

# Program-Building Tool

## Idea Screener



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## FACILITATION GUIDE

### SUGGESTED AUDIENCE:

Relevant for teams directly responsible for innovation.

### SET-UP:

- **Group:** This exercise can be done individually or in teams of three to four people.
- **Ideas to be Reviewed:** Select anywhere from one to three ideas in your current innovation pipeline to evaluate. Make sure that you carefully edit these ideas to give people just enough relevant information to evaluate them. As a rough guide, the overviews you provide should be short and less than one page in length.
- **Customizing the Worksheet:** We've provided a list of screening criteria as a starting point based on the criteria many leading innovators use. You can add more criteria to better fit your organization if you'd like.
- **Same Idea/Same Time:** Everyone should evaluate the same idea at the same time and compare notes on *how* they scored them and *why*.

### RECOMMENDED TIMING:

- |                                 |         |
|---------------------------------|---------|
| 1. Introduction:                | 5 min.  |
| 2. Review and Score (per idea): | 10 min. |
| 3. Group Discussion:            | 30 min. |

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**40-65 min.**

### SUGGESTED MATERIALS:



Worksheets  
(enough for each participant, plus a few extra)



Whiteboard or flipcharts  
(use them to write down all group ideas; no idea is a bad idea)



Colored markers, pens, and pencils  
(separating ideas by color will help organize your thoughts)



Use this exercise when you want stakeholders to embrace idea evaluation as a strategic and objective process. This exercise is helpful if your organization so far has selected ideas based purely on gut or instinct.

## HOW IT WORKS

- 1. Designate Teams (note: if doing exercise individually, skip to Step 3):** Once all attendees are in the room, split them into their assigned teams.
- 2. Assign a Team Leader:** Ask each team to assign a “team leader” who will write the team’s thoughts on the worksheet. It’s best to have someone with the best handwriting as the team leader.
- 3. Hand Out Worksheets and Copy of Ideas:** Each person (regardless of whether or not the exercise is done individually) should have a screener worksheet as well as a copy of the ideas to be reviewed.
- 4. Review and Screen:** Ask participants to read the first idea and evaluate it based on the criteria before them. Teams should be given 10 minutes per idea.
- 5. Group Discussion:** After all ideas have been screened. Ask the teams the following questions to start the discussion:
  - Who gave a yes/go to (Idea X)? Why/Why not?
  - Were there any criteria that you felt didn’t make sense or needed better definition?
  - Were there any criteria that you felt were missing?
  - Was there information that was missing from each idea that would have helped you make better decisions?
  - How did you feel the screener worked? What would you improve or change?
  - Was it easy for your team to come to a decision to go/no go with an idea? Why?
  - What surprised you about this exercise?
  - Did the screener questions make it easier or more difficult to evaluate ideas?
  - If you didn’t have the screener, would your final evaluation decision have been any different? Why or why not?
  - If we had to develop a screener, which questions would we ask?
  - Do you think the questions provided comprehensively address a proper evaluation? Or do you think it asked too many questions?
  - Who would do the screening for our organization?



You have been selected to sit on the idea evaluation committee of your organization. You will evaluate an idea to determine if it deserves a next round of innovation funding for further research. The screener below will help you judge the idea’s potential. You will determine whether the idea meets key strategic requirements and whether or not the idea should be pursued. You will then identify clear next steps for taking the idea forward.

Think About:

- > The screener asks absolute yes/no questions. If it's not easy to commit to a single answer, give it a "YES" and note your reservations.
- > Decide as a team how many "YES" answers are required to give the idea a GO decision.
- > What do you wish you knew more about to screen this idea?
- > Try to identify clear and tactical next steps for each idea (if given a GO decision) to ensure quick development.

idea screener

idea name: \_\_\_\_\_

	yes	no	notes
<b>1. Strategic Alignment</b> Does this idea fit within our current strategy?	<input type="checkbox"/>	<input type="checkbox"/>	
<b>2. Competitive Advantage</b> Does this idea offer us a competitive advantage?	<input type="checkbox"/>	<input type="checkbox"/>	
<b>3. Customer Need</b> Does this idea meet an important customer need?	<input type="checkbox"/>	<input type="checkbox"/>	
<b>4. Markets/Revenue</b> Does an attractive market exist for this idea?	<input type="checkbox"/>	<input type="checkbox"/>	
<b>5. Capabilities</b> Do we have (or can we acquire) the resources to implement this idea?	<input type="checkbox"/>	<input type="checkbox"/>	
<b>6. Innovativeness</b> Can this idea be considered a "breakthrough"?	<input type="checkbox"/>	<input type="checkbox"/>	
	<input type="checkbox"/>	<input type="checkbox"/>	
	<input type="checkbox"/>	<input type="checkbox"/>	

decision (select one option):

**GO:** Proceed to next stage 
     
 **STOP:** File idea in pipeline 
     
 **HOLD:** Review again at a future time

next steps:

\_\_\_\_\_  
\_\_\_\_\_