PEOPLE-CENTERED INNOVATION

A SCANSION REPORT

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Introduction

When early in 2018 we looked around and couldn't find definitive data on the sector of the market that Scansion serves—that is, customer-centered innovation—we figured we weren't alone and that others would likely have the same questions as we did.

There is certainly no shortage of "innovation reports" available today. Dozens of reports focused on different types of innovation and their impact on business are readily available online from any number of reputable sources.

But for our purposes we set out to gain a clear view of the current state and trajectory of a particular kind of innovation— the kind that puts the customer at the center– and applies insights about what people truly care about to drive product and service strategy, design, and development. This is the kind of innovation we believe leads to the most meaningful and profitable customer relationships over time.

We'd heard anecdotes from friends and former colleagues about in-house teams swelling in size, while others were being shuttered after a few short years. We'd heard stories about small consultancies struggling, large ones thriving, and medium-sized ones being acquired left and right. And we'd heard reports of the most strategic innovation activities being conducted strictly in-house at companies where outsourcing or partnering used to be commonplace.

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Introduction
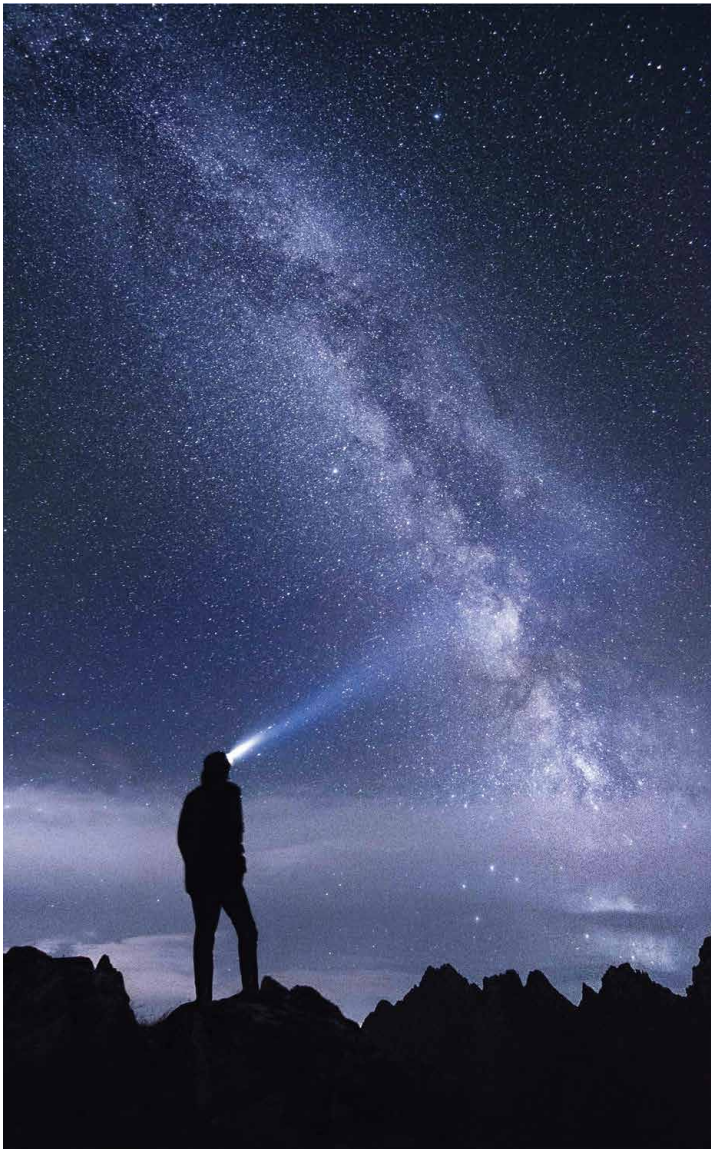
All of that aside, there were some things that we knew for sure that were influencing this market:

- The business of innovation had exploded in prominence in the past twenty years or so

- The lead-up and first year of the Trump presidency had introduced uncertainty into many markets, and corporate investment was relatively slow in the first half of the year

- Design and innovation teams within large companies were becoming commonplace, and the battle for in-house talent was in full-swing

- Skill sets that used to be held by a rare few are now practiced by a multitude of professionals

To investigate what is truly happening in the customer-centered innovation market, we surveyed and interviewed innovation leaders from over one hundred organizations. We asked them about that catalysts and success factors for innovation at their organizations. Where innovation takes place most frequently. Whether it's kept in-house or conducted with the help of consultancies. How it's measured. How much is spent on it. And whether the "innovation" business is booming or busting.

We hope you find valuable insight and guidance in this, our first Customer–Centered Innovation Report.

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The Innovation Markets:

DISTINCTIVE SEGMENTS CENTERING ON CUSTOMERS, USERS, OR JUST PEOPLE

We began this study by looking at the collected survey data and looking for emerging patterns across a diverse set of companies. We noticed companies using a variety of activities and methods to innovate which often ran contrary to their self-reported "innovation style" (e.g., tech-driven, customer-centered, etc.). Then as we interviewed some of our respondents to get a more in-depth take on their processes, we saw some key patterns emerging.

One of the first insights to bubble up had to do with language. There seemed to be a lack of clarity around what people meant by certain terms, such as "customer-centered" or "design strategy." Even the word "innovation" seems to mean everything from the development of new products to the disrup-

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tion of an entire industry through a revolutionary new business model. The term "strategy" and all of the different flavors it comes in (design, product, business, content, brand) has become an all-encompassing term used for a type of action, tactic or plan.

We realized that the language we take for granted is often unclear at best, and distracting at worst. But rather than be overly prescriptive about how language should be used in this type of work, we simply recognize that it's hard to establish a common language across such diversity of needs and industries. What is needed is a way to be as specific and clear as possible (even if it seems long-winded) so that external consultants and partners can facilitate a more productive conversation.

The study determined that language differentiation reflects crucial differences, or emergent market segments, among businesses, depending on a few key factors. These factors are intrinsic to how such companies operate overall, and determine how business people conceptualize innovation.

We realized that the language we take for granted is often unclear at best, and distracting at worst.

