



Collection: **Irreplaceable** in the AI Era™

"Because leadership begins with you"

This is not just another ebook.

It's a practical guide for leaders who—amid the relentless advance of technology and artificial intelligence—seek to ensure that their leadership, decisions, and results remain relevant and sustainable.

It was conceived and written from a place of deep conviction—combining strategic clarity with the genuine love for positive impact, the personal power that comes from lived experience, and the essence of leading with integrity. Every concept, framework, and tool included here has been chosen with a single purpose: to deliver real value that can tangibly transform the way you lead and generate results.

Experience shows that most failed transformations don't fall short because of technical limitations, but because of invisible factors that silently erode performance: internal resistance, cultural misalignment, loss of strategic focus, or lack of team commitment. These rarely appear in the metrics—yet they determine the success or failure of any initiative.

In this guide, you'll find actionable tools and frameworks to help you:

- Identify and anticipate risks that can slow or derail your strategy.
- Protect and strengthen your leadership capacity in high-disruption environments.
- Use technology—including AI—as a multiplier of results, not as a replacement.
- Stay competitive without compromising your team's cohesion or your organization's future.

This resource is available in PDF format for quick reference. If you prefer the editable version, you'll find a link to the download center at the end, where you can get it in Word format and adapt it to your needs. A new ebook will be added to the collection every week—until all 25 are complete. Simply visit the download center to see what's new each week.

If these words have reached you, it's likely not by chance. You are in the right position, at the right time, and in the right circumstances for this information to make a real difference. And as you put it into practice, you may discover it could also spark transformation in others.

Because in today's era, real value lies not just in the technology you use—but in your ability to lead with vision, precision, and purpose.

2. Central Theme – Boosting Open Innovation

Open innovation is the capability to **connect external ideas, technologies and talent** with your internal strategy, assets and customers to create new value. It is not outsourcing creativity, but **curating and activating** a larger field of possibilities.

A robust open innovation strategy usually includes:

- **Partnerships** with startups and universities.
- **Corporate innovation programs** aligned with business units.
- **Events and challenges** that attract and test new ideas.
- **Investment mechanisms** (direct or through funds) to access emerging players.
- **Processes and governance** to incorporate external ideas into products, services and operations.

The rest of this ebook will help you design and scale these elements in a coherent way.

3. Initial Sections

3.1. Why Open Innovation Matters in an AI-Driven World

Artificial intelligence and other exponential technologies are changing the economics of innovation. Small, agile teams can build powerful products with relatively low capital. Universities and research centers keep generating breakthroughs. Startups test ideas at a speed that is difficult for established corporations to match.

At the same time, large organizations still hold **critical assets**: customer relationships, data, infrastructure, regulatory capabilities and global distribution. Open innovation is how you combine the strengths of both worlds.

Done well, open innovation allows you to:

- Access emerging technologies earlier.
- Experiment with new business models at lower risk.
- Attract and retain talent that wants to work on meaningful challenges.
- Build a reputation as a forward-looking, collaborative player.

Done poorly, it becomes a collection of disconnected pilots that never reach scale, frustrating everyone involved.

3.2. Purpose of This Guide – Five Objectives

This guide has five concrete objectives:

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1. **Clarify concepts:** what open innovation is, and what it is not.
2. **Provide tools:** frameworks, templates and exercises you can apply tomorrow.
3. **Offer examples:** realistic scenarios that illustrate typical decisions.
4. **Enable governance:** mechanisms to connect open innovation with strategy and risk controls.
5. **Inspire action:** help you move from sporadic activities to a sustained portfolio.

3.3. How to Use This Guide

- **Linear reading:** go chapter by chapter to build a comprehensive view.
- **Module-based:** pick a single subtopic (for example, hackathons) and use that section as a playbook.
- **Workshop toolkit:** use the exercises and templates with your leadership team, innovation office or board.
- **Reflection companion:** revisit checklists and KPIs quarterly to assess maturity and progress.

