



Workshop Leader Guide

*How to run your innovation workshop,
inspire your team and create innovative changes
to your business.*

Brought to you by:



Introduction

Innovation
be big or
disruptive
enhance

can
small;
or simply
today

Congratulations on becoming
a Workshop Leader for the
Netwealth Innovation Toolkit!

This guide will prepare you
to lead exercises and uncover
great innovations.

Let's get started! →

Introduction

A short welcome note
to the Innovation Toolkit.
Pages 2 & 3.

Your role

Some tips to help shape your role
in the workshop on pages 6 & 7.

Setting up

Find a check-list and some
set-up advice on planning for
a great session. Pages 8 & 9.

The workshop

Pages 10 & 11 cover questions and thought-starters to engage the group and encourage creative thinking.

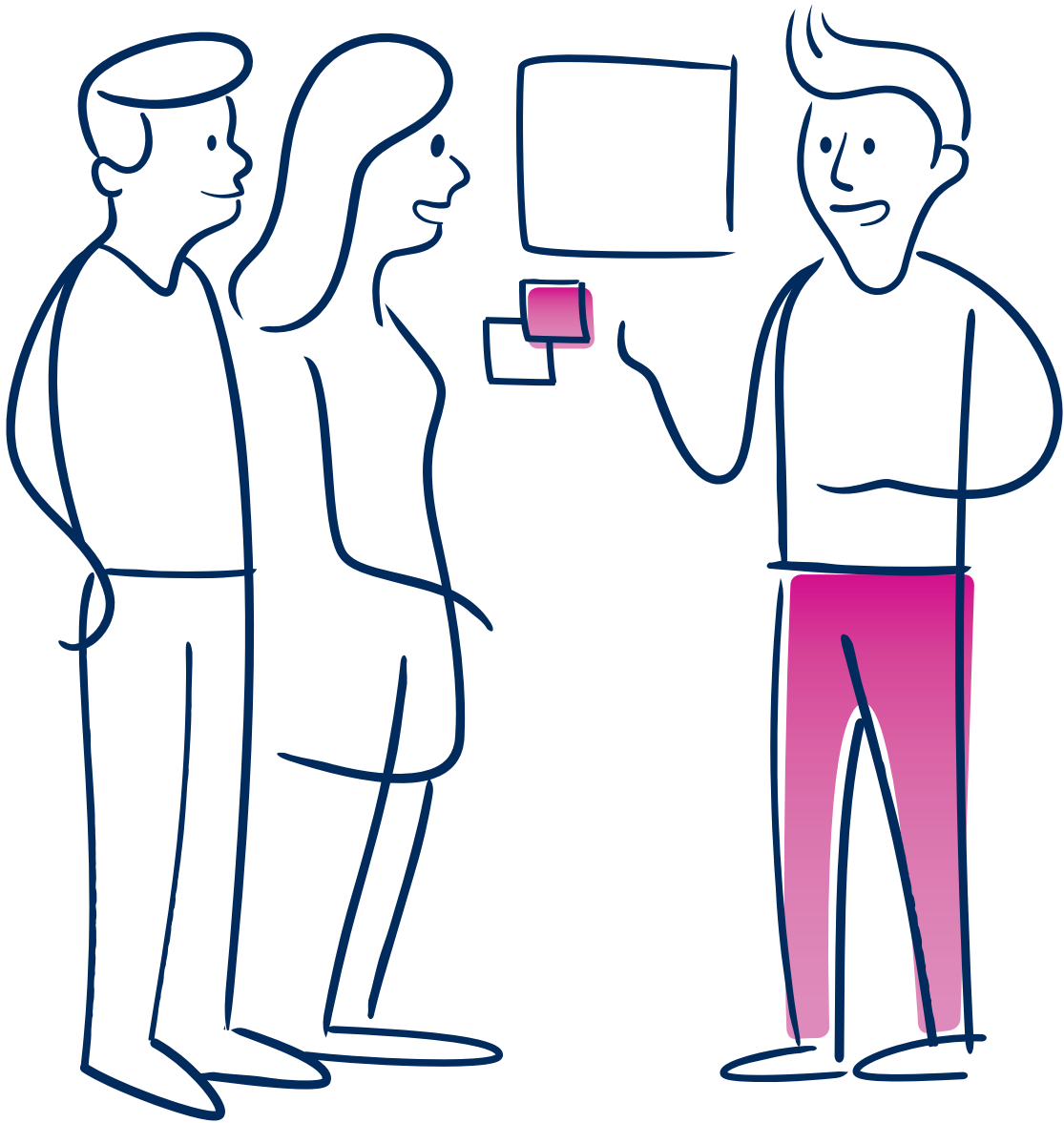
Learnings

So... How did that go? What worked? Some space on pages 12 & 13 to add your thoughts after a session.

