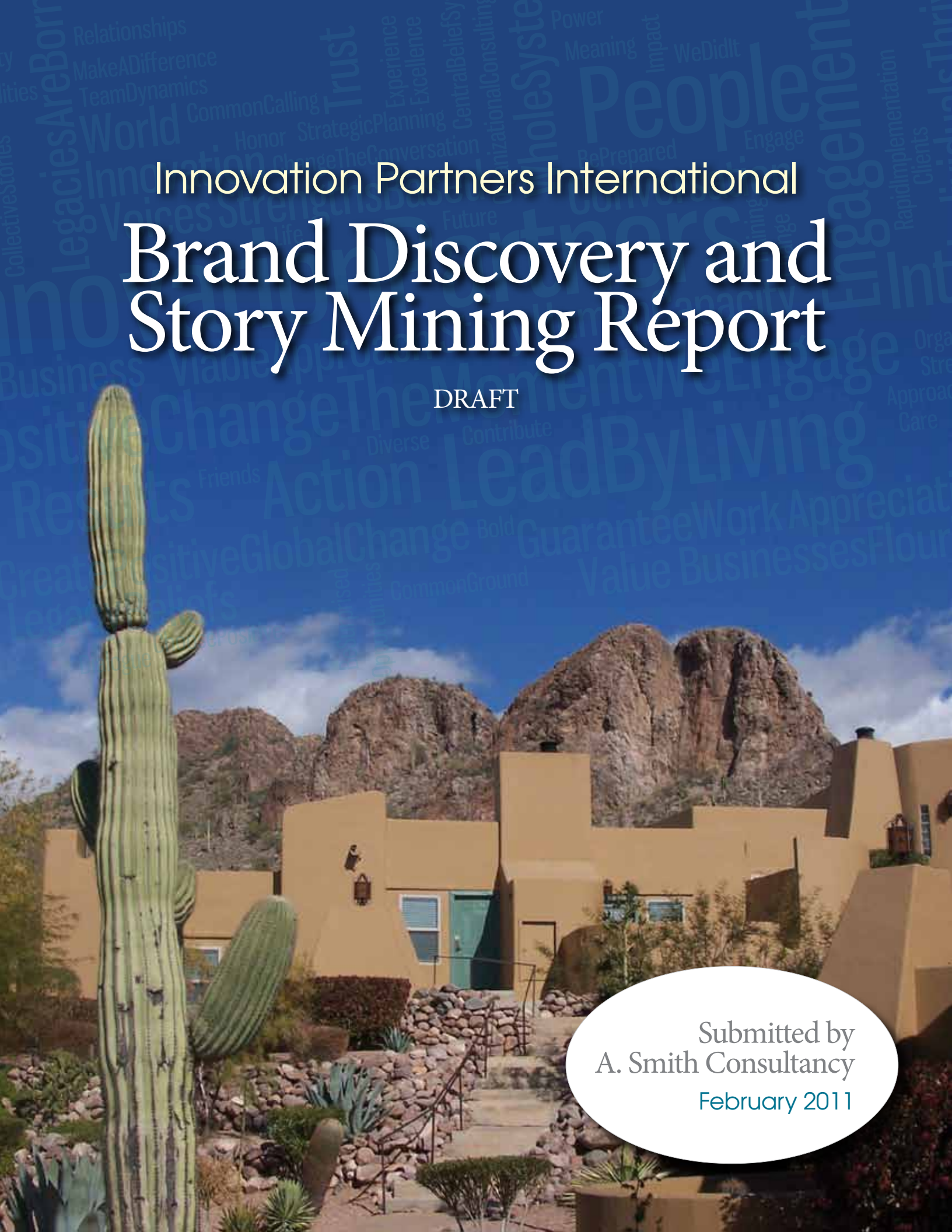




Innovation Partners International

Brand Discovery and Story Mining Report

DRAFT

Submitted by
A. Smith Consultancy
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BACKGROUND & PURPOSE

Innovation Partners International has a bold vision: to achieve **FIVE in FIVE** – \$5 million company, five percent giving back, and five key clients in five years. The organization is taking clear steps toward realizing this goal, including deciding how they want to show up in the marketplace.