Keep a notebook or digital document open while reading. Capture ideas, potential partners and questions that arise. The real value is not only understanding these concepts, but translating them into **specific decisions** in your context.

4. Subtopic 1 – Collaboration with Startups and Universities

4.1. Definition

Collaboration with startups and universities is the strategic practice of **co-creating value** with external innovators who bring new technologies, methods and perspectives. It goes beyond sponsorships or occasional projects. At its best, it becomes a **mutually beneficial relationship** in which:

- Startups gain access to market, data, expertise or capital.
- Universities test and apply their research in real-world contexts.
- Your organization explores new solutions faster and shares risk.

The key is to move from ad-hoc interactions to a **structured partnership model**.

4.2. Practical Framework – The P.A.R.T.N.E.R. Model

Use the **P.A.R.T.N.E.R. Model** to design collaborations:

1. **Purpose** – Clarify why you want to collaborate (tech scouting, new markets, talent, research).
2. **Alignment** – Identify strategic themes where collaboration can have impact.
3. **Relationship Design** – Select collaboration formats (pilots, joint labs, co-development, licensing).
4. **Terms & Governance** – Define IP rules, decision rights, timelines and escalation paths.
5. **Networks** – Plug into existing ecosystems (accelerators, clusters, consortia).
6. **Engagement** – Assign internal sponsors and teams to work with partners.
7. **Results & Learning** – Measure outcomes and feed learning back into your agenda.

This model ensures that collaborations are **intentional, fair and sustainable**.

4.3. Applied Example (*caso hipotético*)

Imagine a financial services company that wants to explore AI-based risk scoring. Internal teams lack experience with machine learning models for unstructured data, while a local university has a research group specializing in this field, and a startup has a promising algorithm.

Using the P.A.R.T.N.E.R. Model:

- The company defines its **purpose**: accelerate development of ethical, explainable risk models.
- They ensure **alignment** with their strategy and regulatory requirements.

- They design a **relationship** where the university leads exploratory research, the startup builds and tests prototypes, and the company provides data and regulatory expertise.
- Clear **terms** define data usage, IP ownership and commercialization options.
- They tap into existing **networks**, such as a national fintech cluster.
- A senior executive sponsors the collaboration, and a cross-functional internal team is created to **engage** with partners.
- Results are assessed through improved risk predictions and speed to market, and the learning informs future collaborations.

4.4. Exercise – Mapping Your Priority Partners

Objective

Identify potential startup and university partners aligned with your strategic themes and design first collaboration options.

Roles

- Innovation or transformation leader (facilitator).
- Business unit leaders.
- Technology / data leaders.
- Legal and compliance representative.

Inputs

- Current strategic priorities and transformation roadmap.
- List of existing or past collaborations.
- Ecosystem maps (clusters, incubators, university centers).

Time

- Preparation: 3–5 days to gather data.
- Workshop: 4 hours.

Step-by-Step

1. List your top 5–7 strategic themes (for example AI in operations, new digital channels, sustainability).
2. For each theme, identify **capability gaps** or questions where external partners could accelerate progress.
3. Brainstorm potential startup and academic partners (name actual organizations where possible).
4. For each potential partner, sketch possible collaboration formats (pilot, research project, joint lab, etc.).
5. Prioritize opportunities using impact × feasibility criteria.
6. Assign owners to engage with top-priority partners and define next steps.

Deliverables

- Partner Opportunity Map with prioritized collaborations.
- Initial engagement plan for top 3–5 opportunities.

4.5. Template – Partner Opportunity Map

Strategic theme (example)	Potential partner (startup/university)	Collaboration format (pilot, joint lab, etc.)	Expected strategic impact (1–5)	Feasibility in 12 months (1–5)	Internal sponsor
AI for risk scoring	FinTechX (startup) + University Analytics Lab	Pilot + research project	5	4	Chief Risk Officer

4.6. Checklist – Healthy Collaboration with Startups and Universities

- ☐ Purpose and expected outcomes for each collaboration are clearly documented.
- ☐ There is a named internal sponsor for every external partner.
- ☐ IP, data usage and confidentiality terms are defined and understood.
- ☐ Collaboration formats are realistic for both sides (scope, timing, resources).
- ☐ Feedback mechanisms exist to refine collaboration based on learning.
- ☐ Successful collaborations can scale beyond a single pilot.

