

<b>Institution:</b> University of Sheffield		
<b>Unit of Assessment:</b> C-17 Business and Management Studies		
<b>Title of case study:</b> CLEAR IDEAS: improving innovation skills and organisational performance		
<b>Period when the underpinning research was undertaken:</b> 2000–2020		
<b>Details of staff conducting the underpinning research from the submitting unit:</b>		
<b>Name(s):</b>	<b>Role(s) (e.g. job title):</b>	<b>Period(s) employed by submitting HEI:</b>
Kamal Birdi	Senior Lecturer in Occupational Psychology	2000–present
<b>Period when the claimed impact occurred:</b> 2014–2020		
<b>Is this case study continued from a case study submitted in 2014?</b> N		
<p><b>1. Summary of the impact</b> (indicative maximum 100 words)</p> <p>To innovate, organisations need to not only be creative in generating solutions but skilled at putting them into practice. Creativity training tends to focus on the former whereas our research focuses on what influences both the generation and implementation of ideas. This knowledge was integrated to create a new innovation training intervention called CLEAR IDEAS (CI) first launched in 2005. Since August 2013, over 450 public, private and third sector organisations have attended CI innovation workshops around the UK and overseas. Their application of CI has led to significant, valuable organisational performance innovations across public and private sectors.</p>		
<p><b>2. Underpinning research</b> (indicative maximum 500 words)</p> <p>The CLEAR IDEAS (CI) innovation development methodology translates research findings on effective innovation into improved organisational practice by systematically developing the skills of employees and managers to both better generate (I.D.E.A.S. steps) and implement (C.L.E.A.R. steps) new ideas. CI was first launched in 2005, based on insights from research studies undertaken by Dr Kamal Birdi since 2000. It has been continually updated with ongoing research. Birdi's research has involved: a) investigating the major barriers to and facilitators of organisational innovation; b) identifying the knowledge, skills and other attributes required to overcome these challenges and be a successful innovator; and c) evaluating the effectiveness of training/development activities in this area [R1].</p> <p>From 2000, Birdi led Sheffield colleagues in conducting multiple studies evaluating the impact of creativity training and other interventions in organisations [R2]. These showed that: multiple factors influence the implementation of ideas and these are not the same as the factors affecting idea generation; different types of courses have different impacts; and there is a need to combine the strength of disparate approaches [R1]. Furthermore, from 2003-4, Birdi contributed to two literature reviews for the Department of Trade and Industry's 2003 UK Innovation Review. He co-authored the narrative review [R3] on people-related factors influencing organisational innovation, writing the chapter on topics such as employee motivation, skills, creativity training and leadership. He then contributed to the analysis and writing up of a systematic literature review [R4] on the factors influencing the uptake of new practices in organisations. These reviews showed that while innovative ideas can be plentiful, weaknesses in organisations (e.g. lack of stakeholder motivation or engagement, poor alignment of resources, unsupportive</p>		

leadership, unclear goals) can prevent them being implemented successfully and hence directly influenced the choice of the CLEAR implementation factors in the model.

Creativity training provision focuses predominantly on idea generation. Birdi's research strongly suggested a need for a new innovation training model which developed the skills of employees and managers to tackle both the creative and implementation aspects involved. Thus, Birdi created the CLEAR IDEAS model in 2005. The IDEAS (Illuminate, Detail, Erupt, Assess, Select) part involves the idea generation phase and builds on creative problem-solving research. The CLEAR aspect (Commit, Lead, Engage, Align, Review) is unique to the literature as it encourages participants to develop a plan for the implementation of their ideas and is based on key lessons evidenced from his own, and others', research [R1, R2].

Birdi has continued to lead Sheffield research on identifying barriers and influences on employee innovation [R5] and interorganisational collaborative innovation [R6]. These further supported the development of the collaborative aspects of the training (e.g. highlighting the importance of co-creating a shared vision and engaging a diversity of stakeholders) and the new digital toolkits introduced in 2014 and 2015 (which included additional focus on project planning arising from [R5]).

### 3. References to the research (indicative maximum of six references)

- R1.** Birdi, K. (2020). Insights on impact from the development, delivery, and evaluation of the CLEAR IDEAS innovation training model. *European Journal of Work and Organizational Psychology*, 1–15. <https://doi.org/10.1080/1359432x.2020.1770854>
- R2.** Birdi, K., Leach, D., & Magadley, W. (2012). Evaluating the impact of TRIZ creativity training: an organizational field study. *R&D Management*, 42(4), 315–326. <https://doi.org/10.1111/j.1467-9310.2012.00686.x>
- R3.** Birdi, K., Denyer, D., Munir, K., Neely, A. & Prabhu, J. (2003). *Post Porter: Where Does The UK Go From Here?* Summary report from AIM Management Research Forum. AIM. Available on request.
- R4.** Leseure, M. J., Bauer, J., Birdi, K., Neely, A., & Denyer, D. (2004). Adoption of promising practices: a systematic review of the evidence. *International Journal of Management Reviews*, 5–6(3–4), 169–190. <https://doi.org/10.1111/j.1460-8545.2004.00102.x>
- R5.** Birdi, K., Leach, D., & Magadley, W. (2014). The Relationship of Individual Capabilities and Environmental Support with Different Facets of Designers' Innovative Behavior. *Journal of Product Innovation Management*, 33(1), 19–35. <https://doi.org/10.1111/jpim.12250>
- R6.** Porter, J. J., & Birdi, K. (2018). 22 reasons why collaborations fail: Lessons from water innovation research. *Environmental Science & Policy*, 89, 100–108. <https://doi.org/10.1016/j.envsci.2018.07.004>

