



Innovation Strengths Preference Indicator®

Understanding ISPI™ Theory

Applying the iO™ and iOM™

A Companion Guide to the ISPI™ Feedback Report



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Understanding ISPI™ Theor: Applying the iO™ and iOM™

As CEO of Idea Connection Systems, Inc., I want to personally thank the following people who helped us to develop the ISPI™. Each in their own way made important contributions to the development of this ground-breaking “indicator”: Laurence Van Etten, Gary Wilhelmi, Andrew Harrison, Ryan Ewers, Deborah Huisken, Fred Beer, William Wilson, Nancy Ciolek, Kim Wood, Jonminh Rosenfeld, Maggie Rosenfeld, Deborah Rosenfeld, Bill Howland, David Magellan Horth and Francois Nader, M.D.



Robert Rosenfeld
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ISPI™ Feedback Report

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The Purpose of This Manual

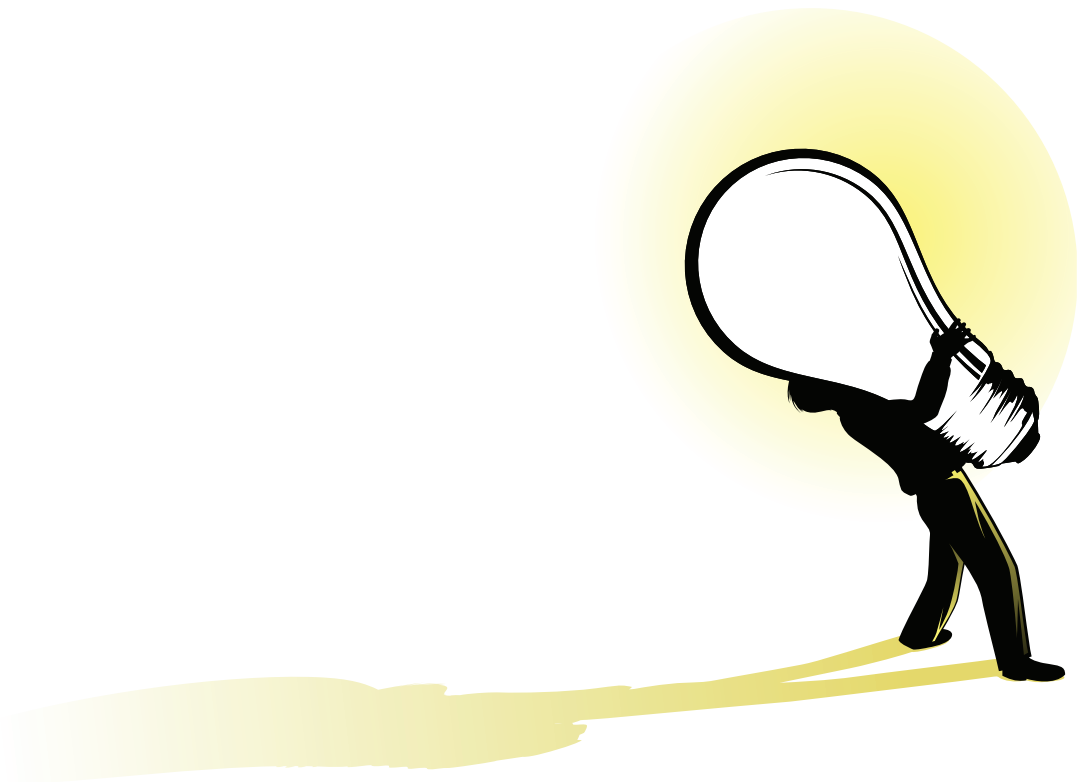
This companion guide to the ISPI™ Feedback Report was written to provide a more in-depth look at the theory behind – and some of the many years of real-world experience that led to the development of – the ISPI™.

This booklet assumes you have a level of familiarity with the ISPI™. Perhaps you have taken the ISPI™ and have had feedback already or will be receiving feedback shortly. Or you may be planning to bring the ISPI™ into an organization, or pre-reading in preparation for an ISPI™ certification course. Regardless, this guide will help you understand the ISPI™ within the wider context of why it was developed and how people have been using it, with some deeper-level information about the iO™ and iOM™ scores that is not in the Feedback Report.

In addition, this booklet reflects the extensive use of the current literature from which we drew when developing the Indicator, and some of the many theories that underlie the ISPI™. In developing this indicator we have drawn upon the work of scholars and researchers like Carl Jung, Katherine Briggs and Isabel Briggs Myers (MBTI), Michael Kirton (KAI), Will Schutz (FIRO-B), Kathy Kolbe (Kolbe A™ Index), Scott Isaksen (Creative Problem Solving Method), Stan Grysiewicz (Positive Turbulence), and Teresa Amabile (The Work Preference Inventory). It has been our intent, by maintaining a close adherence to the established literature, to ensure that the descriptions given in both the ISPI™ Feedback Report and this companion guide reflect the current research while using language that is accessible to most organizations (business, government and education). It links theory and experience, benefiting practitioners in the fields of creativity and innovation.

We end with a section on how to obtain buy-in for innovation in an organization, because we believe passionately that innovation is a key component in the world we live in today. Understanding and leveraging differences between people, helping them to see what may have been invisible to them about others, is what will help us learn to get along and thrive together on this planet of ours. To understand and leverage difference is to dig deeper into a person – below culture into their unique preferences. The ISPI™ looks at Affect, Conation, and Cognition to understand these preferences – and to “make the invisible visible”.

Part 1 Why the ISPI™ Was Developed



The Challenge of Sustaining Innovation

There are many factors that affect how people approach innovation. After decades of working with business, government, and other institutions, we have learned that four things matter when it comes to success at sustaining innovation. They are an organization's:

- People
- Goals
- Culture
- Systems

People come first because it is people who determine the goals, culture, and systems of the organization. Having said that, there are two "sides" to people that matter. One is their education and experience. This part is readily made visible to the organization via documents like a biography, resume, or curriculum vitae. But of equal importance is people's invisible and internal set of preferences or "orientations" that cross all three areas of mental functioning:

- Cognitive (thought)
- Affect (emotion-relating)
- Conative (instinctive-action)

Historically, researchers have studied these three aspects of brain function separately and developed separate instruments to make these invisible preferences visible to the rest of us. However, based on over thirty years of experience with innovation in large corporations as well as governmental and educational organizations, we came to understand that there was a need for one "indicator" that brought all three aspects of mental functioning together in one place with a focus on innovation. Both in terms of efficiency of use and cost-effectiveness, the ISPI™ was developed to make an understanding of how people and teams function in regards to innovation more accessible to all concerned with the process, because it is innovation that moves humanity forward, yet it is people who impact the speed, effectiveness, and sustainability of that movement.

We call it an "indicator" as opposed to an "instrument" because our goal is different from that of most researchers. The ISPI™ comes from an aggregate of over 100,000 person-hours of real-world experience working inside corporations and a variety of other types of organizations where the need is great to understand what works and what doesn't, and how all three elements of brain function impact how people engage with issues of innovation.