4.7. Suggested KPIs – Collaboration Effectiveness

- Number of active collaborations with startups and universities.
- Percentage of collaborations directly linked to strategic themes.
- Time from first contact to signed collaboration agreement.
- Conversion rate from pilot to scaled solution.
- Value generated (for example revenue, cost savings, risk reduction) from collaborative initiatives, where measurable.

5. Subtopic 2 – Corporate Innovation Programs

5.1. Definition

Corporate innovation programs are **structured mechanisms** through which your organization identifies, selects and develops new ideas—often in partnership with external actors, but anchored in internal priorities. Examples include accelerators, incubators, venture builders, and challenge-based programs.

The goal is to create a **repeatable pipeline** of opportunities, not one-off events.

5.2. Practical Framework – The F.L.O.W. Program Blueprint

Use the **F.L.O.W. Blueprint** to design or refine your programs:

1. **Focus** – Define the strategic domains, problem statements and target participants.
2. **Logistics** – Establish program length, stages, budget, and support services.
3. **Ownership** – Clarify governance, decision rights and sponsorship.
4. **Way to value** – Map how successful ideas move from the program into business units or investment vehicles.

Without a clear “way to value,” programs produce inspiring pitches but little business impact.

5.3. Applied Example (*caso hipotético*)

A manufacturing company launches a corporate accelerator to explore Industry 4.0 solutions. In its first year, it selects ten startups and runs a three-month program with mentoring and workshops. At the end, everyone celebrates—but none of the solutions are integrated.

When reviewing the design, leaders realize that:

- The **focus** was too broad: any digital solution could apply.
- **Logistics** emphasized training and events, not pilots.
- **Ownership** was unclear; business units saw the program as “something the innovation office does.”
- There was no defined **way to value**—no dedicated budget or process to scale up promising pilots.

In the second year, they redesign the program around clear problem statements, require business-unit sponsorship for each pilot, and define a post-program path. As a result, three solutions reach implementation.

5.4. Exercise – Redesigning or Creating a Corporate Innovation Program

Objective

Design or refine one corporate innovation program so that it clearly connects to strategy and value creation.

Roles

- Innovation office lead (facilitator).
- Business unit sponsors.
- HR / talent development representative.
- Finance and procurement representatives.

Inputs

- Current or planned innovation program description.
- Strategic priorities and pain points.
- Lessons learned from previous editions, if any.

Time

- 1–2 days.

Step-by-Step

1. Clarify the **Focus**: which problem areas does the program address? Who can apply?
2. Define **Logistics**: duration, stages (scouting, selection, pilot, scale), support offerings, evaluation criteria.
3. Specify **Ownership**: who is accountable for outcomes? How do governance and decision-making work?
4. Map the **Way to value**:
 - o What happens after a pilot?
 - o Which budgets and teams are responsible for scaling?
 - o How are risks managed?
5. Identify the communication strategy to attract strong participants and internal sponsors.
6. Document changes and obtain executive or board approval if needed.

Deliverables

- Updated program blueprint.
- Implementation roadmap for the next edition.

5.5. Template – Program Blueprint Summary

Element (example)	Description
Focus	Industry 4.0 solutions to improve plant efficiency and safety
Logistics	16-week program: scouting, selection of 8 startups, 3 pilots per plant, demo day with decision gate
Ownership	Innovation office (coordination), operations VP (sponsor), plant managers (pilot owners)
Way to value	Dedicated budget for scaling 2–3 pilots per cohort, integration support from IT and procurement

5.6. Checklist – Robust Corporate Innovation Programs

- ☐ The program focus is clearly tied to strategic priorities or pain points.
- ☐ Business units are involved as sponsors and owners, not only as observers.
- ☐ Selection criteria balance novelty with feasibility and strategic fit.
- ☐ There is a defined path from pilot to scale, with budget and resources.
- ☐ The program captures and shares learning, not just success stories.
- ☐ Program metrics are reviewed at executive or board level.