The purpose of our Brand Discovery and Story Mining Process in Arizona was to co-create a clear, concise, and unique brand positioning strategy for Innovation Partners, as well as to uncover key messages and story ideas that will resonate with people in meaningful ways.

The following brand platform will serve as the foundation for all future communications efforts.



“We aren’t
just unified,
we’re a tribe.”

IDENTITY:

“Who are you and why should anybody care?”

The following information captures the essence of Innovation Partners International's core identity: who you are, what you do, why you do it, and why the marketplace should care.

A. Smith Consultancy will use these concepts as the framework for message creation and for communicating with target markets, including the media. More importantly, as an articulation of your brand, this report represents what Innovation Partners will need to bring to life and to consistently live.

The brand differentiation, core benefits, emergent themes, the why, key messages, position statement/tagline, and story ideas provide specificity and focus for all communications activities. These elements will serve as building blocks for branding strategy and tactics.

DIFFERENTIATION:

“What is unique about your organization?”

IPI partners bring their innovative positive change model to life both in what they offer their clients and in the everyday fabric of their lives. In doing so, they are proving a viable approach to organizational excellence, where individuals thrive, businesses flourish, and legacies are born.

VALUE PROPOSITION:

“What are the benefits of partnering with Innovation Partners?”

Successful organizations position themselves in the mind of the consumer as a “solution” to a problem or “answer” to a need. In order for the consumer/client to trust and, ultimately, become loyal to a product or service, they need to connect with it on both an intellectual and an emotional level.

During our facilitation, we invited partners and associates to put themselves in the shoes of their customers and define functional and emotional benefits. We also interviewed four Innovation Partner clients to gain their perspective.

Here are the strongest benefits that emerged:

CORE FUNCTIONAL BENEFITS:

- Breadth and depth of experts from different walks of life across industries and across the globe
- Whole systems, strengths-based approach
- Shift in the conversation
- Innovative opportunities
- High level of engagement
- Commitment to action
- Lasting human and business results
- Increased bottom line

During our summit, we heard a lot of other great benefits. Next to the core benefits, here are 10 that were communicated loud and clear:

- Collaboration
- Happy employees
- Retention
- Increased pride
- Efficiency
- Shareholder value
- Sustainable growth
- Meaningful work and life experiences
- Enhanced leadership
- Ability to anticipate and respond to changing business conditions



“We bring unlikely voices together and help them build on common ground.”

CORE EMOTIONAL BENEFITS:

When I work with Innovation Partners I feel:

- Listened to, affirmed, like my voice is relevant
- Valued — I'm their most important client
- Confident — I can do this, achieve more
- Trusted partner — relationship piece
- Stretched/challenged

Other top responses:

- Positive, optimistic, hopeful
- Inspired
- Creative
- Energized
- Excited



“It’s not an
accomplishment,
it’s a legacy.”

CORE VALUES

- Integrity
- Congruency/authenticity
- Community/collaboration
- Positive attitude/optimism
- Innovation/creativity
- Learning/curiosity
- Passion
- Greater Good
- Confidence
- Democracy

TARGET MARKETS

Primary —

- Social profit/enterprise
- Health care
- Government
- International development
- Education

Secondary —

- Manufacturing
- Sustainable/green
- Large corporations
- Defense & intelligence

Others—

- Pharma
- Long-term care
- Eldercare
- Emerging communities

“People need to have places to be joyful and to achieve what they want to.”

EMERGENT THEMES

Strength-based approach

Unlike most consultants who go into a business or community and ask, “What’s wrong and how do we fix it?” Innovation Partners dismisses deficit-based thinking and instead asks, “What’s right and how do we build on it?”

IPI partners use game-changing positive approaches such as Appreciative Inquiry and SOAR to shift conversation/consciousness, build consensus, and generate creative and innovative solutions.

Whole systems approach

Innovation Partners engages all stakeholders, taking a whole systems approach in designing the future. This offers clients a tremendous advantage because people commit to what they help create. In addition to working with whole systems within an organization, IPI has an amazing gift of taking a global perspective in everything they do.

They embrace the belief that organizations fit into a bigger picture (an even bigger system) and have the power to change the world. The health of organizations and communities inevitably affects the world. And, vice versa. IPI empowers the whole system allowing every individual, every organization, and every community they work with to achieve their full potential and to experience both joy and success (prosperity).

