGBs, who are looking to work with large enterprises.

To keep SGBs on the same page with their pitch format and content, ISOs should give them a framework. Coaches can ask SGBs to prepare six to seven slides on the following topics.

Along with the Welcome Workshop, the pitch session is a major opportunity to bring all the program stakeholders together and kindle excitement about open innovation. It's an important time to celebrate the achievements of the SGBs over the course of the program, and reflect on their learnings and progress. A well-executed final event can encourage partners to engage with the ISO in the future, such as providing experts and mentors. ISOs should therefore make the most of this event by making it special and memorable.

In addition to the pitch event, you should host a final call with the full cohort. This is important for tying up loose ends on the program and for preparing participants for the post-program survey.

PITCH DECK FORMAT

- **Introduction** to team & business track record
- **Value propositions** for large enterprise(s), SGB, and other stakeholders
- **Risk analysis/SWOT**
- **Outputs and outcomes** of the proposed collaboration
- **Inputs and resources** required
- **Pilot proposition**
- **Next steps**

Jump to Chapter 6 for more on the M&E strategy

COLLABORATION IN ACTION: COMING TOGETHER, AGAIN

As we discussed in Chapters 4 and 5, you will most likely use a virtual format for your OIP. But this should not stop you from including some in-person activities, especially for the final event. It can be very powerful to see SGBs demo their solutions on-site, particularly for regional programs that centre on a highly localised problem. For the Moka Smart City challenge, which was extremely light-touch and did not feature formal training or mentoring, all communication and challenge coordination was performed remotely. However, Turbine made provision for five finalists to fly to Mauritius for the final pitch.

turbine
enabling innovation

RESOURCE ROUNDUP: PROGRAM DESIGN

- Startup Toolkit by MaRS. This portion of the MaRS Startup Toolkit focuses on customer validation processes.
- Building Mentoring Cultures & Effective Mentoring of MSMEs by Mowgli Mentoring.
- Making the Most of a Mentor from Launch League. This is a guide for entrepreneurs to understand the role of the mentor, and how to leverage this relationship, with practical exercises.
- Miro design thinking templates and workshop templates for virtual collaboration.

CHAPTER 6

Evaluation & reporting

6.1 Before you start

Measurement and evaluation (M&E) is a critical component of your Open Innovation Program. It's the data collection, analysis, and communication that tells your funders and partners the value of what you do. It's also a way for you to learn about and improve your open innovation offering over time.

Recalling the introduction to open innovation in Chapter 1, programs like this have a theory of change, which clearly lays out the steps between program activities and your ultimate goal. This is the development work of ISOs, which is about **creating a desired change** for the people we work with and the ecosystems we work in. But the steps in the theory of change give us more than just descriptive outputs, such as how many SGBs participated in a program. Rather, they're linked to more meaningful statistics such as how many SGBs formed partnerships, and qualitative shifts in thinking and behaviour, such as increased confidence levels. These outcomes – results – can be measured, just like simple outputs.

The theory of change is a logical series of expanding outcomes, showing how you believe your activities lead to change over time. Here's a quick recap of the theory of change outcome levels:

- **Short-term outcomes:** changes in skills, attitudes, and knowledge (because of the activities undertaken on the program)
- **Medium-term outcomes:** changes in behaviour and decision-making (because of the new skills and knowledge gained)
- **Long-term outcomes/goals:** changes in status or life conditions (because of constructive behaviour and better decision-making)

To have an effective M&E strategy that measures the meaningful outcomes of your OIP, your program activities need to be clearly linked to the theory of change. Building on the principles for program design we explored in Chapter 5, all your program activities should meet three criteria:

1. Activities must have a **logical connection to the short- and medium-term outcomes.** They must be the right activities for achieving the expected results.
2. The program should comprise the **minimum number of the most effective activities**. Leave out any activities that will NOT directly contribute to the program goals.
3. The activities should help participants build the confidence, competencies, and skills that will make it more likely to **achieve the longer-term outcomes**, even if your ISO is no longer directly supporting the process.

A well-designed program aligned with a logical theory of change allows you to more confidently assume that changes measured through the program will play out as predicted over time.

Customise your theory of change

You may find that the overarching theory of change proposed for the OIP in Chapter 1 is too high-level for your own context- and sector-specific program. Or your ecosystem is very early-stage, so your longer-term goal is simply to increase large enterprise's comfort with the idea of SGB collaboration. In this case, you may want to rework the theory of change to be more useful to you.