5.7. Suggested KPIs – Program Performance

- Number of initiatives sourced and selected per cohort.
 - Percentage of program participants that reach pilot stage.
 - Percentage of pilots that evolve into scaled implementations or investments.
 - Time from program completion to first scaled deployment.
 - Net business impact of solutions originating in the program over time.
-

6. Subtopic 3 – Hackathons and Innovation Challenges

6.1. Definition

Hackathons and innovation challenges are **time-bound events** where internal and external participants collaborate to generate ideas and prototypes around specific problems. They are powerful tools to:

- Explore new perspectives quickly.
- Engage employees, students and startups.
- Build visibility for your innovation agenda.

However, without careful design, they risk becoming isolated “innovation theater”.

6.2. Practical Framework – The C.H.A.L.L.E.N.G.E. Design

Use the **C.H.A.L.L.E.N.G.E. Design**:

1. **Context** – Define the strategic context and problem statements.
2. **Hands-on scope** – Clarify what participants can realistically build in the available time.
3. **Audience** – Decide who can participate (employees, startups, students, mixed teams).
4. **Logistics** – Set timelines, tools, support, mentors and evaluation criteria.
5. **Learning** – Design mechanisms to capture insights beyond the winning ideas.
6. **Execution** – Run the event with strong facilitation and communication.
7. **Next steps** – Provide clear pathways for promising ideas.
8. **Governance** – Ensure compliance with data, security and IP requirements.
9. **Engagement metrics** – Measure participation, diversity and satisfaction.

6.3. Applied Example (*caso hipotético*)

A retail company organizes a public hackathon on “reinventing the shopping experience.” Hundreds of participants join and generate creative concepts. After the event, no one is sure what to do with the ideas. Months later, most prototypes are forgotten and employees feel that the hackathon was a marketing stunt.

In a subsequent edition, the company redesigns the event:

- It narrows the **context** to “improving last-mile delivery experience.”
- The **scope** focuses on customer communication and tracking, which can be prototyped quickly.
- Mixed teams of employees and startups form the **audience**.
- Logistics ensure access to test data and APIs.
- Judges evaluate not only creativity but also feasibility and alignment.

- **Next steps** are clearly communicated: top three teams receive funding and a 12-week incubation.
- Governance ensures that any use of data respects privacy and security policies.

This time, two solutions evolve into live pilots with measurable impact.

6.4. Exercise – Designing a High-Impact Challenge

Objective

Design a hackathon or innovation challenge that generates implementable options for a specific strategic problem.

Roles

- Innovation leader (facilitator).
- Business unit owner of the problem area.
- IT / data representative.
- Legal and compliance advisor.
- Communications representative.

Inputs

- Strategic problem statement(s).
- Available APIs, datasets or sandbox environments.
- Budget and timeframe.

Time

- Design: 1–2 weeks.
- Event: 1–3 days.
- Follow-up incubation: 8–12 weeks.

Step-by-Step

1. Define the main challenge question and success criteria.
2. Select target participants and potential partners (universities, communities, startup hubs).
3. Decide on event format (physical, virtual, hybrid) and duration.
4. Prepare technical and business resources: data, mentors, documentation.
5. Develop evaluation rubric and judging panel.
6. Design post-event pathways (incubation, procurement fast-track, partnership options).
7. Run the event, collect feedback, and refine for future editions.

Deliverables

- Challenge design document.
- Timeline and responsibilities for execution and follow-up.

6.5. Template – Challenge Overview

Element (example)	Description
Challenge theme	Reinventing last-mile delivery experience
Target participants	Mixed teams: employees, startups, university students
Duration	48-hour hackathon + 12-week incubation for top teams
Evaluation criteria	Customer impact (40%), feasibility (30%), innovation (20%), presentation quality (10%)
Next steps for winners	Seed funding, pilot in two cities, mentorship from logistics and customer experience leaders

6.6. Checklist – From Event to Impact

- ☐ Problem statements are specific and linked to strategic priorities.
- ☐ Participants have access to the data, tools and support needed to build prototypes.
- ☐ Evaluation criteria and judges are aligned with implementation realities.
- ☐ Clear post-event pathways exist for the best ideas.
- ☐ Governance covers IP, data privacy and security.
- ☐ Learning from all participants is captured and shared.