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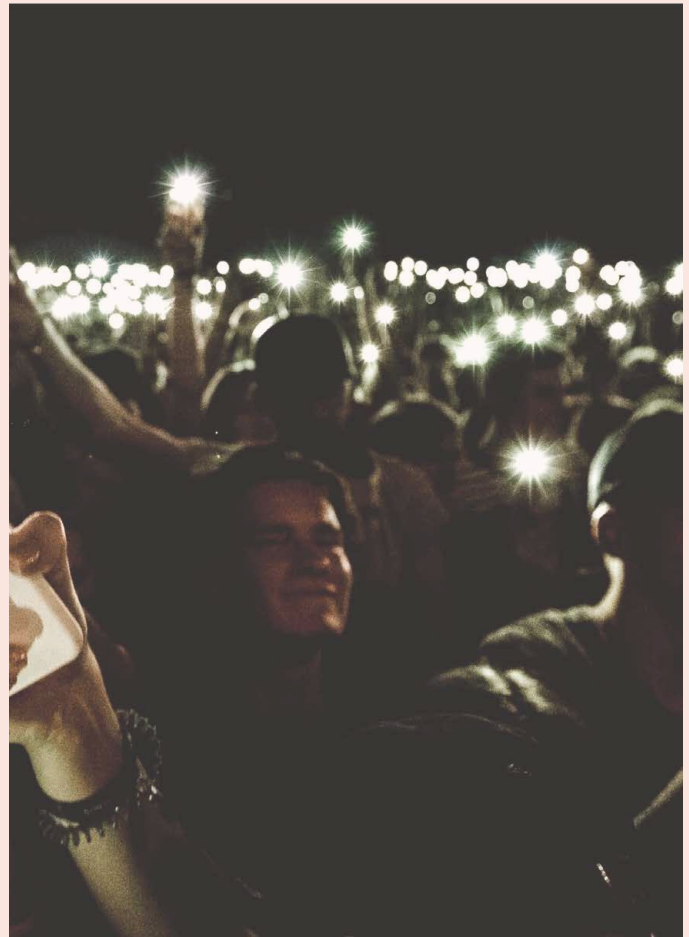
Business Model
"WHO ARE YOU SELLING TO?"

Most of our corporate respondents are a mixture of business model types (B2B vs. B2C). Even those companies we tend to think of as the "classic" consumer product companies often have alternate revenue sources and multiple customer types.

We anticipate that more consumer product companies will move into a blend (if they haven't already) as a way to diversify and stabilize revenue generation. This means that understanding the subtle blend of models and how each market influences the product or service experience of the other will be critical as this type of company grows in complexity.

Employing a blend of strategy and research techniques at the right time in concert with one another will be increasingly important as these types of businesses grow and mature.

B2B
The emphasis is often on the "user" vs. the "customer" since the "customers" tend to be corporate entities and the users are the humans. When trying to understand what motivates these corporate entities, the focus should be on the business unit's objectives and talking directly to leaders to unearth this information.

Incorporating the more traditional business analysis will give a more complete understanding of the customer goals. KPIs and key metrics are just as important with this model as the "human-centered" data.

B2C
With consumer products, the "user" and the "customer" are often one and the same. Direct feedback can be obtained through classic market or design research techniques. There is a more direct measurement of business value that can be tied to design outcomes for this type of business model. Understanding the customer's needs and desires first through foundational experience research is key to providing insightful, customer-driven direction for this type of product. Additional research and testing efforts that uncover pain points and unmet needs add greater definition to design goals. Quantitative surveys can add a layer of statistical validation to the process.

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Market Type
"WHO IS YOUR AUDIENCE?"

Enterprise

This is the least "visible" to the average person but often drives the highest volumes and revenue. The enterprise market type is often referred to as the "hidden" user because it is often not the user or customer that most people think of, but the more complex corporate or large organizational entities that use a product or service at a massive scale. Highly sophisticated and needing more bespoke offerings, this market segment leans toward high touch and high volume scale of the range. This type of company requires deep technical and industry expertise. There are often a myriad of outside consultancies, agencies, or partners working with entities like these across multiple departments and levels.

SMB (Small to Medium Businesses)

This market is the smaller business segment of the market that demonstrates characteristics of both an enterprise and a consumer business. It has its own needs and pain points around scaling and stabilizing. This market tends to have a higher acquisition cost due to the sheer volume and volatility of these types of companies and product requirements that speak to the needs of the business' industry. Outside consultants or partners most often work at the founder or C-level here.

Consumer

This is the type of market that goes direct to the consumer and tends to be more "public" facing. These are often the brands that the average person recognizes, so brand equity and general awareness is often a valuable asset. Marketing can be more traditional in the sense that employing classic awareness tactics often make the most sense here. When it comes to design thinking, strategy, and innovation more generally, marketing and product departments seem to employ outside partner projects the most.

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Industry or Vertical
"WHAT ARE YOU SELLING?"

When companies within the technology sector were asked what innovation approach was used, customer-centered innovation was the approach most often selected. But when asked to what extent each innovation approach was actually practiced, technology-driven was the innovation approach most often utilized.

Technology often leads the way with UX- or CX- focused innovation efforts. However, technology companies are becoming increasingly complex entities. Technology, in itself, is no longer a siloed vertical but a key thread that weaves into all industries and market sizes. The lines between what we consider a "technology" company and everything else are blurred and constantly changing. Despite technology's ubiquity in the business world, it needs to be tempered by the needs and desires of the humans that use it, benefit from it, and rely on it for their work. One advantage of digital technology offerings over physical goods is the room for experimentation and iteration.

Consumer products are where we see the most case study examples of design strategy success because there is a direct connection with the paying customer. Success metrics can be easily tied to customer acquisition rates, sales, retention, revenue, market share or even brand equity. But most consumer products, especially those that have any complexity in manufacturing, are difficult and even costly to adjust in the market. Consumer products benefit greatly from customer-centered research and testing to validate new concepts before going to market, which ultimately can lower production and operating costs.