From chaos to convergence

Innovation Partners believe that the answers are in the room and communities self-organize to solve their problems. Their strength is helping organizations/ communities find underlying order in apparent randomness. They balance chaos and order where evolution is most at home. The result of divergent thinking is convergence in the end. It’s not uncommon for clients to ask, “How in the world are we going to do this?” IPI partners respond, “Trust the process.” And, it works.

Build human & organizational capacity

Like the old adage, “When people are hungry, feed them, leaving them the knowledge how to fish.” Innovation Partners builds human capacity to help people help themselves. They create an environment of positive individual effort.

They also focus on organizational structure to support future growth and plans. They create conditions to tap collective intelligence, and they create and promote conditions for self-organization. They broaden and build capacity for collaboration and achievement.

Rapid implementation

Innovation Partners move organizations and communities to their futures quicker. They compress what would take many firms a long period of time to accomplish into a shorter cycle. They get groups to come together quickly and provide rapid implementation even in situations that look impossible.

Democratic workplace

Innovation Partners is on the World Blu List of Most Democratic Workplaces 2010. Organizational democracy is a system of organization that is based on freedom, instead of fear and control. It's a way of designing organizations to amplify the possibilities of human potential – and the organization as a whole. The core of organizational democracy is allowing people to self-govern and to determine their destiny. Organizational democracy is about decentralized networks, universal ideas, conversation, meaningful work, profits and people, ongoing participation, a dynamic environment, etc.

It's all about people

IPI partners have a deep connection with people and are empathic to their needs. Behind everything they do is an unshakable belief that people can create anything. Partners know that at the center of organizations are people – people are the lifeblood, the root of success. Innovation Partners have a heartfelt relationship with clients. Their clients are their friends. They give everyone a voice because, to partners, everyone matters. Their legacy is to empower people to lead better lives.

Lead by living

Their business truly reflects what they believe business should be. They don't just practice what they preach; they live it (“We live our process”). They take an appreciative approach to work and to life, and integrity is part of their DNA.

From their democratic structure, to their allegiance to and use of strength-based processes (appreciative inquiry, open space, etc.), to their open and inclusive conversations, Innovation Partners brings their offerings to life. When clients ask, “How do we know this will work?” Innovation Partners can confidently respond, “Because we live this.” And, they do.

Intrinsic motivation

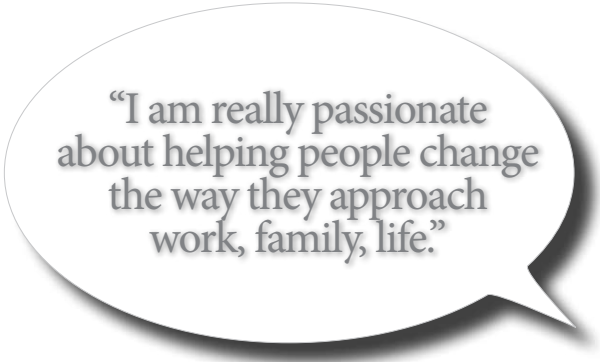
Deeply embedded in every Innovation Partner member is a desire to help others and contribute to the world. While most consultants are continuously looking for more ways to make money off a client, these partners strive to work themselves out of a job. They are enriched by the experience of working with others. They believe in doing the right thing. And, ultimately, their focus is not simply helping clients win in the marketplace but also on leaving a legacy.

GETTING TO THE CORE... THE WHY

During his TED Talk, “How great leaders inspire action,” Simon Sinek shares a simple but powerful model for inspirational leadership: The Golden Circle. His argument is that while most businesses only tell what they do and how they do it, great brands tell WHY they do it. His examples include Apple, Martin Luther King, and the Wright brothers.

He asserts that the goal is not to sell to people who need what you have but rather to sell to people who believe what you believe. This is what creates loyalty. In a nutshell, “people don’t buy what you do, they buy why you do it.” We agree, and based on our summit, interviews, and observations, distilled the WHY you do it.

(Simon Sinek TED Talk: <http://bit.ly/dR28LF>)



“I am really passionate about helping people change the way they approach work, family, life.”