Outcomes are the results you want to see from the activities you undertake in your program.

Activities

- Recruiting partners
- Selecting SGBs
- Partnership matchmaking
- Mentorship from large enterprise partners
- Learning workshops or coursework from ISOs
- Coaching from ISOs
- Knowledge exchanges among ecosystem players
- Partnership pitch sessions

Short-term outcomes (~1 year)

- SGBs have a better understanding of their problem and market
- SGBs understand how to work in collaboration with partners
- SGBs have skills and knowledge to develop new/more partnerships
- Large enterprises understand how SGBs can solve their problems

Medium-term outcomes (~2-3 years)

- SGBs have access to market via partnership
- SGBs have new partners, or more paratnerships
- Large enterprises are deriving value from SGBs partnership
- Large enterprises have new SGBs parterners, or more partnerships

Long-term outcomes (~10 years)

- SGBs in sub-Saharan Africa are significantly contributing to the economy through successful partnerships with large enterprises

TOP TIPS: DEVELOPING YOUR OWN THEORY OF CHANGE (TOC)

- **Get team buy-in.** Workshop the TOC together with your core implementing team. By agreeing on what you're aiming to achieve with your program, the whole team will be aligned and inspired.
- **Find your building blocks.** Outcome statements are a brief description of your program results. These are the building blocks of your TOC and they will determine your indicators.
- **Look ahead.** Start with the long-term goal (top of the TOC) and work your way back to the activities. At each step, ask yourself: "For this outcome statement to be true, what needs to precede it?"
- **Make it human-centred.** Make sure that there's a subject for each of your outcome statements: *Who* is experiencing the change you're describing?
- **Less is more.** Try to have only one result per outcome statement and only four to six statements per outcome level. The power of the TOC is as much about what you DON'T do – what falls out of the scope of what you can reasonably achieve through your program – as what you do.

6.2 Deciding what to measure

Indicators are the things that you'll measure to know whether your program is successful. You probably have a list of things that your ISO always measures in your programs, such as staff and revenue changes, and improvements in entrepreneur confidence levels on training topics. These are all fair game for your M&E strategy. But there are ways you might take the intentions behind these indicators – in this case, firm performance and entrepreneur attitudes – and select indicators to suit the goals of an OIP.

Generally speaking, it's your outcome statements from your theory of change that will determine your indicators. For example, if your outcome statement is "SGBs understand how to collaborate with partners", your indicator could be "the percentage of SGBs reporting increased confidence in working collaboratively with large enterprises." The same indicator could be used to understand other outcomes, such as "SGBs have skills and knowledge to develop new/more partnerships."

TOP TIP: BEING STRATEGIC ABOUT INDICATOR SELECTION

Gear your indicators. To simplify your measurement process and keep your M&E strategy focused, you should try to limit the number of indicators and craft them to capture multiple outcomes. Try to identify four or five metrics that speak to all your outcomes.