Here's an analogy: How do you know if an electric circuit in your house is working? You could use a voltmeter to test the circuit. Or you could plug in a light bulb and see if it lights up. Both work. The voltmeter will give you the additional information about the amount of "voltage" available in the circuit. But if your goal is just to see if it's working, the simplest way to do this is to plug in a light. With the ISPI™, we too are going for the simpler approach.

The Challenge of Sustaining Innovation

The ISPI™ accomplishes in 20 minutes or less what it used to take on the order of seven hours of multiple assessments and debriefs to achieve. The ISPI™ delivers a comprehensive view of a person, with a high degree of depth and complexity for that 20-minute investment of time. With it, we can predict with a quite comfortable level of accuracy what roles within an organization an individual will be able to fulfill successfully, and how effectively different teams of people will be able to work together.

As of this writing, the ISPI™ has been taken by over seven thousand people. In reviewing the results, we can say unequivocally that the ISPI™ produces a “face validity”, which means that those who have taken the ISPI™ will say that it provides an accurate indication of their predispositions. Those who have taken it have also been pleased with its ability to map and display all three of their brain functions in one place.

How The ISPI™ is Helping Today

One important lesson we have learned over the years is that, when forming innovation teams, there are factors that come into play beyond those that impact the formation of other types of teams.

It is of course important to have the right blend of education, skill, function, and experience on the team. However, it is perhaps more important to avoid total homogeneity on teams, to consciously build in variety. For example, suppose an organization were interested in pursuing a real breakthrough. On the front end of the process they would want a team loaded with Pioneers and Extreme Pioneers. But they will also want to have one or two Mid-Pioneers on the team who understand the dynamics of Pioneers and Extreme Pioneers to provide some grounding for the team. And because innovation is ultimately a “relay race” where the innovation process requires projects to be passed from one team to the next, having a Mid-Pioneer on the team who can help communicate with and possibly lead the next team and/or translate the Pioneer’s ideas and concepts for Builders and Extreme Builders will prove very helpful. Finally it can be crucially important to have mid-Pioneers and mid-Builders to serve as a “bridge” between people with these two orientations, as they are typically diametrically opposed to each other, and will often find it difficult to communicate.

ISPI™ results help both individuals and organizations become more productive and efficient in at least three primary ways:

1. Understanding their own ISPI™ orientations, they gain insight into why certain projects, tasks, or individuals appeal to them at work and why some don’t. We all tend to do our best work when we are working on projects that intrigue us, tasks that are enjoyable, and when we work with like-minded people. Understanding their personal ISPI™ is the first step in the process of selecting those projects, tasks, and people that can enable them to give their best to any endeavor.
2. Understanding the ISPI™ orientations of others is the second step in linking with other like-minded people to work on projects and tasks that suit them best, as well as understanding how to leverage differences that exist. There are two ways to do this:
 - The first is to have others in their organization take the ISPI™ and then share the results with each other.
 - The second approach is observation, which while not as accurate, does offer insight. There are some things people can observe in the way others work that will guide them in understanding who those others are and where they might be similar to them or different.

How The ISPI™ is Helping Today

3. Providing a shared language for individuals, teams and organizations to understand the human resources they have to hand, what gaps may need to be filled, and how best to use the resources they have is a third, very powerful use of this indicator.

- The language of the ISPI™ can be used to build teams and assign roles based on people's strengths, preferences, and therefore the situations in which they will be most productive, in addition to their more commonly-assessed domain expertise.
- ISPI™ terms and concepts provide a linguistic tool for coaching and mentoring others, helping them to understand themselves better by a deeper understanding of iO™ and iOM™ orientations.
- Having a common, recognized, and accepted language helps with interventions, for instance with a dysfunctional team or conflicts between leaders and others. The simple act of reframing an issue or a disagreement as a common human experience helps normalize and take the sting out of situations that otherwise might be contentious. It also gives people a format within which to start discussing their differences and how those differences can be resolved, bridged, or put aside.

Preference vs Capacity

As we've said elsewhere, the ISPI™ – which is made up of a person's iO™ and iOM™ measures a blend of cognitive, affective, and conative tendencies or preferences in the realm of decision-making, problem-solving, and creativity as it pertains to innovation.

However, note that the iO™ measures problem-solving orientation, not ability or capability to solve problems. A person's score reflects a preference for the kinds of problems they choose to solve and for the methods they use to solve them.

The iO™ is a measure of one piece of one's cognitive preferences. Cognitive preferences deal with how we perceive, think, solve problems, learn, etc. These preferences are based on observations that individuals organize their awareness in particular ways, and that this affects their behavior. Preferences are value free: one preference is not better than another. However, for specific tasks or under certain circumstances, one preference orientation versus another may produce greater results.

1. Who is creative?

Creativity is the generation of novel ideas, and is therefore a key component of innovation, which in turn is the achievement of a quantifiable gain that is the result of the creative process. It is important to an organization's health and well-being, if they want to remain in the forefront of their sphere of influence, to understand who their creatives are and how best to utilize these people's skills. People vary in how they are creative as well as in their problem-solving capacity. Creative problem-solving and decision-making is as much a matter of "orientation" as it is of "capacity". Confusion about who is creative results from a misunderstanding of the difference between orientation and capacity. A person's orientation describes how they prefer to approach innovation as well as work with others. A person's capacity describes their level of learned skill and ability which is determined in large part by education and experience. Both have been shown to be critical to the innovation process.

2. What are the Implications of Innovation Orientation?

People may not be able to fathom why others solve problems in the way that they do. Some of these misunderstandings may be an issue of not understanding the difference between orientation – or preference – and capacity.

No matter where a person's score falls on the iO™ continuum there are characteristic strengths and blind spots relative to specific goals and projects. An understanding of their score can help them to build on their problem-solving strengths.

People also have difficulty understanding how others go about seeking information, making decisions, what motivates them, and what determines how they like to approach and work with others.

Like their iO™, no matter what their iOM™ scores show, there are characteristic strengths and blind spots relative to specific goals and projects. An understanding of these Modifiers can help them go a deeper level build on their strengths as well as take advantage of the strengths of others.

When working with others, there are many different ways to tackle a problem and some of them may be just as effective as any other. Understanding innovation orientation aids in the appreciation of diversity, but it also implies the necessity for

Preference vs Capacity

the inclusion of different approaches to solving problems and for making innovation happen. What all organizations need is inclusion with diversity, not uniformity and sameness. This is possible if we appreciate and leverage differences by understanding the differences in not only capacity, but also in orientation.

Organizations need a mix of iO™ and iOM™ orientations to be successful, because the strengths of different orientations need to be utilized at different points in the evolution of a team, a new business, or an idea. It is the role of the innovation leader to orchestrate this use of “different orientations” to produce harmonious music.

3. Can orientation be changed?

To talk about orientation is to talk about preferences or tendencies. For example, although one may be able to write with either hand, we normally prefer one over the other. In the same way, we have an overall innovation orientation preference that we choose to work within more often than not.

A characteristic of cognitive strength is that it is pervasive, meaning that it enters into all aspects of a person’s life. Therefore, individual orientation in this arena usually does not change between work and play, or over time. On the whole, we prefer to use the orientation with which we are most comfortable. Having said that, we know that as people age, they tend to develop coping mechanisms that allow them to flex their orientation to fit a variety of situations, and beyond coping mechanisms, people do change over time. So there may be natural changes in the way they approach innovation and prefer to work with others.