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Industry or Vertical
"WHAT ARE YOU SELLING?"
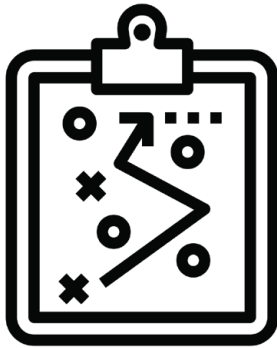
Categories such as banking/financial services, healthcare, transportation, automotive, real estate, and even food/beverage/personal care products are becoming increasingly regulated, in some form or another. Consequently, external partners hoping to work within these verticals must increase expertise and specialization in these spaces. The ability to marry industry and regulatory expertise with customer-centered innovation will be increasing in demand as these industries face greater industry-wide obstacles.

Automotive, consumer products and financial services/banking were the industries that used the customer-centered innovation approach most often.

Entertainment uses the data-driven approach, while healthcare uses the technology-driven approach.

Real estate uses both customer-centered and business-model driven innovation the most.

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Types of Innovation

PRODUCT INNOVATION
Essentially, this is the creation of new products and services and the roadmapping or product strategy that goes with it. When respondents think of "customer-centered" innovation, they think of new products or services created for the consumer market. This is also the type of innovation that gets associated with more disruptive innovation or innovation that introduces something brand new to the marketplace.

PROCESS INNOVATION
Here, innovation focuses on the method or process of making or manufacturing products or services. This can also relate to the structure of the business organization and how they do things procedurally. Our respondents saw this as a type of innovation that gets driven by leadership and tends to come more from internal partners, employees or supply chain vendors as a more incremental change that is easier to tie back to profitability and cost reduction. Often the "unsung hero" of innovation because of its lack of public visibility and press, this type of incremental innovation can have the biggest impact in a market without the customers or users even realizing it.

DISRUPTIVE/TRANSFORMATIONAL INNOVATION
This is the type of innovation that many people often associate with "Innovation" as it is the thing that completely changes the way an industry or category functions. It has the big-gest impact of the greatest number of people but can also the most difficult to replicate, implement, scale, or operationalize because of it's revolutionary nature.innovation can have the biggest impact in a market without the customers or users even realizing it.

INCREMENTAL/CONTINUOUS INNOVATION
This is the most common type of innovation we observed. This focuses on iterating or incrementally improving on the status quo and can often be the most manageable and measurable form of innovation.

"Managing the innovation process is a lot like managing a stock portfolio. It needs diversification of classes to be sustainable – incremental, substantial, and transformational."
JONATHON HENSLEY, EMERGE INTERACTIVE

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IN SUMMARY

The iterative, experimental, "design thinking" style of innovation should be seen as relevant to the enterprise business as the consumer goods companies. As more and more companies are diversifying their customer base, innovation partners need to evolve research and insights methodologies to focus on each specific type of customer. Most market and design researchers focus on the end-user. But most innovation methodologies don't appear designed to serve the enterprise customer, or to take the tools and techniques from one type of business market to the next.

It may also be appropriate, given the different targets of innovation efforts, that we refer to those targets as "people." We certainly will be, moving forward.

"Quantitative research doesn't explain why people do what they do, only what they do. Qualitative has an emotional pull and we often times use it to get our people on board."
NICK BROOKS, AUDI
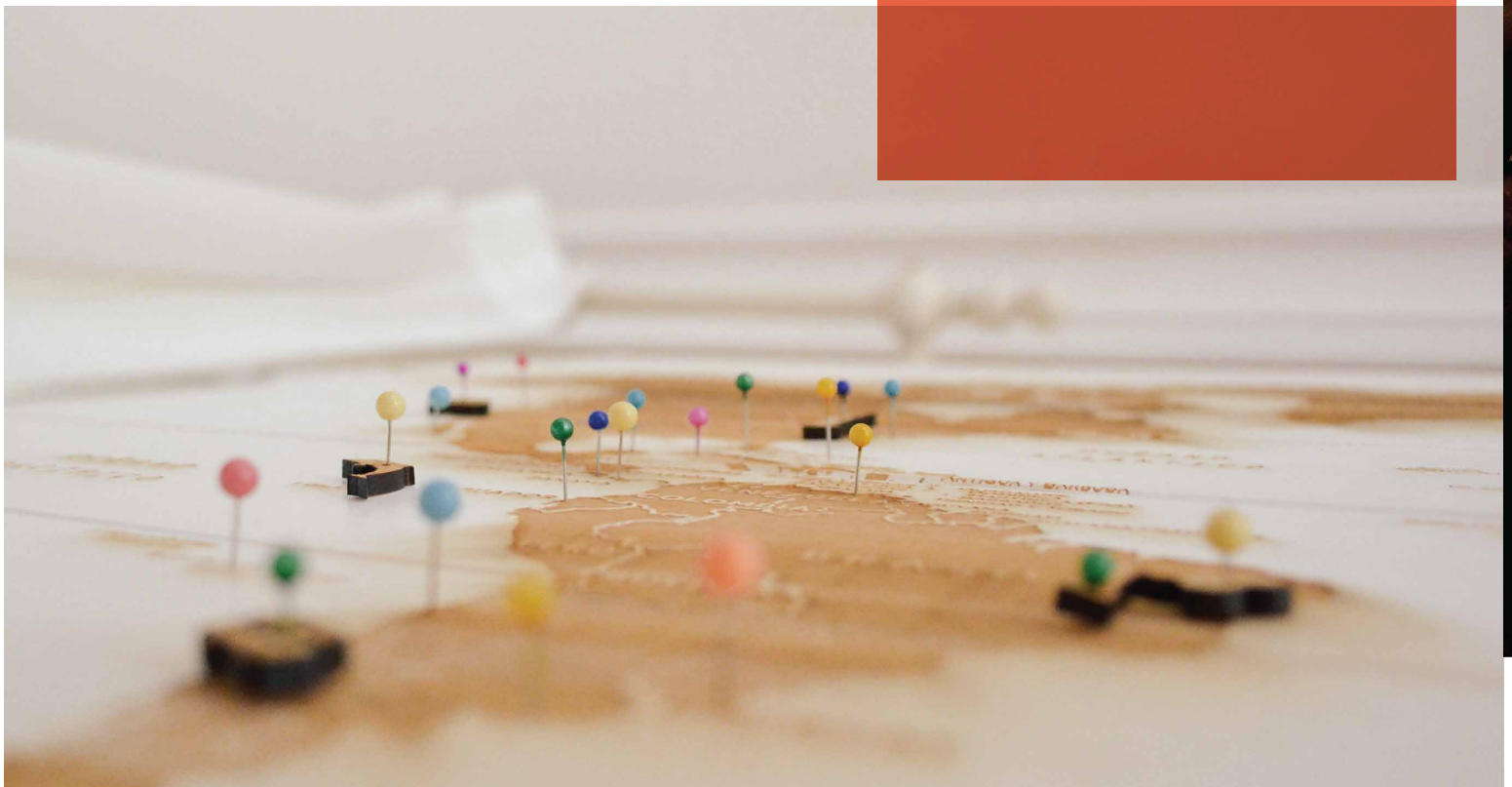
The Other Shoe:

HOW ORGANIZATIONAL CULTURE INFLUENCES INNOVATION APPROACHES

For most respondents, the need to develop new products and/or to adapt to changes in the market place are the primary catalysts for innovation. Consequently, customer-centered innovation efforts are being mostly led by product teams.

By necessity, most product teams are designed to understand and take into account the needs and wants of the customer. But if the business or corporate strategy is not aligned with the needs of the customer, whoever that may be, it makes execution all that much harder. The alignment of strategies has a lot to do with the nature of the organization's corporate culture: is it the type of place that is open to experimentation and fluidity? And are there methodological preferences depending on type of culture?

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Methodologies to create new solutions vary broadly by industry, company size, and/or internal teams' focus. While processes, tools, and resources might cover a broad spectrum, those companies that have developed a corporate culture of openness and experimentation seem to have a competitive advantage in the creation and adoption of innovative strategies. Whether by focusing on new outcomes or new processes, articulation and effective communication among teams have the most successful outcomes.

Our data indicates that effective communication and openness to new solutions could take the shape of a formal process or a more ad hoc one. Smaller companies with a strong corporate culture of innovation seem to be better equipped to organically listen to different stakeholders and incorporate their ideas into the product development process. But for bigger companies, although they often times need to develop more formal processes, are also better equipped to experiment with a broad range of tactical and novel ways to both uncover and capitalize on customer insights, and act on them in more consistently productive ways.

According to our respondents, corporate culture is, not surprisingly, generally heavily influenced by its leadership, permeating the whole organization. Those organizations that have developed effective mechanisms to listen to, understand, and incorporate customer insights in their processes, are also capable of

aligning their corporate and product strategies, which translates in increased revenue and profitability.

Many companies are bringing innovation teams inside their organizations in an effort to change their corporate cultures and become more effective at responding to changes in the market. These internal innovation teams must create buy-in from across their firms in order to experiment with new processes and operationalization of ideas. It is critical to develop credibility over time, which is often achieved by focusing on developing specific skill sets among team members ("becoming by doing") and by bringing customer insights to life in new ways.

WHAT DEPARTMENTS OR ROLES ARE RESPONSIBLE FOR LEADING INNOVATION INSIDE OF YOUR ORGANIZATION?

Product Development
C Suite
Customer Insights/Research
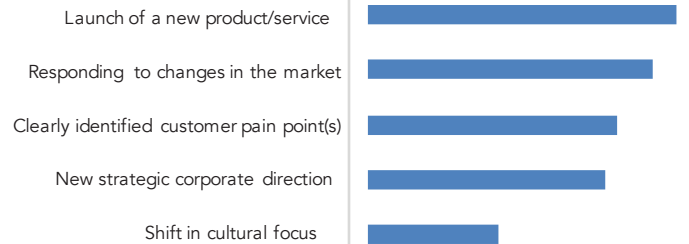R&D
Marketing
Innovation
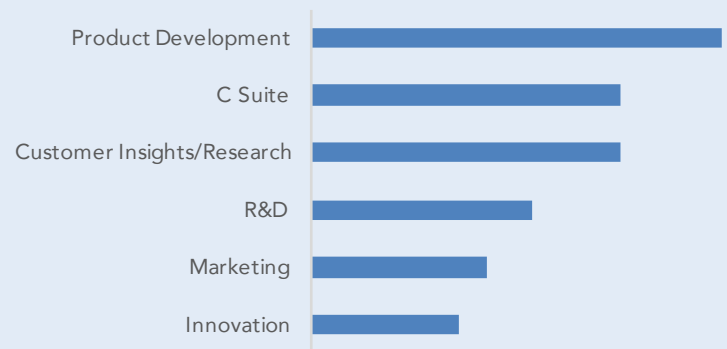
Base = 57

IN SUMMARY

One of the primary catalysts for innovation is the need to develop new products, so product teams are often in charge of these efforts. Nevertheless, often there's a misalignment between product and corporate strategies, making it difficult to implement necessary innovation solutions. Although there are many tools and resources available for teams to innovate, a corporate culture of openness and experimentation facilitates the innovation process, increasing profitability. Processes to bring people to the center of innovation vary from a range of ad hoc to formalized ones. The size of the company, along with its corporate culture, largely determines which techniques are more effective than others. Efforts to increase people-centered innovation has to have internal buy-in and develop credibility over time, often by developing specific skill sets among team members.

WHAT ARE THE BIGGEST CATALYSTS FOR CUSTOMER-CENTERED INNOVATION EFFORTS GETTING FUNDED?

Launch of a new product/service

Responding to changes in the market

Clearly identified customer pain point(s)

New strategic corporate direction

Shift in cultural focus

Base = 57

Successful projects are anchored in metrics that align with corporate culture.

FROG'S "BUSINESS VALUE OF DESIGN"

"Customers make us a better company."

AMY GUITTARD, GUITTARD CHOCOLATE COMPANY

"There are different cultures inside a company that force them to be the way they are. In order to innovate, it's necessary to develop internal buy-in and credibility over time."

ANONYMOUS

New Ways of Getting There:

TOOLS & TECHNIQUES

———————

Traditionally, innovation has depended on two primary tools...

- The gut feel of corporate managements
- The use of quantitative and qualitative research techniques to uncover and track market evolution

While these techniques remain quite common, additional tools have entered the innovation arena.