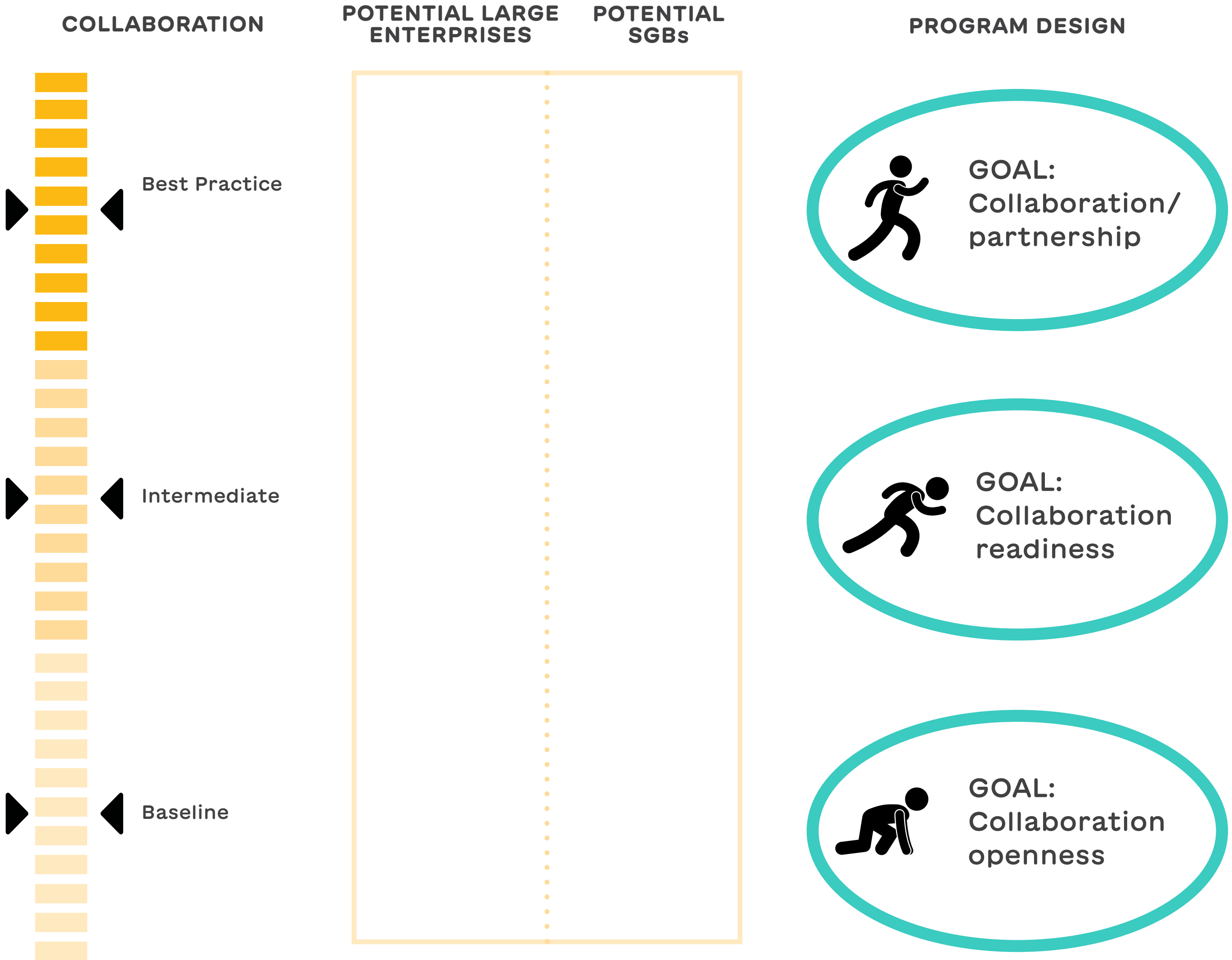
Photo by Amani Nation on Unsplash

Select indicators for your collaboration readiness level

As you are aware by now, your program will be focused on different outcomes depending on the maturity of your ecosystem. For a less mature ecosystem, the program may focus on achieving shorter-term outcomes, such as participants leaving the program with a better understanding of the value of collaboration and mechanisms to facilitate collaboration. For a mature ecosystem, the program may, or aim to, catalyse more advanced outcomes such as increased market access for SGBs via large enterprise partnerships.

Returning to the Ecosystem Diagnostic, there will be different indicators of success depending on your program goal.

Jump to the full Ecosystem Diagnostic template



Possible indicators by program goal

COLLABORATION OPENNESS	COLLABORATION READINESS	COLLABORATION/ PARTNERSHIPS
• Understanding of partner organization • Understanding of open innovation, other key concepts of collaboration, collaboration mechanisms	• Willingness and/or plans to formalise partnership • Attitudes toward the partner/sector • Change in team/product/service to suit partner • Types of desired partnership • Knowledge of compliance, legal aspects of partnership	• Number of MOAs or contracts in place • How organizations interact with partners • Satisfaction with partner's solution
Ask participants to rate their agreement (on a scale of 1 – 6) with statements such as the following: "I understand why [large enterprise name] would want to work with SGBs" for the representative of large enterprise and for the SGBs: "I understand how to identify and address challenges faced by [large enterprise name]." There should be positive movement between the same question asked before and after the program.	For example: Ask the large enterprises to rate the likelihood of collaborating with an SGB in the next 12 months. You can then add a question about what type of collaboration they foresee as an open-ended field.	Measuring signed MOAs or even contracts might be appropriate in a mature ecosystem.