In addition, certainly if one determines to learn to become less controlling or more open to risk they can make adaptations to their innate preferences, adaptations that, over time, can come to be the default position. An individual might be in a situation where they want to adjust their orientation to rise to the situation at hand. For instance, if they are working in an organization where a particular orientation seems a better fit plus they feel that job is particularly important to their immediate survival, they may consciously or unconsciously adopt an orientation that is not a perfect fit, but that serves that immediate need. Thus, taking the ISPI™ over time and during different times (while on vacation, between roles as well as while in a given role) can shed additional light on ones’ profile and preferences.

What is unlikely is for a change of orientation to be successfully imposed from without, e.g. by a manager or corporate dictate.

Benefits of Understanding ISPI™ Orientations

As you have seen thus far, the 12 orientations that the ISPI™ makes visible each lie along their own unique continuum. Once people are made aware of the definitions of both ends of each continuum, we have found that they can easily recognize where they fall on each of them, and where others fall as well. This makes the ISPI™ a useful tool for helping individuals, managers, and leaders leverage their unique set of innovation orientations as well as put together teams based on orientations that best fit the kind of innovation being pursued, whether continuous improvement or breakthrough innovation or something expansionary in between.

Additionally, there are 5 stages that people can go through when trying to build more effective relationships. By understanding and applying them, it is possible to move through them to learn how to effectively work with the types of differences that the ISPI™ makes visible. They are as follows:

1. Unconscious alienation and distrust based on differences
2. Conscious awareness and focus on differences
3. Acceptance of differences
4. Appreciation of differences
5. Leveraging differences

The most effective teams understand, accept, and appreciate and leverage their differences for the good of the whole.

1. Awareness of “individual” innovation approach:

Helps people to:

- recognize and understand their personal strengths, limitations and blind spots.
- see why people may not understand them.
- better understand their position in relation to group consensus.
- see patterns to the kinds of challenges or opportunities on which they prefer to work.
- see how they approach existing paradigms and look for problems.
- plan effective strategies for communicating with other people’s innovation orientation.
- understand their comfort with designing or improving processes.

Tells people:

- about the kinds of ideas they are likely to generate and how they approach “the system.”
- about the risks they will be most willing to accept.
- what battles they are likely to win and where they might be more effective choosing not to do combat.

Challenges them:

- to accept, appreciate, and leverage differences.

Benefits of Understanding ISPI™ Orientations

2. Awareness of a “team’s” innovation approach:

Helps teams to:

- understand each other better.
- identify likely group “blind spots” as well as key areas of strength.
- uncover variables beyond expertise to consider when designing teams.
- leverage their diversity for solving problems.
- increase team participation by defining individual approaches to creativity.
- assist team members to make appropriate contributions to team tasks.
- set up group norms and behaviors by understanding the diverse needs of individual members.
- improve efficiency and effectiveness, leading to better results

3. Awareness of the “organization’s” approach:

Helps organizations to:

- understand the type and nature of innovation they are pursuing
- see where there are gaps and blind spots
- make innovation happen more effectively and efficiently.
- discover how people’s personal orientation can match the company’s mission, vision or purpose.
- design structures and systems which validate differences to allow innovation to flourish.
- provide systems and structures for releasing creative potential
- promote a broad-based training effort that can meet diverse needs.
- promote unity of purpose with diversity of strengths.

Part 2 Understanding the iO™ and iOM™ at a Deeper Level

Understanding the Continuums

As shown in the Feedback Report, the Evolutionary to Revolutionary innovation scale aligns with the Builder to Pioneer scale and one's overall iO™ score comes from a combination of the Ideation, Risk, and Process scores.



If we look at the 12 orientations that matter to innovation, the strongest preferences fall on either end of the continuum on which they lie. People who fall in the middle of the iO™ (Mid-Builders and Mid-Pioneers) are different, not better or worse than either end. They are the Bridgers, the Connectors, people who are expansionary in their thinking, may be flexible and are good at connecting people, resources, time scales, etc.

Similarly on the iOM™ section, those who score on either end of the continuum will have stronger preferences than those that score in the middle which is known as the "Flex" preference. Those who flex prefer to alter their approach to problem-solving depending on the situation.

An example will help.

Let's look at the orientation we call "Input". When problem-solving, people seek information in either a sensory (or "Concrete") way or in more of an intuitive (or "Visionary") way. In terms of innovation, it has been our experience that people who prefer evolutionary innovation tend to be more "Concrete" in the way they gather information in general, while people who prefer revolutionary innovation tend to be more "Visionary" in the way they seek information and ideas. And the more extreme they are in either direction, the more likely they are to thrive at that type of innovation. So we designed the ISPI™ to look for the extremes or "edges" as we like to say. This allows individuals to see where they would best fit along the innovation continuum.

Clarifying iO™ Orientations

This section provides more information around Ideation, Risk, and Process orientations, as they differentiate Pioneers and Builders.

1. Ideation Orientation (I)

Generation of Ideas — Individuals with similar Ideation Orientation communicate more easily, and so should be grouped together at the initial, idea-generating stages of an innovation project.

Builder strengths

- Offers a sufficient number of ideas
- Will self-censor irrelevant ones

Pioneer strengths

- Generates large numbers of ideas
- Unlikely to self-censor their ideas

2. Risk Orientation (R)

Sensitivity to Rules and Group Norms – Individuals with similar Risk Orientations have a sense of trust and share a common method of strategizing.

Builder strengths

- Seeks to build and maintain group consensus
- Demonstrates respect and appreciation for rules and norms
- De-risks, decisions, processes, etc
- Appears “risk-averse” to Pioneers

Pioneer strengths

- Prefers to “rock the boat”
- Irreverent to norms and rules — will take risks — often doesn’t see them
- Will take risks — often doesn’t see them as risky.
- Appear risk-prone to Builders

3. Process Orientation (P)

Development of Systems and Structures — Those with similar Process Orientation work more effectively with one another.

Builder strengths

- Creates systems that are more detailed and most likely to be external to the innovator (and visible to others)
- Can work with detail for long periods of time

Pioneer strengths

- Creates systems that look at the big picture and are more likely to be internal to the innovator (and invisible to others)
- Can work with detail for short periods of time

Clarifying iO™ Orientations

4. Overall Orientation (Total)

On the continuum from evolutionary to revolutionary innovation, the orientations of both Builders and Pioneers are needed to cope with the variety of situations that occur over time.

BUILDER

Possible advantages of a Builder score:

- Predictable and stable
- Good manager of time and money
- Comprehensive planner
- Applies structure to creative ideas
- Creative in productive ways

Possible Disadvantages:

- Cautious risk-takers (closed-mindedness)
- Avoids rocking the “organizational boat”

PIONEER

Possible advantages of a Pioneer score:

- Flexible
- Unconstrained by limited resources
- Enthusiastic
- Breaks new ground
- Productive in creative ways

Possible Disadvantages:

- Capricious risk-takers (arrogance)
- Seeks change for the sake of change whether or not it’s productive

Remember: whatever seems advantageous in one situation can be disadvantageous in another!

