



The Professional Development Institute PDI Inc.

Leadership, Strategy, Innovation, Risk, Negotiation & Project Management
Architects of Harvard University Global System™

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2017 World Seminar

Mastering Principled Team Innovation and Creativity

Skills, Techniques and Harvard® Toolkit to Increase Innovation
Quality, Capacity, Velocity, Usability and Sustainability

Palo Alto (CA)
July 19-21, 2017

Ottawa (Canada)
September 18, 2017

Boston (MA)
October 23-25, 2017

I. Who Should Attend?

Boosting innovation quality, capacity, agility and durability is everyone's business in the workplace, not solely executive's domain. Thus, you are welcome to participate whether you are an executive, a team leader, a facilitator, a scientist, an engineer, an economist, an entrepreneur, an inventor or an expert in policy, design, intellectual property, finance, health, IT or intelligence.

The learning applies to the private and public sectors in technological and other fields, including strategy, policy development, negotiation, risk mitigation, advertising, branding, client services, socioeconomic innovation and product development (biotech, food safety, defense, energy, Fintech, crowdsourced innovation, transportation, logistics, advanced manufacturing, nanoscience, nanosats, progressive Web apps and the Internet of Things).

Although innovation must transcend the entire value chain, most great innovations emerged from small teams. We suggest you register at least two teammates. Examples of innovation-based firms created by dyads include Apple, Aqylon, Argo AI, Biokplus, Blackstone, Cisco, Google, HP, Impinj, Instagram, Intel, Microsoft, Snap, Stripe, Yahoo, WeWork and Wikipedia.

II. Learning Objectives

Both an art and increasingly a science, innovation is developing into a rich knowledge base and competencies, some of which are universal; i.e., applicable across professional lines. For nations, it is an essential underpinning to progress in advanced standards of living, social justice, defense and sustainable development. For organizations, innovation is a springboard to agility and solid growth. Yet, most team leaders and professionals find it difficult to innovate in collaborative and effective ways. Much worse, some overlook that innovation is a learned skill. Alas, only a few organizations provide their staff with the cutting-edge competencies in team innovation and synergy.

This workshop permits those competent professionals to gain the knowledge, skills and some best practices to master the complete collaborative and iterative innovation cycle. This cycle spans from incubating, boosting and capturing imagination to abductive reasoning and framing a portfolio of competing core ideas; then to conceptualization, simulation and prototyping; including iterations of these tasks, before production of beneficial deliverables that clients/users would value and safely adopt. Note that the deliverables can also be messages, reports or ads destined to influence the target audience.

Through a multidimensional proprietary **Innovation-Balance Compass™**, the participants will learn the wisdom of flexible corridors of navigation that increase the cross-fertilization of insights and eschew a spectrum of innovation threats. The focus will be on:

- a. Increasing the choices at every step of the value chain with less guesswork (blind alleys);
- b. Obtaining the knowledge and the skills to excel in the practice of collaborative and practical brainstorming;

"Creativity is contagious. Pass it on!"

Albert Einstein



"It is not the strongest of the species that survives, nor the most intelligent, but the one that is most responsive to change."

Charles Darwin

- c. Learning the hard lessons from the successes and failures that led to best practices at small and large firms, as well as at NASA, Los Alamos National Labs and mission-critical government agencies;
- d. Championing a resilient innovation culture in and beyond their teams, always keeping in mind two dictums: Andy Grove's: "Success breeds complacency. complacency breeds failure." and Alain Martin's: "Harnessing the lessons of failures, both ours and others', whether from negligence or risk-taking, yields opportunities."

The program comprises two learning blocks:

1. Learn the **competencies** and **practical instruments** that guarantee enhanced team creativity beyond what is achievable with current practices in technological and non-technological forms of innovation. With these skills and **Harvard University Global System's™ framework and tools**, you can spark novel options by seeding, incubating and exploring a complete panorama of choices in crafting goals, deliverables and strategies, mobilizing and allocating resources, prototyping, securing buy-ins, mitigating risks, executing, delivering excellence and wisely evaluating impact.
2. Learn the step-by-step techniques and behaviors to **brainstorm in teams in ways to increase synergy**; i.e., work together in the most creative and productive ways. You will explore innovative scenarios to excel in team innovation and intellectual-property development; i.e., increase your organization's speed and capacity to seamlessly create superior, durable and effective physical and digital products or services, processes, policies, rules, decision mechanisms, strategic alliances, online platforms and intelligence.