- Big Data Analysis
- Machine Learning and Artificial Intelligence
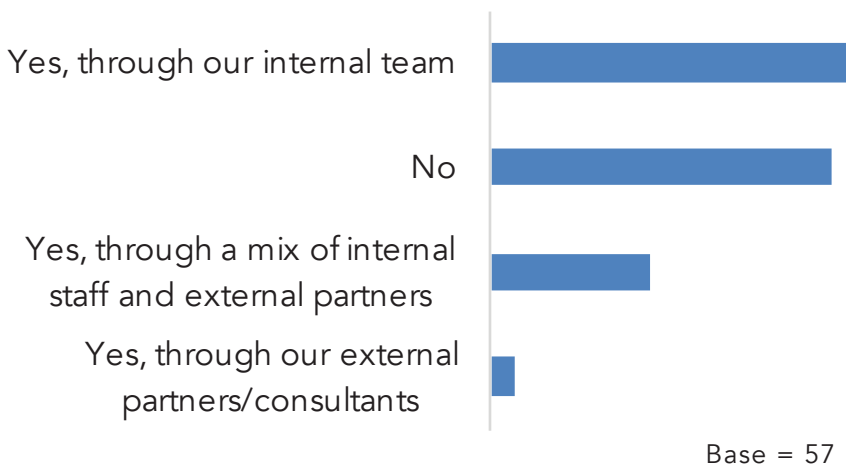- Internal teams as sources for inspiration

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Companies who utilize Big Data, Artificial Intelligence, or Machine Learning like to do this internally

The cost of data scientists and machine learning engineers is high due to the increasing competition for this talent in the technology world. The data itself is becoming increasingly difficult to protect and manage, so to keep liabilities to a minimum most companies keep this capability in-house.

Executives believe that data can tell you what is going on, and Big Data appears to respondents to offer better insights into what customers are doing than conventional measures, such as surveys. And such insights may facilitate more effective incremental innovation.

Using these tools to ask the "why" of consumer behavior, however, which is necessary for more transformative innovation, is a bit more fraught, because one has to infer intent. Data can help with prioritization but it appears that, for now anyway, only people can help with our understanding of motivations.

DOES ARTIFICIAL INTELLIGENCE, MACHINE LEARNING, AND/OR BIG DATA PLAY A ROLE IN CUSTOMER-CENTERED INNOVATION EFFORTS?

Yes, through our internal team

No

Yes, through a mix of internal staff and external partners

Yes, through our external partners/consultants

Base = 57

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Where people can add the most value in a big data world is in asking the "right" questions of the data

Using these tools to ask the "why" of consumer behavior, however, which is necessary for more transformative innovation, is a bit more fraught, because one has to infer intent. Data can help with prioritization but it appears that, for now anyway, only people can help with our understanding of motivations.

The innovation process requires problem-finding, problem-selecting, solution-finding and solution-selecting. However, much of the focus in today's business and engineering programs is on solution-finding and selection.

INNOVATION MANAGEMENT, ASKING THE IMPORTANT QUESTIONS

Employees are just as valuable as sources of innovation as customers or users

The study also uncovered interest in sourcing innovative ideas from people beyond the customer or end-user. Employees (beyond high-level stakeholders) are becoming an increasingly valuable source for ideas and insights. New ideas can be generated through the interaction of people with some direct interest and expertise in the category.

You must have strategies in place for attracting both internal and external talent to your innovation efforts.

INNOCENTIVE "HARNESSING GLOBAL TALENT"

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IN SUMMARY

These additional tools and techniques appear to have crossed from the early-adoption phase to be fairly common among people responsible for innovation. Because they offer up sharper insights into current behavior, if not their causes, they may make incremental progress easier. They also may help produce better ideas to support that incremental progress. On the other hand, for companies looking for ways to redefine their markets in their favor, these tools don't appear to offer the same, much less better, caliber of options than the now "traditional" tool of ethnographic, qualitative immersion.
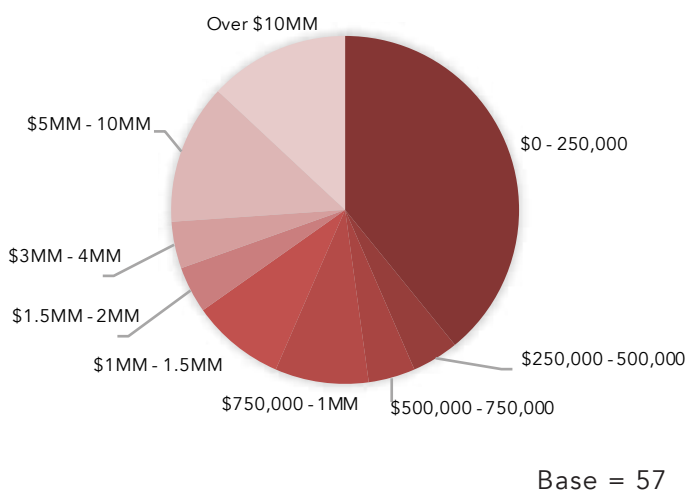
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Metrics & Money:

KEYS TO SUCCESS

When looking at how our respondents measured innovation success, we found that many didn't have a clear, consistent, and measurable way of defining a successful effort. Metrics varied widely, even within industry verticals. Company-wide investments and budgets also varied widely, but overall were much lower than we were expecting (given the amount of activity put towards these efforts).

TYPICAL ANNUAL BUDGETS

- Over $10MM
- $5MM - 10MM
- $3MM - 4MM
- $1.5MM - 2MM
- $1MM - 1.5MM
- $750,000 - 1MM
- $500,000 - 750,000
- $250,000 - 500,000
- $0 - 250,000

Base = 57

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Metrics

While innovation clearly matters, measuring the value of such innovation– to the innovators as well as end-users– remains a key challenge. Metrics such as "capability maturity models," and "balanced scorecards" are increasingly popular when it comes to measuring capacity to innovate, and standard operational algorithms can measure process efficiency.
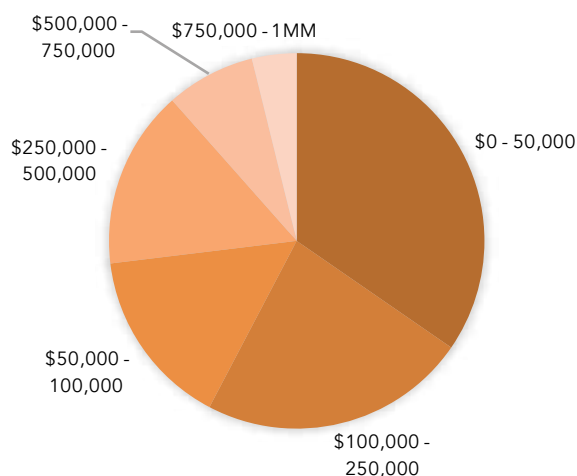
That said, most companies find it difficult to measure how well they're innovating for enhancing human experience. Simply counting the number of innovations generated, or Net Promoter Scores (NPS), don't seem to provide sufficient insights into the real value provided to people or other companies. Even if NPS, in particular, is tracked and measured, there are challenges in scaling, operationalizing, and tying it back to profitability, revenue, sales and stock price.