WHAT WE DO (Features):

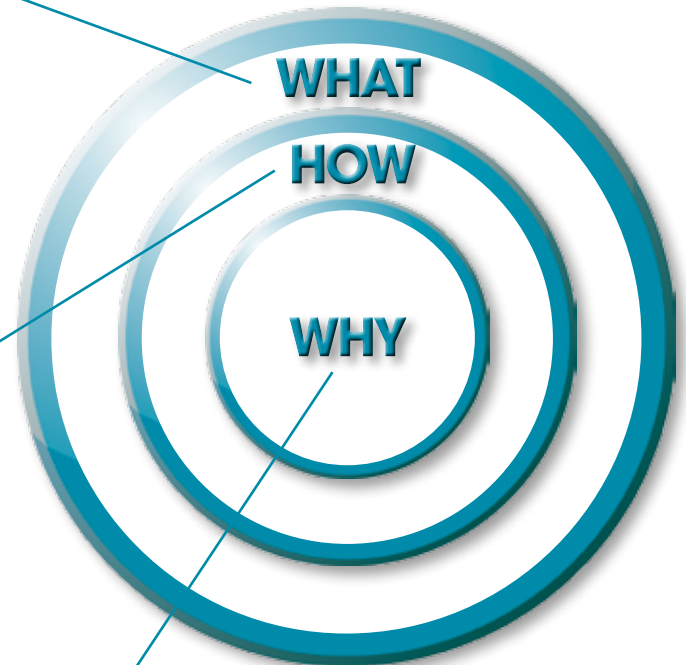
- Organizational consulting
- Strategic planning
- Change management
- Leadership development
- Performance management
- Continuous improvement & innovation
- Team building
- Executive coaching

HOW WE DO IT (Processes/benefits):

We...

- Offer breadth & depth of expertise
- Use appreciative inquiry & additional strengths-based processes
- Change the conversation
- Engage the whole system
- Build consensus
- Build organizational & human capacity
- Uncover creative & innovative ideas

WHY WE DO IT (Our purpose):



CO-CREATE POSITIVE CHANGE

POSITION STATEMENT — TAGLINE

The position statement captures the essence of your brand – it is your brand promise. It differentiates you in the marketplace and communicates your value to your customers. Position statements can be used as taglines, and this is our recommendation.

In an over communicated world, a good tagline used in tandem with a strong marketing program places an organization in a unique category relative to others. It separates and defines your organization.

Innovation Partners International
POSITIVE CHANGE THE MOMENT WE ENGAGE

“Be prepared to
be surprised.”

KEY MESSAGES

In building brand, it is important to define and communicate a key message with support points. These messages should be communicated in all marketing efforts. Whether a partner is talking with a prospective client, doing a media interview, or giving a speech, these points should guide their communication.

We believe tapping into the strengths of an organization or community and building human and organizational capacity leads to maximum results in abbreviated time frames.

1. We bring our innovative positive change model to life

We do this in the way we work with clients and in the everyday fabric of our lives. In doing so, we are proving a viable approach to organizational excellence, where individuals thrive, businesses flourish, and legacies are born.

2. We build on strengths

Unlike most consultants who go into a business or community and ask, “What’s wrong and how do we fix it?” Innovation Partners dismisses deficit-based thinking and instead asks, “What’s right and how do we build on it?”

3. Shifting the conversation uncovers innovative opportunities

By changing the conversation and reframing challenges into opportunities, Innovation Partners opens up the world of possibilities. And, they create environments for positive outcomes.

4. High engagement among all stakeholders translates to committed and inspired action

Innovation Partners engages whole systems in designing the future. This is a tremendous advantage because people commit to what they help create.

5. Lasting human & business results dramatically increase the bottom line

Innovation Partners delivers business AND human results. Their ability to engage people and achieve business goals simultaneously drives economic value.



“When we believe we can do it, everything changes.”

BRAND STORY

Stories inspire, excite, connect and motivate. It's critical that an organization take time to uncover, create, and communicate its own story. A brand story is conceptual and captures an organization's back-story, as well as its future one. It captures the essence of an organization and conveys its purpose, personality, and uniqueness.