Include partner impact metrics

Your funders and partners may have specific impact areas or goals that they're interested in tracking through the program. Involve them in your survey design to make sure you include indicators that will help them assess progress in these areas. In particular, remember to include these GIZ-specific indicators:

1. Number and proportion of women on the management team of the SGB
2. Evidence of a stronger focus in the SGB's business model on one or more of the following elements:

- market viability (e.g. positive financial results, funding arrangements, plans to scale up and expand)
- social responsibility (e.g. inclusive and gender-sensitive business models)
- environmental issues (compatibility with climate and environmental targets)
- business continuity arrangements in response to epidemics, pandemics, and other disasters

Photo by Windows on Unsplash

6.3 Measuring at the right time

Timing is critical for data collection. To get a clear picture of how your participants are being affected by the program, you will need to make sure you collect the right information before, during, and after the program. Here's what you need to be measuring at different points in the program:

PRE-PROGRAM

Basic info: It's always easier to get basic administrative information such as registration documents. Collect these before the onboarding phase, as soon as you inform participants of their selection.

ONBOARDING

Baseline data: As we discussed in Chapter 4, you need to take a baseline measurement as part of the onboarding phase, before you kick off the program. If the aim of your program is to stimulate a positive shift for participants, you need to know their starting points, which may be different for each one.

MID-WAY

Feedback data: If your OIP is longer than three months, you may want to do a temperature-check during the program. This can help you pick up whether the program is on track to meet objectives, so that you can tweak activities if necessary.

DIRECTLY AFTERWARDS

Comparative data: Ask the participants the same questions as you did in the baseline survey to understand whether anything has changed. You might include some additional open-ended questions to better understand why they changed and what aspects of the program were the most useful.

ONE YEAR AFTERWARDS

Longitudinal data: Partnerships are rarely quick to come together. Results may emerge months or years later. By checking in with participants a year later, you can see whether any of your medium-term outcomes have come to pass.

TOP TIP: GETTING THE RIGHT FEEDBACK AT THE RIGHT TIME

Participants can get survey fatigue. Explore using different types of tools for different uses. In particular, separate feedback about the quality of specific program activities from the success indicators you've identified through your program theory of change. For example, run a quick poll in Zoom straight after a session, so that feedback is quick and fresh, rather than sending multiple online surveys throughout the program or waiting for the post-program survey to ask about specific activities.

6.4 Using the right measurement tools

Once you've decided what you want to measure, you need to decide when and how you'll collect the information you need. Surveys will be the main tool for assessing the impact of your program. But there are several tools you might consider for different forms of data collection.

DATA COLLECTION APPROACHES

- **Online surveys:** These are easy to set up and complete – just be sure to send them while participants are most engaged, as they are also easy to ignore.
- **Real-time virtual polls:** Zoom has a polling feature, although Mentimeter is more versatile (however, you must load your slides into the Mentimeter format). You can use WhatsApp polls during or after a session, even if you're meeting in person.
- **Regular or periodic coach reports:** These can give you good qualitative data from an outsider's perspective, but be sure that all parties maintain confidentiality (you can anonymise data when reporting, if it's sensitive).
- **Check-ins:** Not all feedback needs to be in writing. Coaches or facilitators can get participants to give feedback – one-on-one or in a group – by asking open-ended questions in real time.

Design your survey

Surveys will be the backbone of your program reporting because they allow you to collect comparative data from before and after the program to assess possible changes. This means that your onboarding survey and final survey need to be well aligned, but not identical. For instance, you may want to ask additional questions about future plans and program reflections in the final survey. Different types of questions will be better suited for different indicators and information, and you should use a combination of question types on your survey.

SURVEY QUESTION TYPES

- **Likert scales:** Use a scale of 1–6 to allow participants to report their agreement/satisfaction with specific statements or questions. These are good for gauging participant experiences and attitudes in key outcome areas (or toward specific program elements), and identifying possible changes over time.
- **Multiple choice/checklists:** These are good for asking participants which training modules or program activities they attended/were most beneficial.
- **Short-form answers:** Short open-ended questions are good for collecting succinct, targeted information that can be highly individualised. Use these when you want numbers, lists, and highlights, not essays. For instance, how many new customers they have gained, what an SGB will do next, what they have changed as a result of the program, favourite program activities, or key learnings.
- **Long-form answers:** Ask open-ended questions that focus on individualised experiences, perceptions, and learnings, and allow for long answers. These are good for asking participants to reflect on their feelings about the program, their companies, collaboration, or open innovation. They are also an opportunity to ask for feedback on how to improve the program in future.