COMFORT ZONES

BUILDERS

- Prefer to do things better
- Cautious when considering novelty
- Difficulty in making paradigm shifts
- Prepared to take risks within the paradigm (safe arenas)

- Risks cause anxiety
- Promote, enforce and protect rules and societal norms
- Have discomfort with people who break rules, but ready to amend them when needed
- Good at setting up systems to manage assets

PIONEERS

- Prefer doing things differently
- Prefer considering novelty
- See paradigm shifts as necessary
- View risk as an obvious course of action
- Are stimulated by risk
- See rules and societal norms as flexible or else confining
- Unconsciously “breaks rules” as a way of life — do not see the “boundaries” seen by others
- Create systems that appear unstable but novel — threatens asset management

How Builders and Pioneers See Each Other

SOME OF MY BEST FRIENDS ARE...

People at opposite ends of the iO™ continuum, by the nature of their approach to problem-solving, can all too readily acquire an aversion for each other. This manifests itself in a variety of ways. One of the more descriptive ways is name-calling. There are also a considerable number of cartoons that make fun of these opposites. While it is fun to laugh with others and at ourselves, it also gives us insight into the differences that make us human.

BUILDERS	PIONEERS
<i>Pioneers call Builders:</i>	<i>Builders call Pioneers:</i>
Nerd	Weird
Bore	Unsound
Bean Counter	Unrealistic
Bureaucrat	Space Cadet
Tight	Loose Cannon
Automaton	Dreamer
Robot	Unreliable
Droid	Flake
Brown Noser	Troublemaker
Copycat	Strange
Stick-in-the-mud	Unconventional
Conformist	Rebel
Politician	Heretic
Narrow-minded	Maverick
Party-liner	Renegade
By-the-book	Idealist
Tunnel-vision	Eccentric
Drone	Oddball
Dr. Jeckyll	Mr. Hyde
Compliant	Undisciplined
Dogmatic	Impractical
Inflexible	Insensitive
"Stuck-in-a-rut"	Abrasive

Yet each is needed by innovation-oriented groups to cope with the variety of situations that occur over time.

How Builders and Pioneers See Each Other

To further understand ones “opposite”, it can help to hear their perspective:

BUILDER	PIONEER
Pioneers supply task orientation without getting caught by the accepted theories of the past.	Builders supply stability, order and continuity.
Pioneers can break up entrenched groups and redefine lines of cooperation; generally challenge other people to go further, do more with less.	Builders maintain group cohesion and cooperation, are generally sensitive to other people.
Pioneers provide the dynamics to bring about periodic radical change.	Builders provide a safe base for riskier operations.

Exploring the Modifiers

It has been said that “the devil is in the details”, and this is definitely true regarding ISPI™ modifiers, which have a significant impact on how a person will show up on an innovation team. It is from here that much of the depth and complexity that the ISPI™ makes visible derives. How a person interacts with control (one of the most impactful of the modifiers); how relational they are or where they go to recharge their energy – all of the modifiers have an impact on the helping us understand the whole, sometimes contradictory person we each are. That is why it is important to spend time with ISPI™ totems to fully understand all the information they are capable of revealing. Building totems of close colleagues and friends can help shed light not only on those people and the relationships with them, but also on the intricacies of being human that the ISPI™ makes visible. It is this that makes innovation work challenging, complex, and for those who are drawn to it, eminently satisfying!

The following are suggested perspectives, the discussion of which can help build better teams by working with the Modifiers, or iOM™.

Control Orientation

- For people who love to take control, be aware that others may not wish to be controlled by someone else.
- For people who resist being controlled by others, be aware that others actually need to take control to minimize their own stress.
- For people who desire to be in control and want no one to control them, discussing this with others up front can best serve the team.

Relationship Orientation

- For people who love to develop many “more personal” relationships, be aware that others may be more private than they are.
- For people who are private by nature, be aware that others need to get to know people before they will be comfortable interacting with them on a regular basis.

Network Orientation

- For people who love to network and connect with lots of people, be aware that many people choose to keep their networks small and only enter them when there is an obvious need.
- For people who are not into large networks, be aware that some people thrive on building large networks so that they will have the contacts they need when the need arises.
- Use members of the team that like to network to meet the networking needs of the team.
- Team up a networker and a non-networker to reduce stress and help them learn to respect one another’s needs.

Exploring the Modifiers

Input Orientation

- For people who prefer looking at the big picture, be aware that others truly need to build their view of the world from the ground up.
- For people who need to build their world from the ground up, working with one fact at a time, be aware that others prefer to work in the opposite direction, starting with the big picture and then seeking only the facts that are truly required.

Flow Orientation

- For people who love to diverge and consider many ideas before seeking closure, be aware that others need to push for closure as soon as possible in order to be most efficient in everything they do.
- For people who need closure as soon as possible, be aware that others may need to keep the door open for a while in order to insure that all the possibilities for creative thought are pursued.

Passion Orientation

- For people who love to take quick action, be aware that others are more cautious in their approach and believe that prudence will pay off in the end by helping to avoid needless mistakes.
- For people who tend to be very slow to take action, be aware that others thrive on getting things done, and both expect and are comfortable with the fact that some mistakes will occur, but believe they can be dealt with effectively when they do.
- Based on the circumstances, the team (or leader) should choose the best action mode.

Output Orientation

- For people who believe that the external facts are all that matters, be aware that others place great emphasis on how various decisions will affect all the relationships between people because they believe this will make any decision easier to implement over the long haul.
- For people who believe that how decisions affect people is the primary thing that matters, be aware that others think that ignoring the facts or external realities is a recipe for disaster.

Energy Orientation

- For people who love to be with people all the time, sharing ideas and listening to others, be aware that some people need to get away and actually “sleep on things” in order to think things through.
- For people who need a lot of alone time, be aware that others truly need to be with other people if they are going to be able to think things through effectively.
- During the idea generation phase of a project, allow for alone time in addition to the requisite team-working time.

The Importance of the Modifiers

THE SPECIAL ROLES

In addition to the iOM™ descriptions, we have discovered over time that certain "edge" combinations of the Modifiers predispose people to take Special Roles. The Special Roles with the iOM™ traits that define them are:

- **Protectors** – Concrete / Converge
- **Trailblazers** – Concrete / Diverge
- **Seekers** – Visionary / Converge
- **Conceptualizers** – Visionary / Diverge
- **Cause-Drivers** – Visionary / Heart
- **Architects** – Visionary / Head
- **Initiators** – Relationship / Networker

Some people have one or more than one, but not everyone has one of these Special iOM™ Roles in their profile as not everyone scores on the "edges" of the continuum. Specifically, people who flex can change their preferences from day-to-day, project-to-project or situation-to-situation, which is a skill in and of itself, but their preferences are not strong enough to suit them for any Special Roles that we have identified. They are capable of fitting one or any of the Special Roles for a duration of time but will be unlikely to play the role(s) universally.