The brand story serves as an internal compass and should be a guiding force in all aspects of internal and external marketing communication. A brand story communicates emotion and inspires an organization to move toward its vision of what can be. It also offers a script, a promise for how employees, customers, and all stakeholders will experience your organization. It is the foundation for all communications.

Innovation Partners International

Innovation Partners is a firm of diverse and highly experienced experts from different walks of life and from around the globe who are bound by a central belief system and who lead not merely by example but also by the way they live every aspect of their lives. Partners believe with every ounce of their beings that people can create anything, and they are intensely committed to empowering people and building their capacities to achieve more in business and in life.

Integrity is deeply embedded in their DNA, and their work is an expression of who they are. Their bold and innovative business model – a strengths-based whole systems approach built upon engagement, collaboration, shared voice, congruent beliefs, and democracy – is proving a viable approach to creating businesses and communities where individuals thrive, businesses flourish, and legacies are born.

IPI partners care deeply about each other, their clients, and the world. They are completely present and authentically human in their relationships. This leads to unparalleled openness and uncompromised trust with clients.

IPI partners take great pride in serving clients and are committed to creating value. They partner with clients to identify and build strengths, facilitate meaningful conversation, and engage whole systems to achieve lasting human and business results that dramatically increase the bottom line.

In working with clients, IPI partners have an uncanny ability to honor individual stories and harness collective ones simultaneously, unleashing the potential of both. This meaningful engagement leads to innovative thinking and commitment to action – quick action.



IPI partners use appreciative inquiry and other strength-based approaches to move clients to their futures faster. They bring unlikely voices together from the word go and build common ground even in situations that seem impossible. To them, nothing is impossible. IPI partners believe no matter how bad a situation, there's always something to build on, and they welcome clients to throw anything at them. Again, partners believe people can do anything and they believe in their process. When a client is in doubt, partners simply say, "Be prepared to be surprised."

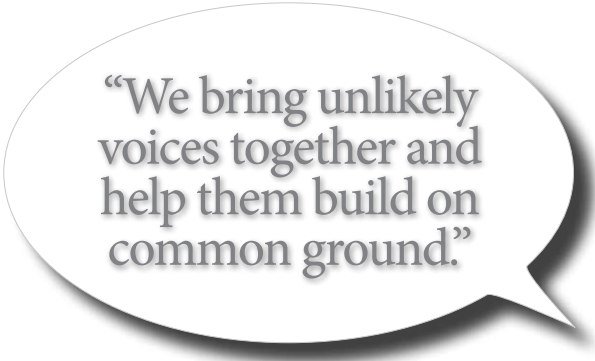
IPI partners can say this confidently because their work leads to results – always. Whether it's moving people into jobs, creating safer workplaces, improving healthcare in a meaningful way, or helping traditional companies be more successful, IPI partners helps organizations and communities realize their visions.

And, they give clients all the credit. IPI partners build human capacity to help people help themselves. They bring the old adage, "Teach a man to fish and you feed him for a lifetime," alive. They also partner with clients to create environments where collaboration and achievement flourish. IPI partners love nothing more than to hear clients say at the end of their work together, "Look what we did." Ultimately, IPI partners want to work themselves out of a job.

There's not a group of people that can impact an organization or community in a more powerful way to create value. IPI services, ranging from organizational consulting to strategic planning to facilitation to training to team dynamics, are second to none. IPI partners adhere to excellence and guarantee their work. They choose the positive and invite clients – and the world – to do the same.

Their common calling is to make a difference in the world by shedding a positive light — one person, one business, and one community at a time. IPI partners feel a sense of urgency about their work in light of the world being so incredibly fractured at this time. They believe there's never been a better time to bring people together, discover common ground, and leverage strengths.

IPI partners are engaging people, changing conversations, presenting possibilities, and evoking action. They are creating positive global impact.



"We bring unlikely voices together and help them build on common ground."

STORY BANK

Based on our story mining interviews, we came up with dozens of potential story ideas/themes. In finalizing which stories we will focus on this year, we will need to keep in mind the following strategic considerations:

- Which of these stories best support your business goals?
- What level of participation/access will clients allow?