### 4. Details of the impact (indicative maximum 750 words)

REF2014 focused on the impact of a two-day CLEAR IDEAS (CI) workshop designed for public sector leaders in South Yorkshire. CLEAR IDEAS has expanded into new sectors and new CI digital toolkits have been developed by Birdi [R1, 5 & 6]. Through these pathways, Birdi's research has led to significant, valuable organisational performance innovations in many sectors.

Since August 2013, more than 1,800 people from over 450 organisations have taken part in CLEAR IDEAS workshops around the UK and overseas (Canada, Hungary) and across the **private sector** (Corinthia International Hotels, Cisco, Serco Consulting, AWE, Anglian Water, Landsnet, Microsoft, Ferrero, Ocado Technology, TGI Fridays); **public sector** (NHS Trusts, Ofwat, Department of Work and Pensions, Sheffield City Council, West and South Yorkshire Police, Network Rail); and **third sector** (VSO, YMCA, WWF, SightSavers International, StopAIDS, Christian Aid, MENCAP and SCOPE) [S1].

The CI training is now available as an iPad app (2014) and online version (2015). This increased accessibility enables users to more easily apply the model in the workplace subsequent to training. Through the online digital toolkit, we have been able to reach hundreds of users nationally and internationally (e.g. Canada, U.S., Australia, Malta, Poland, Iceland, South Africa, and Chile).

The intervention has provided a systematic, generalisable and flexible method for organisations to innovatively address challenges, offering the most value where there is an unmet need to co-produce innovation between users and providers.

### **Innovation in the water sector, leading to better regulation and a better deal for consumers**

Ofwat is the Governmental body responsible for the economic regulation of the water industry in England and Wales. Birdi's research into the need for greater collaborative innovation in the water sector [R6] was cited by the UK water regulator Ofwat in their 'Driving transformational innovation in the sector' Consultation Document in July 2019 to highlight the need for better take up of innovative solutions by water companies.

The report offered a number of strategies for consultation to improve innovation in the industry (e.g. innovation competitions, centre of excellence). Birdi was commissioned by Ofwat to run a consultation workshop using the CI model to increase its engagement with a range of water companies, suppliers, policymakers and academics. By applying the CI model, participants created a shared definition of innovation, identified major barriers to innovation and generated a range of strategies for overcoming those barriers. The workshop increased the volume and quality of feedback to Ofwat on the initial strategies proposed in the consultation [S2]. The results of the CI process influenced Ofwat's final strategy document published in December 2019.

Ofwat commissioned CI innovation training in February 2020. Attendees included Ofwat staff, members of other regulators such as the Drinking Water Inspectorate, National Resources Wales and the Environment Agency. The workshop aided cross-regulator collaboration and produced useful inputs for new innovation policy development. The Ofwat Principal (Strategy Focus) stated that CI had delivered "*a different approach to stakeholder engagement...and an indirect outcome of that is better regulation and at the end of the day, a better deal for consumers*" [S2].

### **Shaping of new water research agenda**

UK Water Industry Research (UKWIR) is an independent body, funded by the major UK water companies, responsible for facilitating the shaping of the water industry's research agenda. It has invested £15m in research over the last 15 years with a focus on answering 12 'big questions' around water delivery and treatment. Collaboration is key to their approach and between 2016 and 2020 UKWIR employed the CI model to engage a cross-section of industry stakeholders to develop their Research Route Maps for three big questions (drinking water

quality, zero pipe leakage and environmentally sustainable wastewater systems). A CI co-production workshop increased the zero leakage Route Map from 24 to 33 project areas [S3], including a new funded project on customer-side leakage approaches delivered in 2020. This engagement allowed UKWIR to create a research agenda more able to represent and meet the needs of water sector stakeholders.

### **Influencing how the Department of Work and Pensions (DWP) engages with people on benefits.**

In 2018, DWP was exploring a digital initiative for 200,000 people on benefits in the UK to receive a virtual consultation rather than a face-to-face meeting to improve access to job advice. DWP employed CI in a workshop with the Labour Market team to determine how the trial could be optimised in terms of design and delivery. However, the Diagnose aspects of the CI model showed participants *“there wasn’t the degree of consensus among stakeholders about the purpose and design of the trial that they had initially assumed”*. This resulted in DWP stopping the trial and redefining its terms before *“taking the trial forward on a firmer footing”* [S4].