The Importance of the Modifiers

TEAM ROLES – SOURCES, AND HOW BEST TO USE THEM

One of our key goals in developing the ISPI™ was to help our clients make sure their people were placed on the right kinds of teams with the best possible fit. Hence, we developed the Team Roles, which are based on interactions between the iO™ and iOM™:

THE 6 INNOVATION TEAM ROLES ARE:	
CREATORS/DRIVERS	MANAGERS/SUPPORTERS
Idea Generator – Actively seeks out problems and ways to solve them.	Project Leader – Natural organizer, motivator, team manager and organization interface.
Intrapreneur – Sells new products/ services internal to organizations.	Gatekeeper – Has high level of expertise in one or more areas and is a resource for others.
Entrepreneur (Start Up) – Takes active risk to create new companies and ventures.	Sponsor - Well-connected and understand how to gather and utilize resources.

THE 7 INNOVATION CHAMPION ROLES ARE:	
UNDERSTAND THE SYSTEM	FACILITATE THE SYSTEM
Advocate – Promote success of idea and person.	Rambo – Will stop at very little to meet goals.
Mentor – Deep knowledge of existing systems.	Butterfly – Cross-fertilizes new concepts/ ideas.
Politician – Very astute and tactful goal setting.	Marathon Runner – Possess stamina for wisely chosen idea.
	Visionary – Sees what other may not.

This aspect of the ISPI™ is based on interview, surveys, assessments, and research of best practice in the field, all influenced by our goal of providing better and faster ways for our clients to construct and analyze teams.

Note that, based on their preferences, there are people who don't have natural team roles identified that they might play on an innovation team. This does not mean that they can't play particular roles, just that the roles are generally not comfortable if played for long periods of time. Conversely, some people might be suitable to play many roles in various areas of the innovation spectrum ranging from evolutionary to revolutionary.

1. Coping Behaviors

Coping behaviors are strategies and tactics that enable individuals with diverse orientations to work together more easily and effectively. They grow out of an understanding and respect for the value of difference. Coping behaviors can help people deal with coworkers who have a different iO™ or iOM™ or when they work in an environment that requires a different behavior than their preferred orientation.

The strategy behind coping behaviors is that one or both parties in a relationship modify their approach to presenting and reacting to ideas based on the ISPI™ orientation of the other person. By being conscious of another person's orientation, they can also anticipate some of their colleague's initial reactions and arguments, and have replies ready. They can work on building that person's trust and approval by behaving and communicating in their innovation orientation.

Coping behaviors are used for two reasons:

- **To improve a relationship**

By appreciating differences in people's iO™ and iOM™, people can reduce friction due to their new awareness that the cause might be a difference in orientation rather than a clash in beliefs. They can recognize strengths that can help solve problems in a different way than they might normally use, thereby reducing stress between themselves and others.

- **To reduce personal stress**

By learning to anticipate how another person will react, based on his or her orientation, they can avoid frustration by having a more productive response prepared.

Because it involves modifying their actions or methods of presenting their views by taking into account another's orientation, using coping behaviors can appear to be or feel difficult. While this may go against a person's grain, the benefit is the increased ability to avoid fruitless arguments based on how facts are understood or presented rather than what the facts are.

Few conflicts are based solely on a person's orientation. Differences in orientation can, however, get in the way of solving a problem and implementing a solution. They can intensify a conflict to the boiling point. Reducing friction that results from differences in orientation helps discussions become more productive and more efficient, and reduces feelings of aggravation and frustration among participants. It also helps people arrive at a better solution to the problem.

Coping behaviors are useful when a manager sees signs of orientation-based conflict between coworkers, or between him/herself and a direct report or peer. The manager can take one or both parties aside and, without necessarily going into the specifics of Innovation Orientation Theory, coach them in handling the conflict more productively.

STRATEGIES FOR DEALING WITH THE "OPPOSITE"

For BUILDERS

- Pioneers provide important input for generating novel ideas for an organization — **seek their advice.**
- Early negative judgment of ideas may stifle Pioneers — **critique ideas with an open mind.**
- In general, Pioneers provide scope; Builders provide detail — **collaborate for successful presentations.**
- Pioneers offer: novelty in Products, Processes, Procedures, High Energy for Start-ups, Manufacturing Alternatives, Vision, Revolutionary Changes.
- **Pioneers are a ready source of New Concepts for Development!!**

For PIONEERS

- Builders provide important input for integrating ideas into an organization — **seek their advice.**
- Generating many ideas overwhelms Builders — **offer ideas carefully.**
- In general, Pioneers provide scope; Builders provide detail — **collaborate for successful presentations.**
- Builders offer: Manufacturing Assurance, Quality Control, Process Capability, Implementation Skills, Systems Awareness, Continuous Improvement, Evolutionary Changes.
- **Builders fund New Concept Development!!**

STRATEGIES FOR BUILDERS WHEN DEALING WITH PIONEERS

1. To reduce personal stress BUILDERS should:

- I**
 - Anticipate tangential thinking.
 - Filter incoming information and floods of ideas.
 - Take most statements with a grain of salt.

- R**
 - Be aware of what rules are sacred to their opposites, no matter how obvious.
 - Separate values from procedures.
 - “Buckle their seat belts.”
 - Expect Pioneers not to see the boundaries.

- P**
 - Realize that changing a person is very difficult.
 - Selectively close their eyes.
 - Take time to learn the other’s “system” if possible.

2. For the betterment of a relationship BUILDERS should:

- I**
 - Provide anchor points of reality for the unusual.
 - Patiently “loop back” to the issue at hand.
 - Provide focus and a context.

- R**
 - Protect those who are unaware of rule-breaking consequences.
 - Prepare and intervene when necessary.
 - Express which rules and norms are non-negotiable.

- P**
 - Not impose unnecessary systems.
 - Express potential system needs.
 - Prove the system need first, then offer the solution.
 - Fully surround those in need of structure.

STRATEGIES FOR PIONEERS WHEN DEALING WITH BUILDERS

1. To reduce personal stress PIONEERS should:

- Expect rejections, and recognize that they are not personal
- I** • Anticipate being misunderstood.
- Anticipate losing mental connection with Builders when advancing concepts.

- Determine which rules and norms are sacred to the builder.
- R** • Prepare for consequences.
- “Count to ten” before breaking a rule.

- Not flog themselves for a lack of external efficiencies.
- P** • Stay out of the way while the system is running.
- Find safe havens for challenging the system.

2. For the betterment of a relationship PIONEERS should:

- Patiently evolve ideas beyond the paradigm.
- I** • Filter outgoing information and announce subject changes.
- Offer facts and identify speculation.

- Provide contextual basis for decisions.
- R** • Forewarn when they will be taking a rule-breaking action.
- Ask which rules are hard and fast and which are bendable.
- Ask others to flag what they consider to be “too far out”.

- Show appreciation and seek advice for systems and structure.
- P** • Find ways to comply with requests generated by the system.
- Not bad-mouth or belittle systems in the organization.