These competencies and tools are vital to compete globally, build and retain clients and high-performing teams, both in the public and private sectors. Bring your own innovation issues or case study for consideration during teamwork (one case per group of 4 participants).

At the end of the workshop, you will be able to help your team capture hidden asymmetric opportunities and produce bold "out-of-the-box" practical innovations with less guesswork.

III Workshop Outline (3 Days - 2.5 CEU)

1. The Dynamics of Synergistic Collaborative Innovation and Creativity

- Teams Asterix and Tintin: What can we learn from their enduring legacy of boundless imagination crafted within a relevant context and timing?
- Innovation is more than R&D: From Katja Hölttä-Otto, Ben Martin and Michael Porter to precise regulatory definitions (U.S., EU and Canada)
- Principled open innovation: Contextual benefits, risks and unknowns (European Innovation Scoreboard)
- **The Innovation-Balance Compass™ (Part I): Challenging the Rules of the Game**
 - Questioning assumptions, boundaries and practices, reinventing the rules, reframing to innovate
 - How and where to factor innovation quality, capacity, velocity, usability and sustainability into the design equation?
- Crafting a team-innovation policy (corridors of navigation, open-ended discovery and learning)
- Team-synergy exercise stretching the participants' comfort zone

2. The innovator's Checklist: Every team must acquire one, prune and frequently build on it

- Formulating fundamental questions about
 - Current and emerging threats and opportunities
 - The present and the future; linear and unorthodox pathways to get there
- Visioning the journey between imagination, vision and success: Harvard® HUGS complete roadmap
- Innovation activities as iterative non-linear zoom-in and out cycles, including a selection from the following:
 - Visualizing: Dialoguing, mapping, framing the issues and stakeholders' dynamics
 - Incubating: Daring to be bold on imagination, conceptualizing and looking-out (harnessing the power of open and other intelligence)
 - Strategizing: Modeling options, rethinking, reframing and buy-in strategy
 - Experimenting and reflecting: Playing, improvising and divergent/convergent thinking
 - Critical-mass formation tasks
 - Seeking help: Strengthening, building-on, challenging and catalyzing

- Prototyping: Requirements definition, scope, tools and charter of prototyping, mock-up, build, test (break, stress-out), demonstrate and distill intelligence
- Developing: Scaling, product and process engineering and logistics, building and system testing
- Beta: Sharing, upgrading, aligning and refining
- Celebrating: Allies, milestones, progress and failures
- Marketing and selling
- Delivering: Using, influencing, streamlining, servicing and exiting gracefully

3. Innovative Thinking and Strategic Positioning Across the Value Chain: Methods, Techniques and Harvard® Tools to Seek and Exploit the Best Opportunities

- Theory U's innovation eco-system: Six inflection points (Otto Scharmer, MIT)
- Instrument to define innovation scope, value chain, externalities, iteration and evaluation mechanisms
 - From deliverables to outcomes and impact
 - Making superior digital and physical products and services
- Brainstorming: Widely-used brainstorming techniques and practices
- Harvard® Creativity Template and framework to boost innovation capacity and velocity: Thinking outside the box with a free flow of ideas, real and fuzzy options, fun and less guesswork
 - Step-by-step protocol for effective brainstorming: Harnessing experience, open-source intelligence and HUGS intellectual property to create, build, improve upon everyone's suggestions and have fun
 - How the integration of the physician's options (laissez-faire, symptomatic, etiologic and mixed or integral interventions) and Sun-Tzu timeless wisdom opened new vistas for potential innovations, in small and large firms and governments, ranging from the status quo to supreme excellence
 - Open-source intelligence exercise: How to promptly build complex queries to locate nuggets in a haystack?
 - Rules for healthy and provocative auto-critique and collective critique
 - How to sketch the forest to build a value proposition from a cluster of choices: Illustrations from basics to a complete transformation in corporate finance, a complex multinational venture in aerospace and historic lessons from Dr. Joseph Lister, Louis Pasteur and Procter & Gamble's Ivory Soap.
 - 20 benchmarking questions on quality, usability and sustainability to test the validity of your harvest?
 - Core of usability and sustainability sciences (reading reference)
- The bottom line: Exercise to stimulate creative thinking, build upon each other's ideas and co-create