6.7. Suggested KPIs – Challenge Outcomes

- Number and diversity of participants (internal vs external, disciplines, gender, geography).
 - Number of ideas reaching prototype stage.
 - Number of prototypes advancing into pilots or programs.
 - Time from event completion to first pilot launch.
 - Participant satisfaction and likelihood to join future events.
-

7. Subtopic 4 – Investment in Entrepreneurial Capital Funds

7.1. Definition

Investment in entrepreneurial capital funds—such as corporate venture capital (CVC) funds or partnerships with independent funds—is a way for organizations to **gain financial and strategic exposure** to emerging startups without always investing directly in individual companies.

The objective is twofold:

- Capture economic upside from promising ventures.
- Create **strategic options** by building relationships with innovators in relevant domains.

7.2. Practical Framework – The S.M.A.R.T. Investment Lens

Use the **S.M.A.R.T. Lens**:

1. **Strategic fit** – Does the fund's thesis align with your strategic themes?
2. **Model** – What is the investment structure (direct CVC, fund-of-funds, co-investment, strategic partnership)?
3. **Access** – What level of access will you have to portfolio companies (information rights, introductions, co-creation)?
4. **Risk & return** – What is the risk profile, time horizon and expected financial return?
5. **Translation** – How will insights and opportunities be translated into business action?

7.3. Applied Example (*caso hipotético*)

A global industrial company is considering investing in a venture capital fund focused on climate tech. Their motivation is not only financial; they also see the potential to access startups working on carbon capture, green logistics and energy efficiency.

Applying the S.M.A.R.T. Lens:

- The **strategic fit** is strong, as sustainability is a board-level priority.
- The **model** chosen is a limited partnership with one seat on the fund's advisory board.
- They negotiate **access** clauses that include periodic portfolio reviews and priority introductions.
- They analyze **risk & return** against their overall investment portfolio.

- They define **translation** mechanisms: an internal “venture scouting council” that meets quarterly to review portfolio companies and identify collaboration or acquisition options.

7.4. Exercise – Evaluating a Fund or CVC Opportunity

Objective

Assess whether a potential investment in a venture fund or CVC structure is appropriate and how it should be designed.

Roles

- CFO or corporate finance leader.
- Strategy and innovation leaders.
- Legal and compliance.
- Risk management.
- External advisors, if needed.

Inputs

- Fund prospectus or CVC proposal.
- Corporate investment policies.
- Strategic roadmap and risk appetite.

Time

- Several weeks, depending on due diligence depth.

Step-by-Step

1. Map the fund’s thesis and compare it with your strategic themes.
2. Analyze the track record and capabilities of the fund manager.
3. Use the S.M.A.R.T. Lens to evaluate fit, model, access, risk/return and translation.
4. Define desired governance rights and reporting requirements.
5. Estimate budget and opportunity cost.
6. Prepare a recommendation for the investment committee or board.
7. If approved, set up internal mechanisms to extract strategic value, not just financial returns.

Deliverables

- Investment evaluation document.
- Decision memo for the board or investment committee.

7.5. Template – Fund Evaluation Snapshot

Fund / opportunity (example)	Strategic domain focus	Investment model	Level of access to portfolio (Low/Medium/High)	Risk profile (1–5)	Recommendation (Invest / Monitor / Decline)	Key next step
GreenTech Ventures Fund II	Climate tech: carbon capture, energy, logistics	LP investment with advisory seat	High	4	Invest	Present to board in July

7.6. Checklist – Strategic Investment Discipline

- ☐ Each investment opportunity is explicitly tied to strategic domains.
- ☐ There is clarity about the investment model and governance.
- ☐ Expectations for financial and strategic returns are defined and realistic.
- ☐ Internal mechanisms exist to translate portfolio insights into action.
- ☐ Conflicts of interest and compliance issues are identified and managed.
- ☐ Performance of the investment is reviewed regularly at the appropriate level.