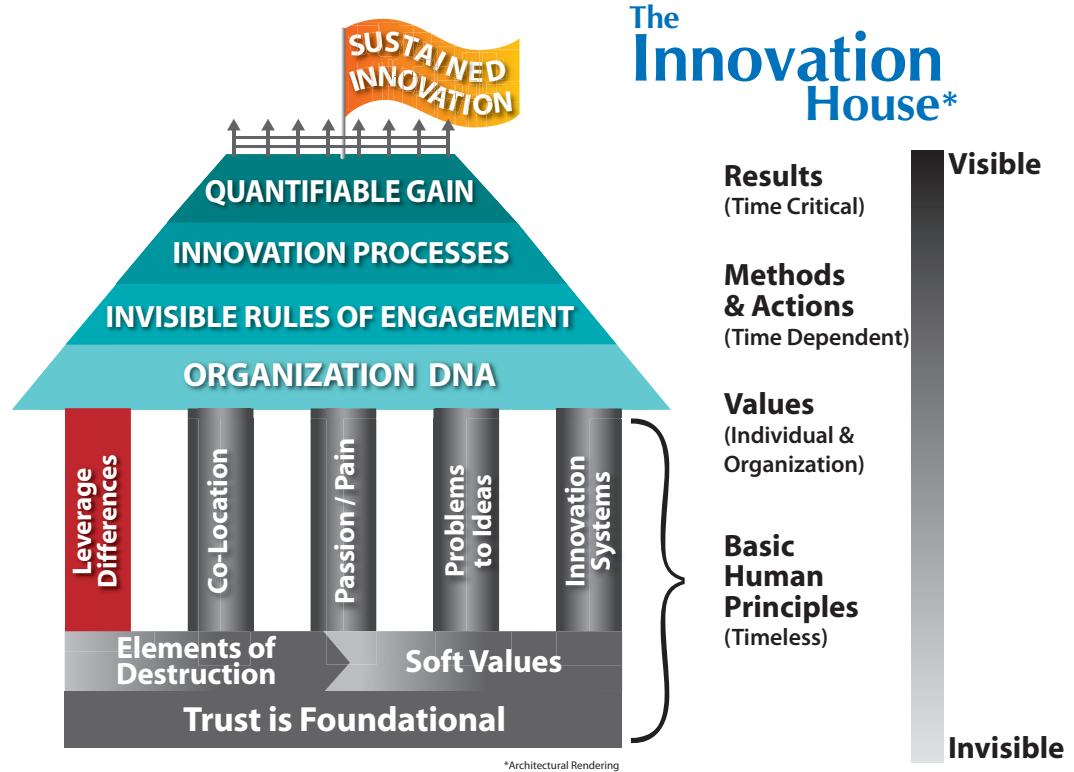
Strategies For Success Using ISPI™ Results

How Builders Complement Pioneers	How Pioneers Complement Builders
Builders supply stability, order and continuity.	Pioneers supply task orientation by breaking with the accepted theories of the past.
Builders maintain group cohesion and cooperation, and are generally sensitive to other people.	Pioneers often threaten group cohesion and cooperation, and are generally insensitive to other people.
Builders provide a safe base for riskier operations.	Pioneers provide the dynamics to bring about periodic radical change.
Builders provide important input for integrating ideas into an organization, — seek their advice.	Pioneers provide important input for generating novel ideas for an organization — seek their advice.
Early assessment of ideas stifle Pioneers — critique their ideas carefully.	Generation of many ideas does not impress Builders — offer ideas carefully.
In general, Builders provide detail; Pioneers provide scope — collaborate with them for successful presentations.	In general, Pioneers provide scope; Builders provide detail — collaborate with them for successful presentations.
Builders offer: Manufacturing Assurance, Quality Control, Process Capability, Implementation Skills, Systems Awareness, Continuous Improvement, Evolutionary Changes.	Pioneers offer novelty in Products, Processes, Procedures, High Energy for Start-ups, Manufacturing Alternatives, Vision, Revolutionary Changes.
Builders help fund New Concept Development.	Pioneers are a ready source of New Concepts for Development.

When Attempting to Persuade Builders:	When Attempting to Persuade Pioneers:
Give a clear, comprehensive picture.	Give the “big picture.”
Show how your ideas build upon the existing best practice.	Show benefits of radically new directions.
In presentation, be well organized and to the point — back up with a script.	Identify the cutting edge elements — back up with summary in bullets.
Provide checkpoints and an evaluation plan; emphasize need for considered approach to implementation.	Identify future trends; show how the idea sets the pace.
Provide information in advance; don’t “spring” pioneering, innovative ideas and expect immediate support.	When building is needed to support a pioneer’s innovative initiative, state a case for each need. Do not expect immediate support.
Do your homework — make your planning and preparation clear.	Recognize “breakthrough” thinking; provide opportunities for continued idea generation.
Underline that a pioneer approach changes paradigms — for the better.	Relate the idea to emerging issues that are unique and exciting.
Emphasize the need for some pioneering innovation in parts of even adaptive grand schemes.	Emphasize that precision and efficiency are needed in developing innovative ideas.

Part 3 ISPI™ Theory and Background

The Human Principles for Sustaining Innovation



In his book *Making the Invisible Visible: The Human Principles for Sustaining Innovation*, Robert Rosenfeld, founder and CEO of Idea Connection Systems, Inc., described Leverage Differences as one of the critical eight invisible human principles required to sustain innovation. The above illustration shows how Leveraging Differences fits into the Innovation House – the ISPI™ is incorporated into the extreme left pillar under Leverage Differences, supporting the processes that are more “quantifiable” at the top.

The eight human principles are as follows:

- Trust is the Means and Love the Unspoken Word.
- Soft Values Drive the Organization.
- The Elements of Destruction are Present at Creation.
- **Leverage Differences** (includes the ISPI™).
- Co-locate for Effective Change.
- Passion is the Fuel and Pain the Hidden Ingredient.
- Innovation Starts When People Convert Problems to Ideas.
- Innovation Needs a System.

Similarly, Peter Drucker said that “the most important contribution management needs to make in the 21st century is ... to increase the productivity of KNOWLEDGE WORK and the KNOWLEDGE WORKER”. He was making the case that we should be leveraging differences to increase the productivity of knowledge workers. In the 20th century, manual workers and industrialization was the main focus. The 21st century focuses more on innovation, hence Drucker’s challenge to empower the knowledge worker. With knowledge of self and others, the ability create “new” will be greatly enhanced in the 21st century workforce.

*Innovation House adapted from: Rosenfeld, R., *Making the Invisible Visible: The Human Principles for Sustaining Innovation*. Xlibris, 2006

The Role of Cognition, Affect, and Conation

Since we identify Leveraging Differences as one of the key principles essential to sustain innovation, this makes the ISPI™ a key tool in helping individuals and organizations do so.

As we have said in the Feedback Report, the ISPI™ looks at 3 unique aspects of a human being that determines how they approach innovation: Cognition, Affect, and Conation. These can be further broken down into 12 unique “orientations” that describe people's internal mental models, their internal predispositions for interfacing with others and finally their visible predispositions for action.