4. Hard Lessons for Collaborative Teams from Exemplary Innovations, Failures and Brilliant Blunders

- Mission-critical life and death cases: NASA, nuclear energy, defense
- Amazon, Netflix and Malcolm Gladwell's truth about innovation
- How to address serious threats stifling innovation: normalization of deviance, groupthink, perfection syndromes, "the valley of death" and the risks and opportunities facing champions, underdogs and riders?
 - Practical lessons from Netscape, Lotus, Bing, WordPerfect and the space-shuttle Challenger disaster
- Why balancing enterprise and user risk/rewards should be viewed over multiple iterations?
 - NASA lessons from Seasat A to the Hubble Telescope
- Harnessing orphan-innovations' opportunities

5. Leadership Issues: Collaborative Environment, Team Structures, Funding and Progress Benchmarks

- How to build the best environment for intensive co-creation: 7 leadership capacities (Otto Scharmer, MIT)
- How to address the team's Achilles' heels (blind alleys, scaling, resistance, branding) and execute flawlessly
- **The Innovation-Balance Compass™ (Part II): Upstream Balance**
 - Importance of maintaining portfolio equilibrium between risk initiatives (both manageable and unknown) and bread-and-butter generators
- How to cautiously assess progress and success in creativity
 - Seven critical success factors: (QQTLEC benchmarks for innovation projects)
 - How and where innovation matters in the hearts and minds of consumers and policy makers?
 - Collaborative-innovation evaluation: Dealing with the value-laden issues of objectivity, impartiality, vulnerability, multiple contexts and chance
 - Framing success in projects versus organizations and countries

- Flexible and agile team structures
- Video: Astronaut Mike Mullane on accountable self-leaders
- Strategic and operational policies issues
 - Invisible innovation: Working beneath the radar
 - Funding innovation through tax credits: Qualified research under the U.S. R&E, Canada's SR&ED and EU regulations (coverage vary based on attendees' home country)
 - Public-Private Partnerships (PPP) and crowdfunding
 - NATO cost sharing (for defense participants)

6. Roleplaying Case from Your Own Organization

- Collaborative-team composition: Options for each team
 - Business, government, coops and public-private partnerships (PPP)
 - In-house, outsourced, syndicated or crowdsourced innovation (know-how trading)
- Iterative innovation rounds: Brainstorming and validating creative options
- Intergroup learning and feedback

7. Synthesis and Conclusion

- How to wisely champion principled intensive innovation within and beyond your teams
- 90-day action plan to practice the skills and keep progressing

IV. The World-Seminar Leader: Inventor, Scholar and R&D Leader

Alain Paul Martin works with innovation teams in the policy realm, health, biotech, advanced-software development, energy and mining. In this World Seminar, he will share the best practices and the hard lessons he learned from leading engineers and scientists, teaching Harvard case studies and experiencing successes and failures including a colossal blunder. As the author of “Harnessing the Power of Intelligence, Counterintelligence & Surprise Events”, Alain will also share unique insights about securing and validating open-source and other intelligence, as well as protecting your intellectual property.

As an 18-year co-op student at Peugeot in France, he delivered his first engineering innovation, a jig to eliminate his own mass-production job through intelligent automation. Upon starting his career in the aerospace industry in North America, Alain earned corporate awards in technological innovations. He went on to lead mathematical-simulation and IT teams to optimize transportation at Du Pont and construction materials at Domtar. He also led the development of an operational-research system to assess news-delivery quality and impartiality at the CBC.

He subsequently established a track record in digital and physical product innovations as an inventor (U.S., Canadian and Japanese patents) and a strategic-change agent in insurance and banking with Desjardins and the National Bank, the UNESCO and several governments where he incubated the Canadian Food Inspection Agency with Dr. Brian Morrissey and trained policy professionals.