7.7. Suggested KPIs – Investment and Strategic Value

- Number of funds or CVC structures aligned with strategic themes.
- Total capital committed vs. approved investment envelope.
- Number of portfolio companies engaged in pilots, partnerships or commercial deals.
- Financial performance compared with benchmark indices over time.
- Internal perception of the strategic value generated (survey or interviews).

8. Subtopic 5 – Integrating External Ideas into the Core Business

8.1. Definition

The ultimate test of open innovation is not the number of pilots or partnerships, but **how many external ideas become part of your core products, services and processes**. Integration is often the most difficult step, because it touches:

- Legacy systems and processes.
- Governance, risk and compliance.
- Culture and incentives.

Integration requires deliberate **bridges** between experimentation and operations.

8.2. Practical Framework – The B.R.I.D.G.E. Integration Path

Use the **B.R.I.D.G.E. Path**:

1. **Business owner** – Assign a clear internal owner early in the process.
2. **Requirements** – Map technical, legal, operational and customer requirements.
3. **Integration design** – Decide how the external solution will connect to systems and workflows.
4. **Decision gates** – Define milestones and criteria for moving from pilot to scale.
5. **Governance** – Establish risk controls, SLAs and support models.
6. **Enablement** – Train teams, adapt processes and track adoption.

8.3. Applied Example (*caso hipotético*)

A telecom operator tests an AI-based customer support chatbot developed by a startup. The pilot shows promising results, but integration stalls because:

- No internal business owner is accountable.
- IT security concerns appear late.
- Frontline teams are not trained to work with the new tool.

Applying the B.R.I.D.G.E. Path, leaders redesign the approach:

- The head of customer operations becomes the **business owner**.
- Requirements from IT, security, legal and customer experience are captured early.
- Integration with existing CRM and ticketing systems is planned.
- Clear **decision gates** define what success means after each phase.
- Governance and SLAs are negotiated with the startup.
- Agents receive training and performance dashboards are updated.

As a result, the chatbot moves from pilot in one channel to deployment across all digital channels within a year.

8.4. Exercise – Integration Readiness Assessment

Objective

Assess how ready your organization is to integrate a specific external solution and define actions to close gaps.

Roles

- Business owner.
- IT / security.
- Legal and compliance.
- Operations and customer-facing teams.
- Vendor or startup representatives.

Inputs

- Description of the external solution and pilot results.
- Architecture diagrams and process maps.
- Risk and compliance requirements.

Time

- 1–2 workshops of 3 hours.

Step-by-Step

1. Describe the solution and desired business outcomes.
2. Use the **Integration Readiness Matrix** template to assess each dimension (requirements, technology, change management).
3. Identify gaps or risks and prioritize mitigation actions.
4. Define decision gates and timelines.
5. Agree on responsibilities and communication plan.

Deliverables

- Integration Readiness Matrix.
- Action plan to move from pilot to scale.

8.5. Template – Integration Readiness Matrix

Dimension (example)	Current status (Green/Amber/Red)	Key gaps or risks	Action required	Owner
Technical integration	Amber	CRM API limits, data format misalignment	Define integration architecture and required changes	IT integration lead

8.6. Checklist – Turning Ideas into Business Value

- ☐ Each external solution has a clear internal business owner.
- ☐ Integration requirements are mapped early, not after the pilot.
- ☐ There are defined decision gates from exploration to scale.
- ☐ Risk, compliance and security concerns are addressed proactively.
- ☐ Teams impacted by the solution are trained and supported.
- ☐ Post-integration performance is monitored and reviewed.