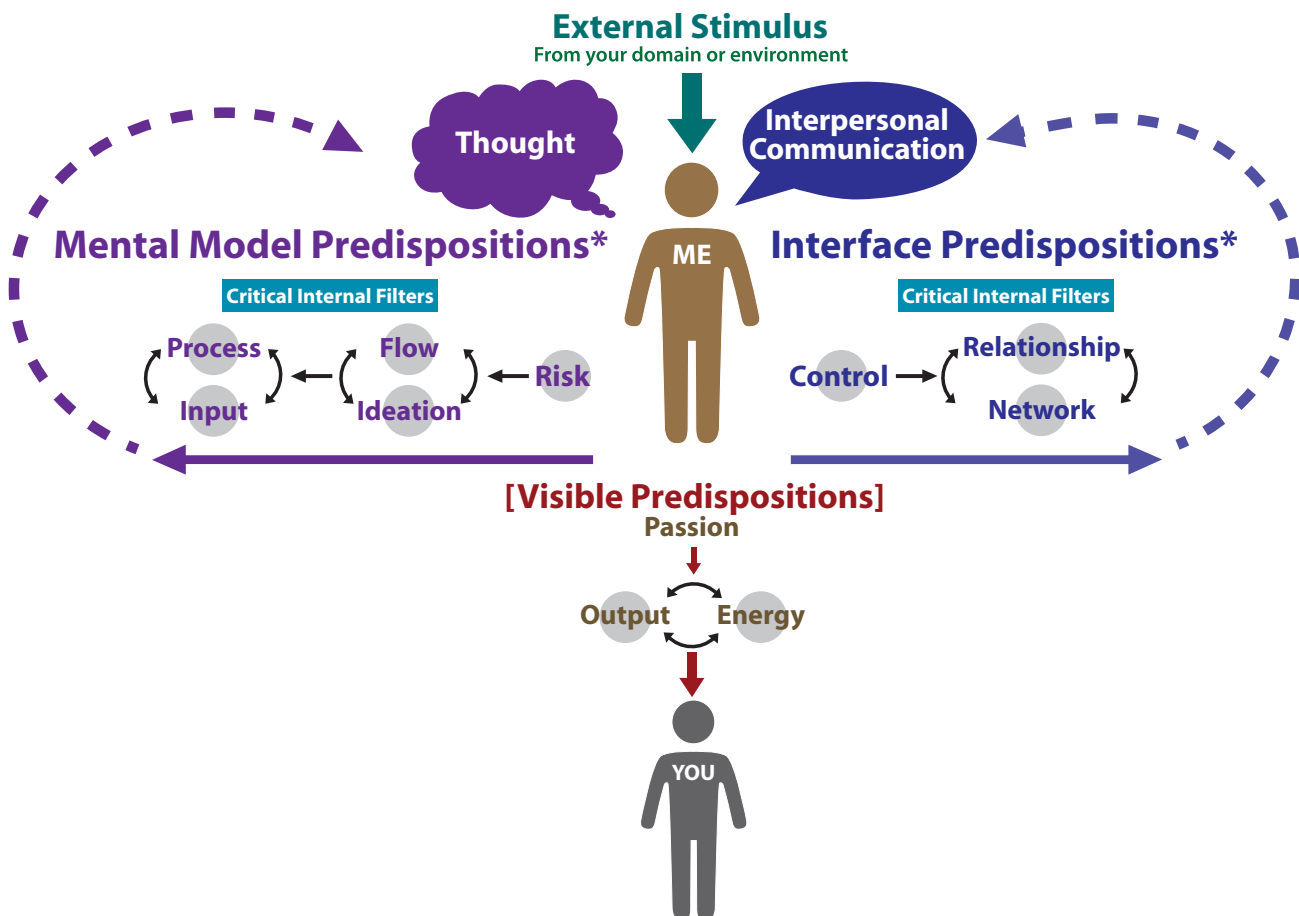
The following model makes visible how all 12 orientations work together.

Based on some External Stimulus from ones domain or environment, two sets of predispositions are engaged — Mental Model Predispositions and Interface Predispositions. Together they comprise 9 of the Innovation Orientations.

Mental Model Predispositions are made up of the following “Orientations” — Input, Flow, Process, Ideation, Risk, and total iO™ (which is not shown, since it is the sum of Process, Ideation, and Risk).

Interface Predispositions are made up of the following “Orientations” — Control, Relationship, and Network.

Visible Predispositions are then engaged as one interacts with the outside world. This is made up of the following “Orientations” — Passion, Output, and Energy.



The Role of Cognition, Affect, and Conation

Below is a list of the 12 “orientations” associated with their 3 “predispositions”, Mental Model Predisposition, Interface Predisposition, and Visible Predisposition

Mental Model Predisposition

- 1. Ideation Orientation (Cognitive)**
Approach to the generation of new ideas.
- 2. Risk Orientation (Cognitive)**
Approach to taking risks.
- 3. Process Orientation (Cognitive)**
Approach to establishing and following process.
- 4. Overall Innovation Orientation (Cognitive)**
The "sweet spot" for innovation.
- 5. Input Orientation (Cognitive)**
Where information is sought (Concrete to Visionary).
- 6. Flow Orientation (Cognitive)**
Preference for divergence or convergence.

Interface Predisposition

- 1. Control Orientation (Affective)**
Approach to taking charge or allowing others to take charge.
- 2. Relationship Orientation (Affective)**
Approach to establishing personal relationships.
- 3. Networking Orientation (Affective)**
Approach to establishing and being part of networks.

Visible Predispositions

- 1. Passion Orientation (Conative)**
How action is taken.
- 2. Output Orientation (Cognitive)**
How decisions are made.
- 3. Energy Orientation (Cognitive)**
Where problem-solving energy comes from.

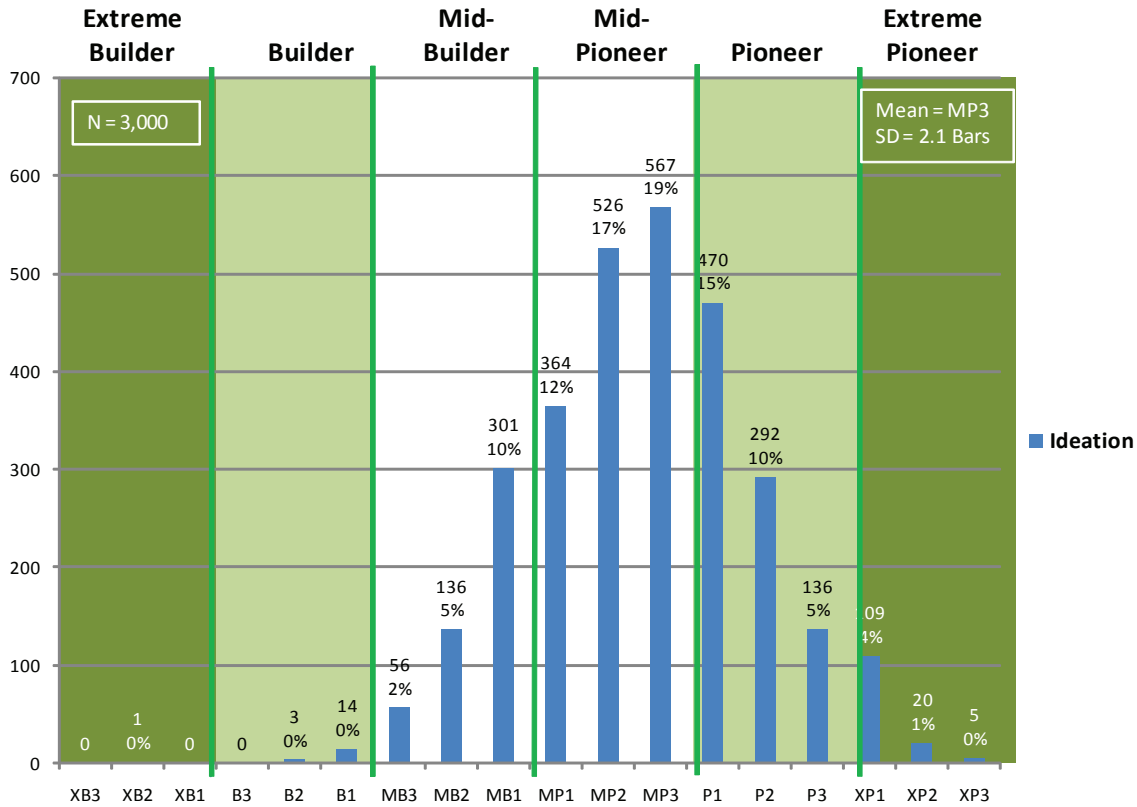
Part 4 Norms and Outliners - How One Population Tracked