As an entrepreneur, Alain created employment for knowledge workers for over 20 years and led his teams to receive a Canada Awards for Excellence certificate and the Mercure Gold Award for a client. He led the creation of Harvard University Global System™ (HUGS) as well as the Global Method and the novel software algorithms used by Skanska in managing projects varying from millions to multi-billion dollars.

Alain held graduate faculty posts in leadership and management of change. He is a Harvard-University Fellow in Advanced Leadership (2012) and an alumnus in entrepreneurship (OPM) of Harvard Business School (1997-99). He is certified to teach negotiation in the corporation by Harvard Law School where he took formal training negotiation, mediation and alternative-dispute resolution (ADR).

V. Course Materials of Lasting Value

A total attention to quality is featured in the versatile course materials from the success stories, the pre-readings, the practical exercises and case studies to the practical toolkit and attractive and durable Harvard® road maps.

VI. Tuition Fees (Public Workshops)

- 3 days: Regular fees: \$1695; Government: \$1495; Group fees for 3 or more participants: \$1450 per person.

- Fees include books, hand-outs, road maps and other course materials of exceptional value, plus a daily continental breakfast, hot and soft drinks during the pauses, but exclude hotel accommodation (if required).

VII. Registration and Cancellation Procedures

Please register, online at www.eharvard.org or call us toll free: 1-800-HARVARD (USA and Canada) or at +1 819-772-7777, Monday through Thursday (9AM - 4:30PM EDT). Please pay in advance by credit card.

Cancellation Policy: Participants registering as a group must send substitutes in lieu of cancelling. For other clients, cancellations are accepted if made at least 10 working days prior to the course, and are subject to a \$150 service charge per person. Full fees are payable by anyone who fails to attend or cancels less than 10 working days prior to the session. One substitution or transfer to a later course of the same duration is accepted.

VIII. Workshop Locations and Hotel Accommodation

Click for detailed information about hotels: www.eharvard.org/hotel

IX. Bring This Workshop to Your Organization

We deliver in-house versions of this workshop to business and governments and NGOs. We would be delighted to work with you. Ask us for a proposal based on the number of participants, the seminar duration and a selection of cutting-edge course materials and case studies applicable to your environment.

Our fees are most reasonable. If required to support your request, we would provide supporting evidence for service fees recently billed to governments and companies.

The travel expenses for seminar leaders are on cost-recovery basis. They include airfare, ground transportation, meals, gratuities, airport taxes and hotel accommodation. There is no travel expense for seminars held in the cities of New York, Boston, Cambridge and Ottawa where we hold regular public workshops. If applicable in your jurisdiction, sales and value-added taxes (HST and PST or VAT) are extra.

The client is responsible for the conference room, audio-visual including 2 flip charts, an 8x8 feet screen, internet access, a digital projector for PowerPoint presentations and a laptop computer (as a back-up machine). We also recommend round tables, each seating five participants, in a crescent arrangement, to face the workshop leader.

X. How to Make a Difference on Your Résumé

This workshop provides universal skills that are in high demand as pre-requisites for excellence in every leadership and professional position. When these skills are acquired at a reputable institution like ours, they will stand out on your CV, as a notable accomplishment.

For us, that is necessary but not sufficient, as we want you also to excel in the workplace so we can succeed with you. To this end, you will be armed with cutting-edge knowledge, practical skills, sound techniques and Harvard University Global System™, the finest framework and toolkit for high achievers. And with our outstanding faculty of distinguished workshop leaders who combine graduate-level teaching in leading universities with ongoing international field practice, we aim to help you gain and maintain no less than the competitive edge.

To prevent misrepresentation and maintain the trust in the marketplace, we also count on our participants who are certified to have successfully completed this workshop to be rigorous in including it in their résumé exactly as indicated below, either in multiple lines or in a single contiguous string.

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Optional: Skills, Techniques and Harvard® Toolkit to Increase Innovation
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The Professional Development Institute
City and date, e.g. Boston, October 23-25, 2017

For more information, please contact us by e-mail at rsvp@executive.org; call us toll free: 1-800-HARVARD (USA, Canada), +1 819-772-7777, Monday through Thursday (9AM - 4:30PM EDT).

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