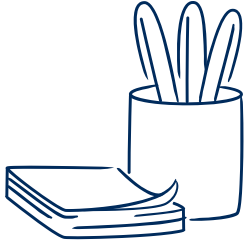
Notes

A place for thoughts, ideas and sketches on pages 14 & 15.

Your role*

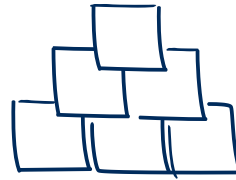


*Just remember as long as the group is productive, you are doing your job.



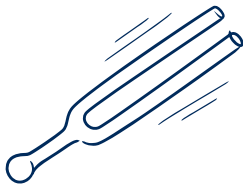
Prepare the workshop

As workshop leader it is your responsibility to invite all participants, to set up the room, provide all necessary materials, food and manage other logistics.



Provide structure

Your goal is to balance the session for maximum productivity with informality and fun. To keep things flowing and enjoyable you will need to manage time, prompt discussion, elicit ideas and concerns, prioritise and problem-solve.



Set the tone

Setting and maintaining the tone, energy and productivity of the group is key. Be positive, confident and embrace the workshops. To keep these factors high we encourage a short break at least every two hours to give the brains a rest and reset.



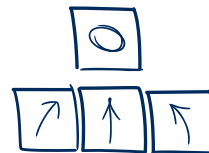
Get involved

Your ideas are important too so if you see any opportunities to contribute to the discussion and generate new ideas make sure you do so. And as you are part of the business you should be voting on the innovations you think are most important.



Provide focus

Ensure that the group understands the activities and objectives, and that they are visible in the room for all to see. The workshop presentation should help with this.



Recap sessions

It is important at the end of each activity to recap what was discussed and the main outcomes, to give the group a sense of achievement and understanding. This is especially relevant at the completion of the workshop. Ensure the group leaves with some tangible evidence of what it has accomplished – a decision made, plans developed, a list of ideas, priorities set, etc.

Setting up

What you will need

Got it!

1.	Blu-Tack	<input type="radio"/>
2.	Sharpie markers – The thick black ones	<input type="radio"/>
3.	Pens – multi-coloured pack	<input type="radio"/>
4.	Chocolate, lollies or fruit – keep the energy up!	<input type="radio"/>
5.	Camera – don't forget to take photos!	<input type="radio"/>
6.	Coffee and water	<input type="radio"/>

What you will need to print

Done!

7.	AdviceTech Roadmap Worksheets – print in A3 and at least 2 sets	<input type="radio"/>
8.	AdviceTech Roadmap Prioritisation Matrix – print in A3 and at least 2 sets	<input type="radio"/>
9.	AdviceTech Research Report	<input type="radio"/>

What you will need in the room

Ready!

10.	Computer and projector for the AdviceTech Workshop Presentation (PowerPoint)	<input type="radio"/>
11.	Plenty of wall space – you will be sticking things all over the wall	<input type="radio"/>

For a great session...

What about that
corner cafe with
the side room?

Finding a venue

Atmosphere is everything. You are asking your team to break from the norm and create change, so making them feel like they have the freedom and permission to do so.

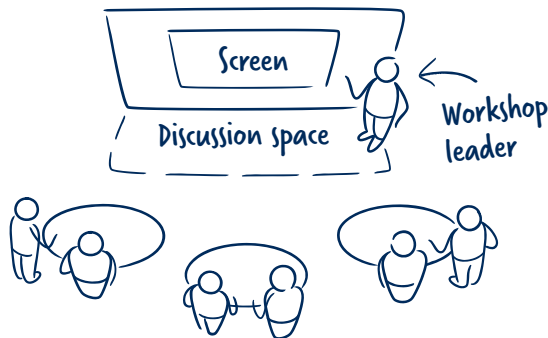
Book a meeting room in a co-working space or somewhere totally different. The brighter, more relaxed and colourful a venue is the better.

Try to avoid having one large boardroom that everyone sits in. Instead think small tables and chairs so group discussions can foster.