Once we address these critical factors and begin to package stories, we will also need to consider:

- Who is your audience?
 - a. Channel of communication (media, blog, speech, etc.)?
 - b. Local/regional or national?
 - c. Consumer or trade?
 - d. Etc.

In thinking about these considerations, analyzing the brand facilitation and story mining interviews, and looking at the marketplace, here are our recommendations in terms of uber themes and supporting story ideas:

(Please note, these story ideas, i.e. Tufts, Girl Scouts, etc, need work...this is just an outline/start...further conversation is needed)

1. Healthcare

Healthcare is clearly an area where Innovation Partners has done great work. It is also an industry partners identified as a focus for the future. And, it certainly is a hot topic in the marketplace. There is perhaps no other sector experiencing more upheaval than the healthcare sector.

- a. *Tufts Medical Center*
Story about how a strength-based approach can help reduce costs, improve patient care, and improve services, which are all critical issues in healthcare. This work combined power of story, data, and narrative to generate momentum and build “connective tissue.” Article could answer: “What does collaborative innovation in healthcare look like?”
- b. *Novartis*
- c. *Rutland Regional Medical Center*
- d. *Newark Beth Israel Medical Center*

2. International development

Stories about international development showcase another side of Innovation Partners and might “surprise” the reader. This angle reaches yet another audience and shows the expansive capabilities of IPI.

a. *Liberia*

Story of AI and natural resources, as well as Innovation Partners commitment to deforestation and sustainability issues (cross the line). Awareness of the role of deforestation in the climate change equation is increasing. Forests are rapidly disappearing around the world for a variety of reasons. “This phenomenon is occurring despite the vital importance of forests for storing carbon, conserving biodiversity, and providing clean water, food, medicine, fuel, and income to more than two billion people, including an estimated 350 million indigenous and tribal people.” (US Forest Service)

b. *Guyana Democratic Consolidation & Conflict Resolution (S. America)*

Work sponsored by US Agency for International Development (USAID) and the United Development Programme (UNDP). The objective was to engage regional leaders in a new conversation that would inspire collaborative community development and inclusive governance (in the wake of 2006 presidential elections). Outcomes included plans aimed at promoting gender equality, increasing parental involvement in youth education, rural infrastructure development, inter-religious collaboration, and leadership development.

3. Business stories:

Strength-based engagement leads to results

a. *Applying AI in mergers & acquisitions*

There are lots of ways we could approach mergers and acquisitions, a topic that’s hot in the business press. We could write a case study, do a retrospective (i.e. a year after a major merger, provide commentary on what a company did well, what it could have done better to have been more successful, or how it could have sped things up from a strengths-based perspective), position IPI leaders as experts who can comment on ongoing mergers and acquisitions, etc. We could also approach this topic from an academic perspective discussing the ins and outs of mergers and acquisitions – from overcoming clashes of culture to building on shared strengths to integrating technical architecture.

b. *Never let a crisis go to waste*

Innovation Partners emphasized time and time again to “throw anything at us.” To them, no matter how bad the situation, there is always something to build from. We could spotlight IPI’s work, as well as position IPI partners as experts the media can talk with when working on related business or human stories.

c. *Building an appreciative culture leads to economic value*

Here we can build the business case for building an appreciative culture centered on employee engagement. In developing case studies, we'll need to demonstrate tangible information – existing conditions, specific outcomes (i.e. retention increased x percent), how much money was invested in the process, etc. Dan's work at Jefferson Wells Great Lakes Region is a strong example.

d. *Nonprofit business series*

Innovation Partners has a strong history of working with nonprofits. We will explore how this experience translates to corporate American and vice versa – in other words, what can these sectors learn from each other. We will also identify ways AI transcends both. Case studies might include:

- Vision Council
- Neighborhood Centers
- Autism New Jersey
- Girl Scouts of America
- Salvation Army

Additional possibilities:

e. *Leading from your strengths*

f. *Layoffs: shifting from “Oh my, Gosh” to “Wow”*

g. *How to thrive and grow in the midst of economic downturn*

In developing these business stories, we will incorporate Chrysler, Bruce Power, etc., in addition to the above organizations.

Once we further build/finalize our story bank, we will repackage these 10-15 story ideas for use in media relations, social media, and thought leadership.



“Be prepared
to be surprised.”