Money

Annual and project budgets tend to be on the lower end and vary widely based on a wide range of factors. Our data indicates that annual budgets for conventional customer-centered innovation initiatives are typically below $250k. The average project budget is below $50k. This is lower than we would have predicted, but the project budgets seem to vary based on industry.

TYPICAL PROJECT BUDGETS ACROSS INDUSTRIES

$500,000 - 750,000
$750,000 - 1MM
$250,000 - 500,000
$0 - 50,000
$50,000 - 100,000
$100,000 - 250,000

Base = 57

INNOVATION PROJECT BUDGETS BY INDUSTRY

Technology projects
- Under $50k
- Or between $250k - $500k

Automotive projects
- $100k - $250k

Consumer product projects
- Under $100k

Healthcare projects
- $50k - $100k

Financial services or banking projects
- Below $50k
- Or between $100k - $250k

Transportation projects
- $750k to $1MM

IN SUMMARY

It's probably reasonable to assume that, in the absence of effective and truly reliable measures of experiential value or probable ROI, managements will continue to find it difficult to efficiently budget for innovation activities. In the absence of such measures, budgets will probably be determined based on traditional, category-specific norms, as well as the necessity to impress the markets with companies' commitment to stay up-to-date.

"Innovation needs a better measurement of outcome or impact of what we do, in quantifiable terms. That is what will make the biggest difference in what we do."

ANONYMOUS

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Agencies & Consultancies:

SIZE APPEARS TO MATTER (AND CAPABILITY)

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Due to our relatively small sample size, we hesitate to make definitive statements about the relationship between size of agency and growth in demand. That said, it appears that larger agencies are seeing the most growth in demand for their services (self-reported). The mid-sized consultancies (26-50 employees), in contrast, are reporting the lowest or flattest growth. The smallest agencies see the widest variance in demand growth and decline.

Consultancies are most often offering some form of UX Design and Strategy– whether it's business strategy, product strategy, or design strategy. Consultancies are seeing the highest demand for customer insights and ideation, with some demand for workshops for the boutique-sized consultancies. The technique seeing the least amount of demand from consultancies is AI, which most companies are utilizing through their in-house teams applying proprietary data.
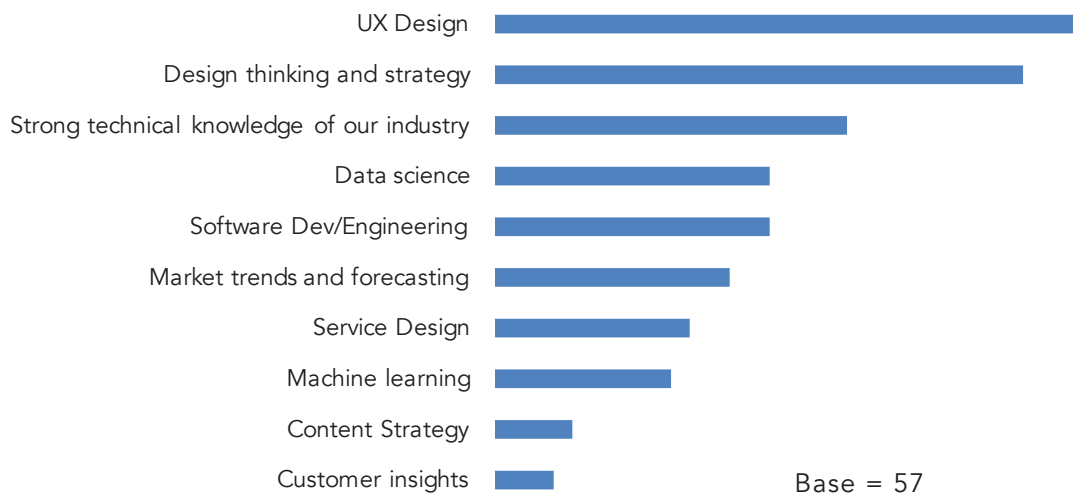
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Offerings in Demand

UX Design is the capability in the highest demand by the companies who employ these partners, mostly in the technology, automotive, consumer products and entertainment sectors. Design thinking/strategy was the second most demanded capability. Financial services/banking demands more technical knowledge of their industry and software development/engineering. Automotive and entertainment also wants market trends and forecasting capabilities, in addition to UX Design and design thinking/strategy.
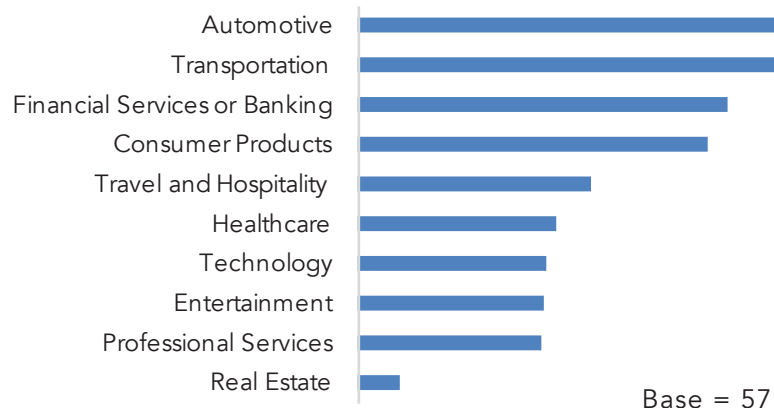
"We want to see teams that can take a question and have the chops to conceptually bringing it forward."
NICK BROOKS, AUDI

WHAT CAPABILITIES ARE IN THE HIGHEST DEMAND FOR CUSTOMER-CENTERED INNOVATION EFFORTS?