The aim is to create a mental distance from "business as usual" to help people relax and think openly.

Another way to support this is to encourage the wearing of casual.

A good venue set up:



P-l-a-n!

Capture the gold

One of the most common mistakes in a workshop is to get caught up in the discussion, and forget to capture people's thoughts along the way.

With so many different ideas floating around, it's important to capture them all on a Post-it, to make sure you don't miss out on any gold.

Theme and cluster

A suggested method to manage the information generated in the workshop is to cluster similar Post-it ideas into themes.

This helps you filter the information obtained and, more importantly, spot the big trends.

When you cluster an area, circle and name it. Doing so gives you and the team an understanding of what is connecting all these Post-its.

However, don't immediately dismiss individual Post-its or small clusters because these may be where truly fresh thinking lies. It might also be an idea that needs a bit more massaging to make it great.

There's gold
in these ideas!

The car park

There are going to be times during the workshop where people will discuss ideas that are off topic. These should be handled in a way that avoids disheartening participants.

Rather than dismissing them, instead capture the idea on a Post-it and put it on the "car park" – an area to the side of the main discussion.

This shows you're interested in what they are saying, but it's just not in scope for today's conversation.

This should enable the person to move on and refocus positively.

The workshop

Ask these questions if the group looks stuck or you want to keep the ideas flowing.

Use the 'Refining Ideas' questions to help articulate what problem an idea solves and how it can be done.

Encouraging thinking

What else is this like?

What other ideas does this suggest?

Does the past offer a parallel?

What can you/we copy?

Whom can we emulate?

What other processes could be adapted?

What else could be adapted?

What different contexts can I put the idea in to spark a fresh perspective?

What brands can we learn from?
E.g. Nike, Lego, Google, AirBnB, Amazon

What other categories can we learn from? Think Streaming Services, Consultants, Travel

If a celebrity did this what would they do differently?
E.g. Obama, Oprah, Trump, Musk

Refining ideas

What's useful about the idea?

What's interesting about the idea?

What's missing in the idea?

How can the idea be implemented?

Who else could deliver the idea?
What would they do differently?

What challenges could the idea face?

Who would champion it?
What would they say?

Who would use it?

Why would they value it?

Identifying innovation

Does it solve a genuine problem?

Does it open up space for a new opportunity?

Does it help people do more with less?

Does it generate real excitement?

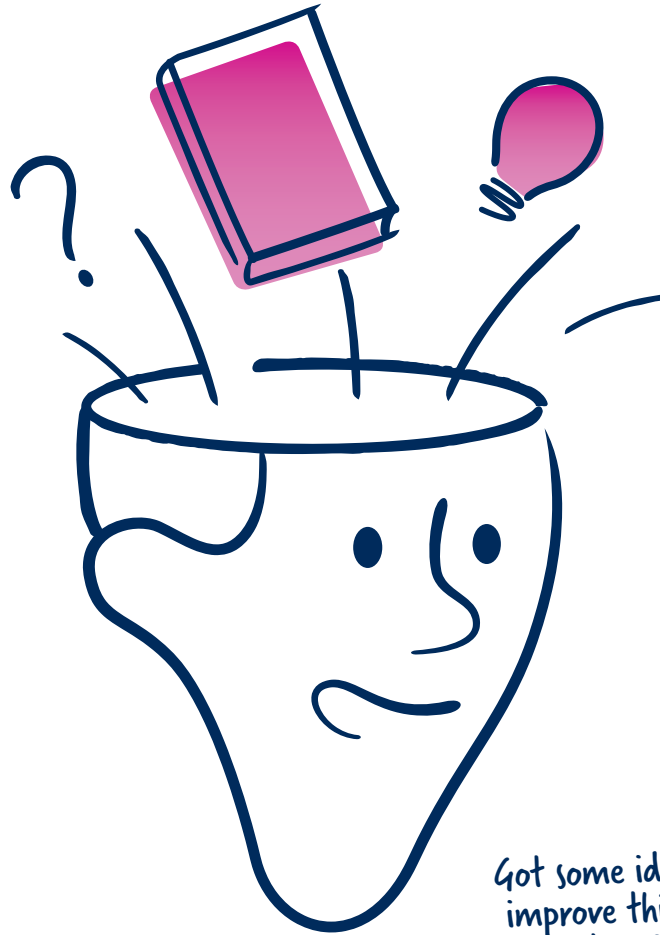
Does it have the potential to make the teams life easier or more pleasurable?