8.7. Suggested KPIs – Integration Success

- Number of external solutions integrated into core operations.
 - Percentage of pilots that reach scaled deployment.
 - Time from pilot completion to full integration.
 - Business impact of integrated solutions (for example NPS, revenue, cost savings).
 - Satisfaction of internal teams working with the integrated solutions.
-

9. Global Templates and Tools for Open Innovation

9.1. Impact × Effort Prioritization Rubric

Use this rubric to prioritize open innovation initiatives across subtopics.

Initiative (example)	Impact (1–5)	Effort (1–5)	Priority (High/Medium/Low)	Responsible	Next milestone	Date
Launch joint program with leading AI startup hub	5	3	High	Chief Innovation Officer	Sign MoU and define first cohort	30/09

9.2. RACI Matrix – Governance of Open Innovation

Clarify roles for key activities.

Activity (example)	R (Responsible)	A (Accountable)	C (Consulted)	I (Informed)	Deliverable	Date
Approve annual open innovation portfolio	Innovation steering team	CEO	CFO, business unit leaders, legal, risk	Board of directors	Approved portfolio and budget	31/01

9.3. KPI Dashboard – Health of Open Innovation

Build a simple dashboard that can be updated quarterly.

KPI (example)	Definition	Target	Baseline	Frequency	Owner	Data source
Open Innovation Portfolio Conversion Rate	Percentage of pilots that move to scaled deployment/investment	≥ 25%	10%	Quarterly	Innovation office	Program and portfolio reports
Portfolio Strategic Alignment Index	Share of initiatives mapped to top 5 strategic themes	≥ 90%	60%	Quarterly	Strategy office	Portfolio registry

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9.4. Human–Cultural Risk Map

Innovation is also cultural. Map key risks.

Risk (example)	Probability (A/M/B)	Impact (A/M/B)	Mitigation strategy	Owner	Status
Perception that open innovation competes with internal teams	Medium	High	Communicate benefits, involve internal experts as mentors	HR + innovation	In progress

9.5. 30–60–90 Day Plan – Rolling Agenda for Open Innovation

Horizon	Objective (example)	Actions	Responsible	Indicators	Deliverable
30 days	Map existing collaborations and programs	Inventory current pilots, partnerships and funds; categorize by theme and maturity	Innovation office	Portfolio map completed	Open innovation baseline report
60 days	Prioritize top opportunities and gaps	Run partner mapping workshop; redesign corporate program focus	Innovation + strategy	Priority list agreed	Updated open innovation roadmap
90 days	Launch or relaunch two high-impact initiatives	Kick off challenge event and new university partnership	Innovation office	Initiatives launched and sponsored	Launch report and communication package

10. Summary and Next Steps

10.1. Key Messages

Open innovation is no longer optional. It is one of the most powerful ways for leaders to navigate uncertainty, leverage external talent and accelerate transformation.

In this guide you have explored how to:

- Build **purposeful collaborations** with startups and universities.
- Design **corporate innovation programs** that connect with strategy and value.
- Use **hackathons and challenges** as serious tools, not just events.
- Leverage **investment vehicles** to access emerging ventures with discipline.
- **Integrate** external ideas into your core business through robust bridges.

What you do next will define whether open innovation becomes a **strategic engine** or a short-lived trend in your organization.

10.2. Next Steps Checklist

Use the following table to move into action:

Next step (example)	Responsible	Deadline	Status	Observations
Create cross-functional open innovation steering committee	CEO	15/07	Planned	Include representatives from strategy and finance
Map and prioritize existing startup and university collaborations	Innovation office	30/07	Planned	Use Partner Opportunity Map template
Redesign corporate accelerator with clear “way to value”	Innovation program lead	30/09	Planned	Align with two priority business units
Define governance for venture fund investments	CFO + strategy lead	31/10	Planned	Apply S.M.A.R.T. Investment Lens
Establish B.R.I.D.G.E. integration path for top three pilots	Business owners	30/11	Planned	Include IT, risk, and operations from the start

11. Self-Assessment – Open Innovation Maturity

Rate each statement from **1 to 5**:

1 = Strongly disagree, 2 = Disagree, 3 = Neutral, 4 = Agree, 5 = Strongly agree.