UX Design
Design thinking and strategy
Strong technical knowledge of our industry
Data science
Software Dev/Engineering
Market trends and forecasting
Service Design
Machine learning
Content Strategy
Customer insights

Base = 57

OUTSOURCING BY INDUSTRY

Automotive
Transportation
Financial Services or Banking
Consumer Products
Travel and Hospitality
Healthcare
Technology
Entertainment
Professional Services
Real Estate

Base = 57

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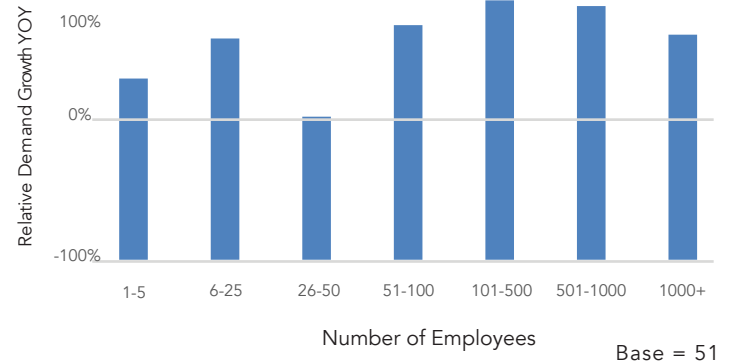
IN SUMMARY

Agencies and consultancies are seeing increased competitive pressure across the board from clients moving their capabilities in-house. The agencies experiencing the highest growth in demand tend to offer the most diverse set of capabilities and be the largest in size (uncoincidentally). The smaller, boutique agencies have the greatest variability in demand and tend to have a more focused offering. The mid-sized agencies are finding that they are either being acquired or are struggling with scaling their capabilities to meet client demands. For consultancies, having the capability to apply design solutions to meet business goals and implement strategies they propose seems to be key for combating competitive market pressures.

YOY DEMAND BY AGENCY SIZE

Relative Demand Growth YOY

100%

0%

-100%

1-5　6-25　26-50　51-100　101-500　501-1000　1000+

Number of Employees

Base = 51

"How are we optimizing the promise of digital transformation? It's not only about creating but also implementing innovation."

JONATHON HENSLEY, EMERGE INTERACTIVE

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The New Market Emerges

As we look back at the data and insights from our deep dive into the innovation market, the unifying theme that emerges is that of diversity.

Beginning with language alone, we see tremendous diversity in the ways people describe innovation—often with very similar aims. But the diversity of language in-use shouldn't come as a big surprise, since everyone views the world, or their market, or their "customers" through their own lens.

We have uncovered companies using a diverse range of approaches to innovation, depending in large part on their market type and industry. Everyone is innovating for a "customer" of some sort, but the word "customer" itself may have become problematic in its limitations. Using the term "people-centered" innovation would be more inclusive of the multitudes outside of consumer markets that clearly deserve attention.

A corporate culture of openness and experimentation facilitates the innovation process and can improve product and business strategy alignment. We observed that different departments, roles, methods and philosophies are leading innovation efforts and that processes often varied widely from the ad hoc to the formalized. Successful innovation activities require internal buy-in and credibility built over time through measurable results, which seem to be the reasons driving many companies to move this capability in-house.

We've seen great diversity in tools and methods, as a growing number of techniques are becoming mainstream for informing innovation efforts. But people will, for now, still play a key role in inferring the intrinsic motivations hidden in massive stores of data.

Finally, we've uncovered diverse ways companies are measuring success when it comes to being innovative. Measurement has never been more important, as management teams look to past returns to allocate future investments more wisely. But truly effective measurements of many innovation efforts remain difficult to identify.

The broad conclusion that we've drawn from all of this is that "people-centered" innovation isn't just one market, one mindset, or one toolkit. It's a diverse collection of all of the above. It turns out it's more like a cloud—a conglomeration of many methods, inputs, perspectives, and approaches, all united by keeping the "people" at the center.

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So what now?

Our study, as brief as it was, only touched the surface of what is going on in this deep and complex topic. The more questions we asked, the more questions we saw bubble to the surface. We could imagine others taking the study further by investigating:
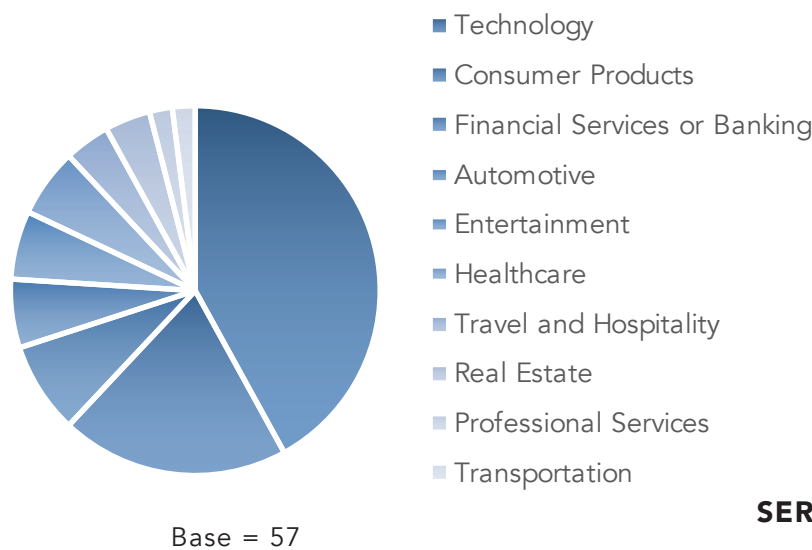
- Effectiveness of the different measurement tools and indicators