### **Co-producing a new Special Educational Needs and Disabilities (SEND) vision and strategy for Sheffield City Council**

In early 2019, OFSTED published an inspection report criticising Sheffield’s SEND strategy, including lack of stakeholder engagement resulting in a number of actions. To address these, the council employed the CI model to run two co-production sessions to reshape their SEND Inclusion vision and strategy. CI allowed active engagement across a diverse range of stakeholders to collaboratively produce solutions. The resulting SEND Consultation Document stated that the CI model *“enabled us to co-produce our priorities and solutions working with over sixty individuals from our key stakeholders. This proved successful in identifying positive solutions and priorities which has formed the basis of the strategy”* [S5]. The workshops identified a need to improve communication with parents and young people and this led to a redesign of the local offer website to make it more accessible.

### **HEALTH AND SOCIAL CARE: Co-design of NHS health technology innovation programme**

The £2.5m NHS TestBed programme Perfect Patient Pathway (PEPPA) was set up in 2016 to pilot and evaluate a range of health technologies with patient groups and Primary Care Trusts. A key principle was to co-design the pilot projects. CI workshops enabled a range of stakeholders to identify their needs: *“The projects within the programme were designed in response to the perspectives of stakeholders on their priorities for care and the use of technology using the ‘Clear Ideas’ method”* [S6]. The report evaluation stated that *“Engagement workshops were really helpful for the identification of unmet needs”* [S6].

### **Enhanced pupil performance of a Primary School**

In September 2015, a CI workshop was conducted with staff of [Text removed for publication] a Primary School. Consequently, new focused strategies for maths and literacy improvement were introduced for pupils, including splitting up classes into more age-relevant groups on certain afternoons and introducing bespoke booster classes. The Head Teacher has attributed these strategies to a subsequent annual improvement trend in OFSTED-rated SATS performance for Writing (+3.03% above national average in 2016, +3.48% in 2017 and +4.00% in 2018) and for Reading: (-0.67% in 2016, -0.47% in 2017 and -0.4 in 2018). Further innovations included introducing social media to engage more effectively with parents, creation of new roles and

gaining additional funding to open up early years provision. Enhancements such as these facilitated the school being able to join [Text removed for publication] an Academies Trust in 2019. As the Head stated CI app enabled “*how and what different solutions could we come up with, because actually that is the key to improvement in performance in schools*” [S7].

#### **LEISURE AND TOURISM SECTOR: Improving the quality of customer service in Corinthia international hotel chain**

In November 2017, Birdi ran a two-day CI workshop with managers from Corinthia hotels in Budapest, Malta, London, St Petersburg, and Prague. By March 2018, participants had used the CI digital apps to generate and implement a range of innovative strategies to deal with customer service quality problems that were being faced by them. In Prague, restaurant service was reorganised which led to reduction of customer complaints to almost zero and generation of substantial additional revenue of €72k for the rest of 2018 [S8]. In Budapest, sharing of resources, suppliers and roles with a smaller sister hotel led to notable financial savings for the smaller hotel. In Malta, simplifying the registration card reduced the customer check-in time by 1.5 minutes and English lessons and training in guest names improved employee engagement with guest scores by 10% [S8]. This shows that with the addition of the CLEAR implementation in CI workshops participants were better able to realise the benefits of their creative ideas.

#### **Setting up a technical skills training school inside an energy industry company in Iceland**

Since 2014, a major Icelandic energy infrastructure company Landsnet, has used the CI method to design and obtain investment for a major new in-house technical engineering skills training school. The school was initially met with some resistance among employees, but the CI process presented it as mitigating the loss of skills from the impending retirement of many workers. A pilot programme was run in 2019 and the school is now fully operational in 2020. “*The Landsnet Academy has taken training to new heights... and the results can be seen directly in new behavior at work... CLEAR IDEAS helped us arrive at the outcome much quicker than we would have done without it, the reason being that CLEAR IDEAS helped us keep track of everything that we did and acted as a manual for generating ideas and evaluating them, so it helped us prioritise and organise our ideas and also gave us the motivation that we needed*” [S9].

#### **5. Sources to corroborate the impact** (indicative maximum of 10 references)

- S1.** The workshops and participants numbers in CLEAR IDEAS workshops since August 2013.
- S2.** Confirmations from Ofwat Principal (Strategy Focus) of the impacts from CLEAR IDEAS.
- S3.** UK Water Industry Research (UKWIR) Research Route Maps.
- S4.** Department of Work and Pensions Strategy Directorate. Testimonial from Senior Manager.
- S5.** Sheffield Inclusion Strategy, 2020-2025 – Consultation document. Sheffield: Sheffield City Council and NHS Sheffield Clinical Commissioning Group.
- S6.** Perfect Patient Pathway Test Bed Overview Report. June 2020.
- S7.** [Text removed for publication].
- S8.** Corinthia Hotels case studies of results from participation in CI workshop and 1 year follow-up.
- S9.** Confirmation from Landsnet, an electrical/electronics manufacturing company in Iceland on CLEAR IDEAS contribution to the creation of a new training school.