1. We have a clear strategic intent for open innovation, documented and shared.
2. Collaboration with startups and universities is driven by specific strategic themes.
3. Each external collaboration has a named internal sponsor and business owner.
4. Our corporate innovation programs have a well-defined path from idea to value.
5. Business units actively participate as sponsors and owners of program pilots.
6. Hackathons and innovation challenges are linked to concrete problem statements.
7. Promising ideas from events receive structured follow-up and incubation.
8. We have defined criteria and processes for investing in venture funds or startups.
9. Investments in entrepreneurial capital are reviewed regularly for strategic and financial value.
10. There are clear processes and responsible roles for integrating external solutions into core operations.
11. Risk, compliance and security are considered early in open innovation initiatives.
12. We track a set of KPIs that reflect the health and impact of open innovation.
13. Lessons from successes and failures are documented and shared across the organization.
14. Employees perceive open innovation as an opportunity, not as a threat.
15. Overall, our open innovation agenda feels coherent, prioritized and sustainable.

11.1. Scoring Method

1. Add your scores for all 15 statements (minimum 15, maximum 75).
2. Divide the total by 15 to obtain your **average maturity score** (1.0 to 5.0).

11.2. Interpretation and Recommendations

- **1.0 – 2.5: Early Stage**
 - Open innovation activities are sporadic and disconnected.
 - Focus on clarifying strategic intent, mapping existing initiatives and appointing owners.
- **2.6 – 3.8: Emerging Discipline**
 - Some structures exist, but they are uneven across the organization.
 - Prioritize building consistent governance, KPIs and integration pathways.
- **3.9 – 5.0: Advanced Practice**
 - Open innovation is integrated into strategy and operations.
 - Continue refining portfolio management, capability development and ecosystem leadership.

12. Glossary – 15 Key Terms

1. **Open Innovation**
Collaborative approach where organizations leverage external ideas, technologies and partners to create value.
2. **Startup Collaboration**
Structured engagement with early-stage companies to co-develop solutions, run pilots or access new capabilities.
3. **Academic Partnership**
Long-term relationship with universities or research centers for research, talent development and technology transfer.
4. **Corporate Innovation Program**
Accelerator, incubator, venture builder or similar initiative run by a corporation to source and develop innovation.
5. **Hackathon**
Time-bound event where multidisciplinary teams work intensively to build prototypes or concepts around a challenge.
6. **Innovation Challenge**
Competition where participants propose solutions to specific problems, often with prizes or pilot opportunities.
7. **Corporate Venture Capital (CVC)**
Investment activity by a corporation in external startups, typically aligned with strategic domains.
8. **Entrepreneurial Capital Fund**
Investment fund that provides capital to startups; may be independent or have corporate partners.
9. **Strategic Fit**
Degree to which an initiative or investment aligns with the organization's long-term objectives and capabilities.
10. **Pilot**
Limited-scale test of a solution in a controlled environment to validate assumptions before broader deployment.
11. **Scale-Up**
Process of expanding a solution from pilot to broad implementation across markets, units or segments.
12. **Integration Path**
Sequence of steps, decision gates and technical activities to embed an external solution into core operations.
13. **Ecosystem**
Network of organizations, individuals and institutions interconnected around shared interests and value creation.
14. **Innovation Portfolio**
Collection of innovation initiatives and investments managed together for balance of risk, impact and time horizons.

15. **Innovation Theater**

Superficial innovation activities focused on image rather than substantive impact or learning.

Final Note of Gratitude

Thank you for dedicating time and focus to this material. Each concept and tool here was designed to provide clarity and strategic vision.

The fact that you are here—investing in yourself and your organization—is proof of leadership commitment.

Remember: true impact comes not only from learning but from **applying and sharing** it. May this guide support wiser decisions, deeper conversations, and more meaningful transformations.

Reference to the HBT PORTAL™

The place where each week you will find:

-  Practical ebooks.
-  Podcast summaries on Spotify.
-  Videos on YouTube.

All designed to connect innovation with the human.

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