- Methods and activities for mobilizing corporate innovation culture

- Comparison between different regions, cities, and countries

- Directions of academia and workforce training efforts
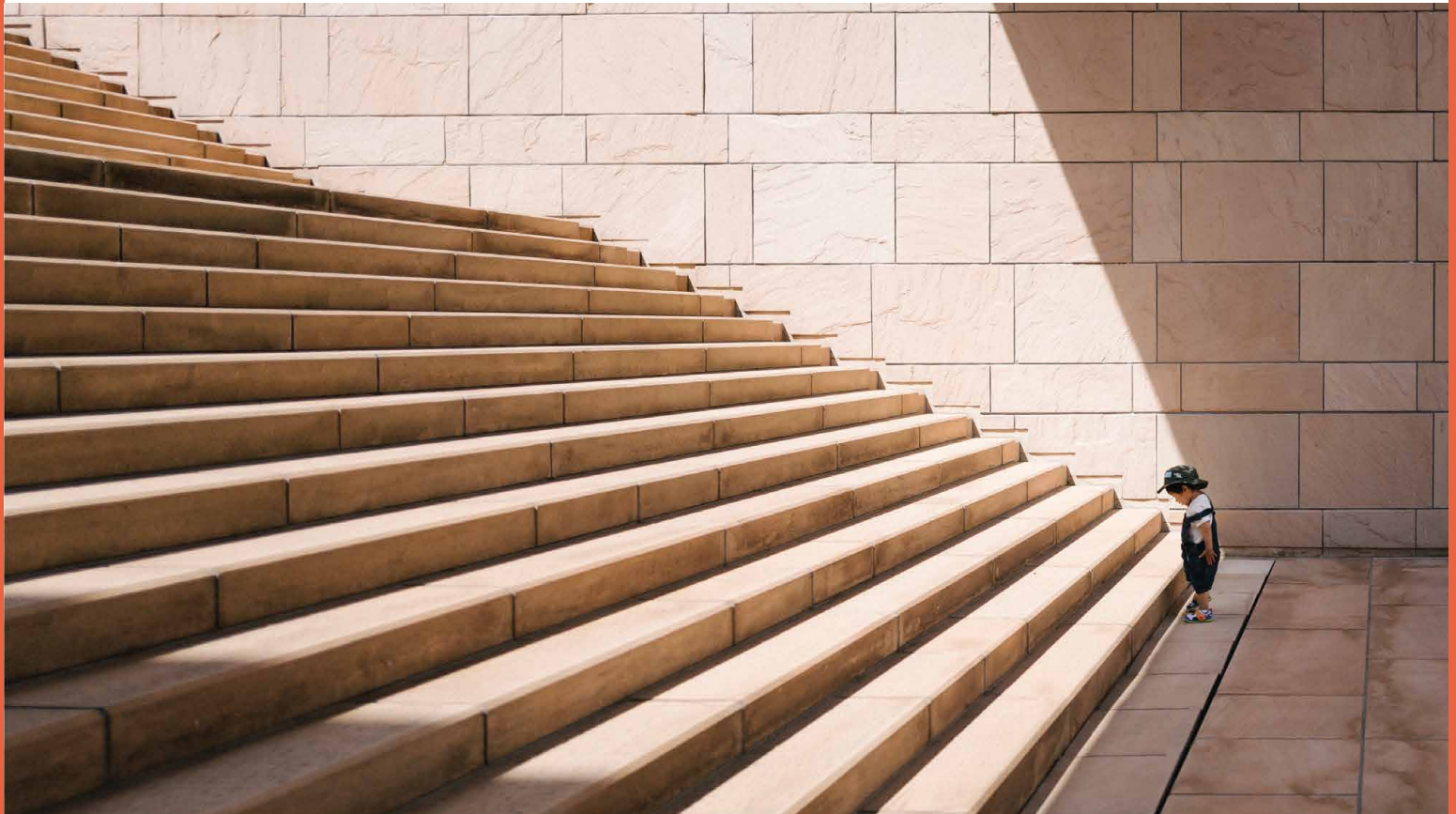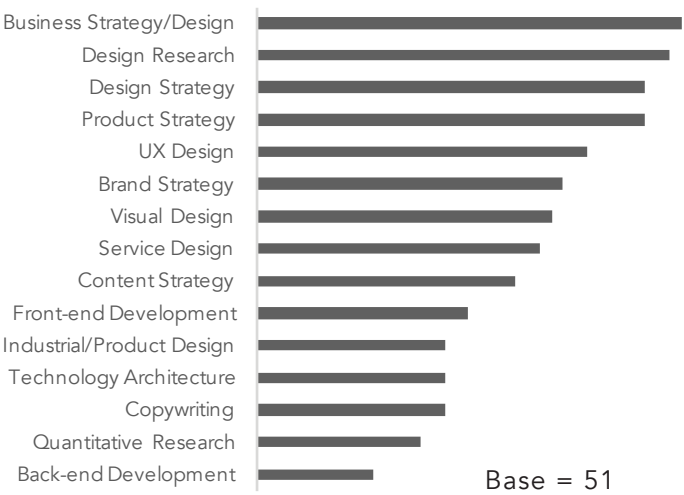
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Methodology

For Scansion's first-ever exploration of what's emerging in the Innovation space, we sought input from a wide variety of buyers and practitioners of innovation services. 110 people participated in the initial survey process from across the innovation spectrum, and 8 of those individuals participated in follow-up, one-on-one interviews. We've outlined what business categories the participants come from in the charts below.

INDUSTRIES SURVEYED

- Technology
- Consumer Products
- Financial Services or Banking
- Automotive
- Entertainment
- Healthcare
- Travel and Hospitality
- Real Estate
- Professional Services
- Transportation

Base = 57

SERVICES OFFERED BY CONSULTANCIES

Business Strategy/Design
Design Research
Design Strategy
Product Strategy
UX Design
Brand Strategy
Visual Design
Service Design
Content Strategy
Front-end Development
Industrial/Product Design
Technology Architecture
Copywriting
Quantitative Research
Back-end Development

Base = 51

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About Scansion

Scansion is a people-centered innovation firm based in San Francisco.

We work with executives to grow their businesses by planning and delivering meaningful customer experiences over time. The kinds of experiences worth living for; worth paying a premium for; worth coming back for again and again.

We offer product and service innovation strategy, customer experience strategy, brand strategy and positioning, and customer insights.

Select clients include: Fiat/Chrysler Automobiles, Cardtronics, Intel, Carhartt, AT&T, and Autodesk.

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