Do the numbers stack up?

Can it be delivered in the short term?

Will it be worth the effort?

Learnings



Got some ideas on how we could improve this kit? Let us know at marketing@netwealth.com.au

Five key learnings from your innovation session(s):

1.

2.

3.

4.

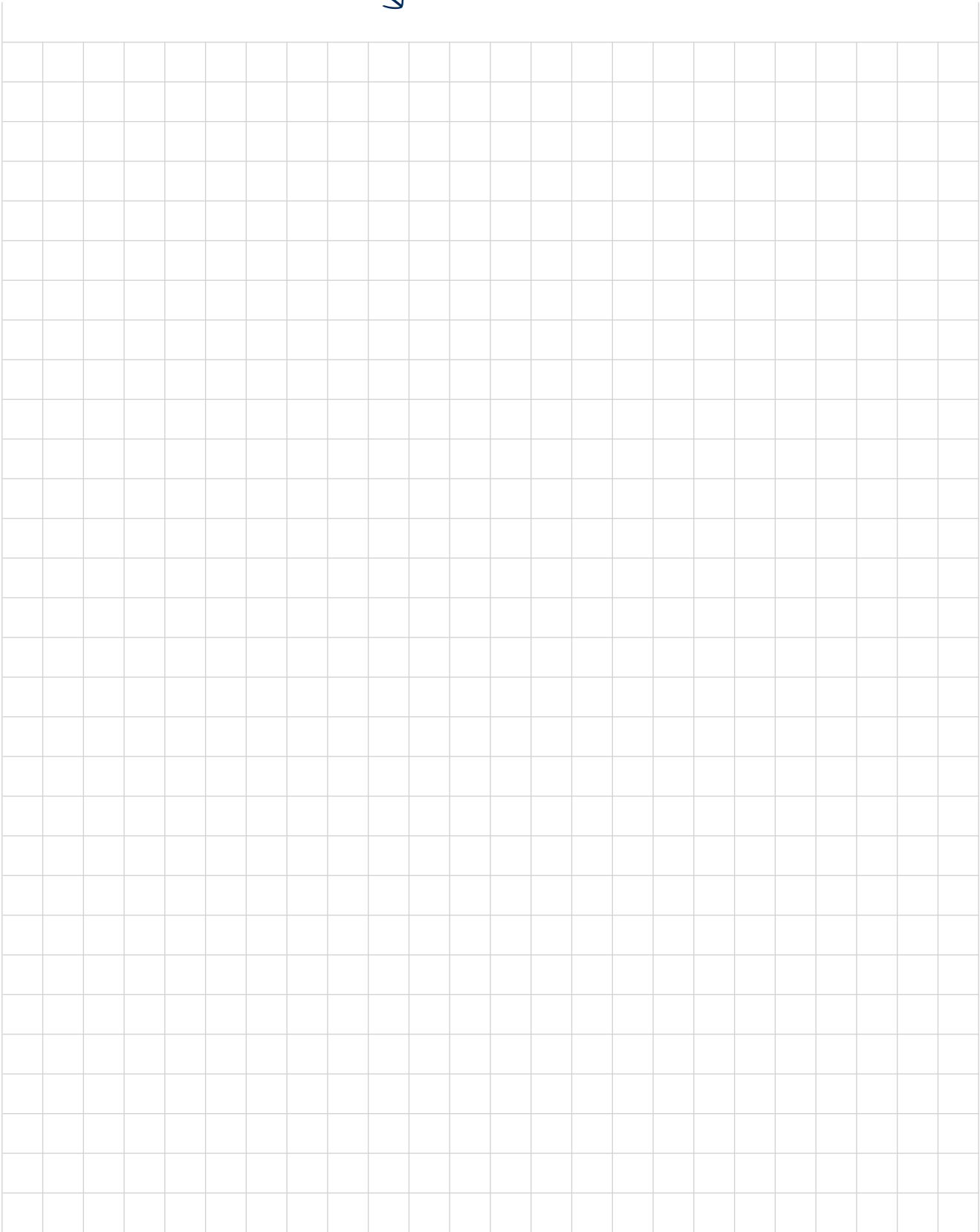
5.

What could you bring or do for the next session to get more out of it?

What worked well or didn't work about the venue, set up and materials?

Notes

A grid to help sketch ideas ↘



**“Innovation distinguishes
between a leader and
a follower.”**

— Steve Jobs

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