TOP TIPS: DESIGNING AND ADMINISTERING SURVEYS

- **Get the right tools.** Use a user-friendly and accessible online form, such as Typeform, Cognito, or Google Forms.
- **Plan for data storage.** Store your data securely on the cloud, protected by passwords.
- **"Enough precision for the decision."** Measure what matters; don't collect data you won't use.
- **Data will need cleaning and analysis.** Make sure you have the people and time to do this.
- **Test before you send.** Be sure to test the survey and links before you send them out to ensure that all the questions present as you want and that everything works.
- **Get the results before they leave.** Once the program is officially over and participants get back to business as usual, it will be harder to get hold of them. Send out the post-program after the demo day, but before the final cohort session, encouraging participants to submit before the final meeting.
- **Offer incentives for completion.** Offering small incentives can go a long way: books by guest speakers, free admission on future paid courses, and even vouchers for local online shops (if budget allows).

6.5 Learning to love reporting

Reporting is a requirement from funders and probably not your favourite part of the job. But you might feel more positive about reporting if you see it as a chance for your ISO to document all the work your team put in and reflect on the full process. Reporting serves three key strategic objectives for ISOs:

1. **Earning funder trust:** showing funders the impacts your program (and their resources) had on the ecosystem
2. **Increasing collaboration in your ecosystem:** identifying ways to improve your OIP and better promote open innovation in future
3. **Strengthening your ISO:** improving your team capacity and knowledge in general, and incorporating learnings into your team development and processes

Tell funders and partners how and why this work mattered

First and foremost, your report tells your funders (and other essential partners) how their resources supported the theory of change and impacted the innovation ecosystem. This is critical to maintaining a positive relationship with these stakeholders and securing their support in future. They will want to see clear, robust evidence of the positive impacts of your program, presented in a professional and easy-to-digest presentation.

Most funders also want to see recommendations as part of the report. Being thoughtful about making your recommendations meaningful and realistic is a great way to improve strategy and program design skills and earn the confidence of your funder.

Plan for your next program

Reporting allows you to objectively assess the program and its value for your innovation ecosystem. The theory of change for OIP shows that your realising open innovation in your ecosystem is a long-term goal and will definitely involve iteration. To keep advancing toward this goal, you need to accurately determine if your program worked and how far you came, so you know how to design your next program. If you excelled across indicators, maybe it's time to set the bar higher next time. If you fell short on certain outcomes, maybe you need to tweak your activities.

Remember too that impact data makes great marketing material. This can be quantitative data, like the number of new customers onboarded in a pilot program or qualitative, or like the case study of a large enterprise and SGB who had a positive experience running a co-design session together. If your results show your OIP works, it's going to be easier to attract participants and funders to your next program.

Strengthen your own team

For your current team, compiling the report offers a learning opportunity. Holding a postmortem to go through feedback before the final report gives them a chance for closure and reflection, on both the program and their own performance. If the data shows some things haven't gone well, it's a chance to improve.

Reporting also contributes to the institutional knowledge in your organization by capturing what has come before. When new people join the hub, giving them well-written, detailed reports can help you onboard them quicker.

RESOURCE ROUNDUP: M&E

Starting to Measure Your Impact by NPC. This is a comprehensive yet simple toolkit, developed through the UK-based Inspiring Impact program, that covers the whole M&E cycle of Plan > Do > Assess > Review. This series of web pages includes guidance right from deciding what data to collect, all the way through to how to analyse and communicate your results. There are plenty of templates and checklists to download along the way.

How to Develop a Monitoring and Evaluation Plan, a short article by Compass. It is important that you think through your M&E at the same time as you design your OIP. This article gives an overview of how to align M&E with program objectives, as well as offering some templates for data collection.

Rapid Guide to Designing SMART Indicators, a one-page introduction from IndiKit. A quick intro to developing SMART (Specific, Measurable, Achievable and attributable, Relevant and realistic, Time-bound) indicators for your OIP's outputs and outcomes. Go to Indikit.net to explore a database of indicators for relief and development projects, some of which may be relevant to your program.

Data Collection, a chapter from the Social Impact Navigator guide. This section of this detailed impact measurement guide takes a deep dive into collecting information about your project. If you aren't sure whether you should be using quantitative or qualitative data to answer a question, or whether you need to run a survey or take photographs as evidence, this is a useful chapter for you.

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Registered offices
Make-IT in Africa

Address
GIZ-Büro Namibia
88, John Meinert Str
Windhoek
+264 61 222447
+264 61 222427

E make-it-in-africa@giz.de
I https://www.make-it.africa/

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Lorraine Davis - Make-IT project lead
Sarah Boyd, Michelle Matthews, Elze van Achterberg - Viridian authors
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Olaf Seidel
olaf.seidel@giz.de

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MAKE-IT-IN-AFRICA@GIZ.DE