iO™ and iOM™ Charts (a study using 3,000 ISPI™s)

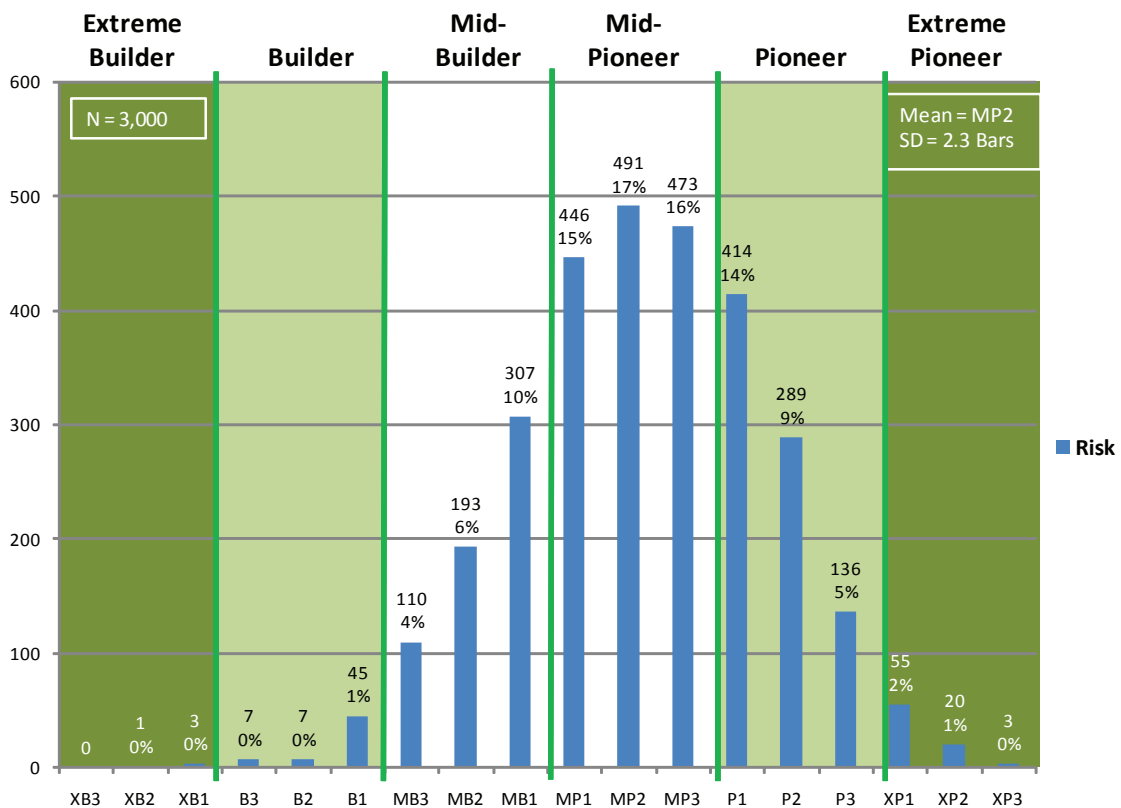
Overall iO™



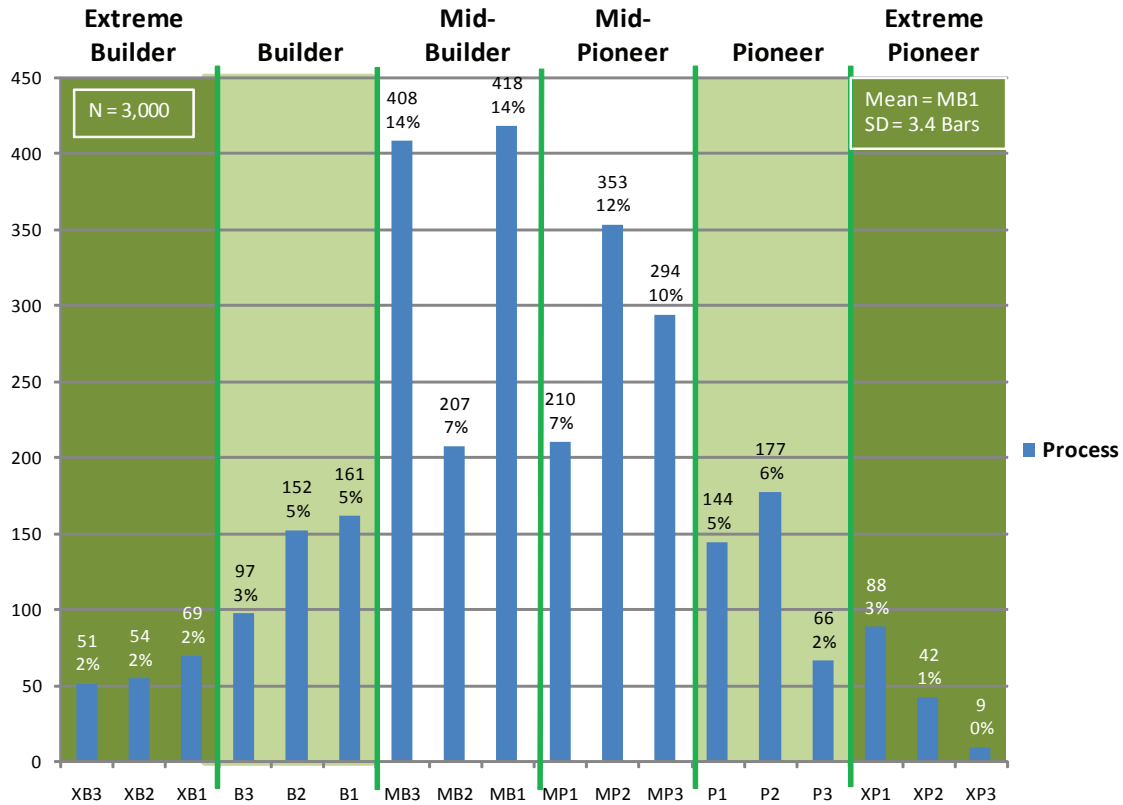
Ideation



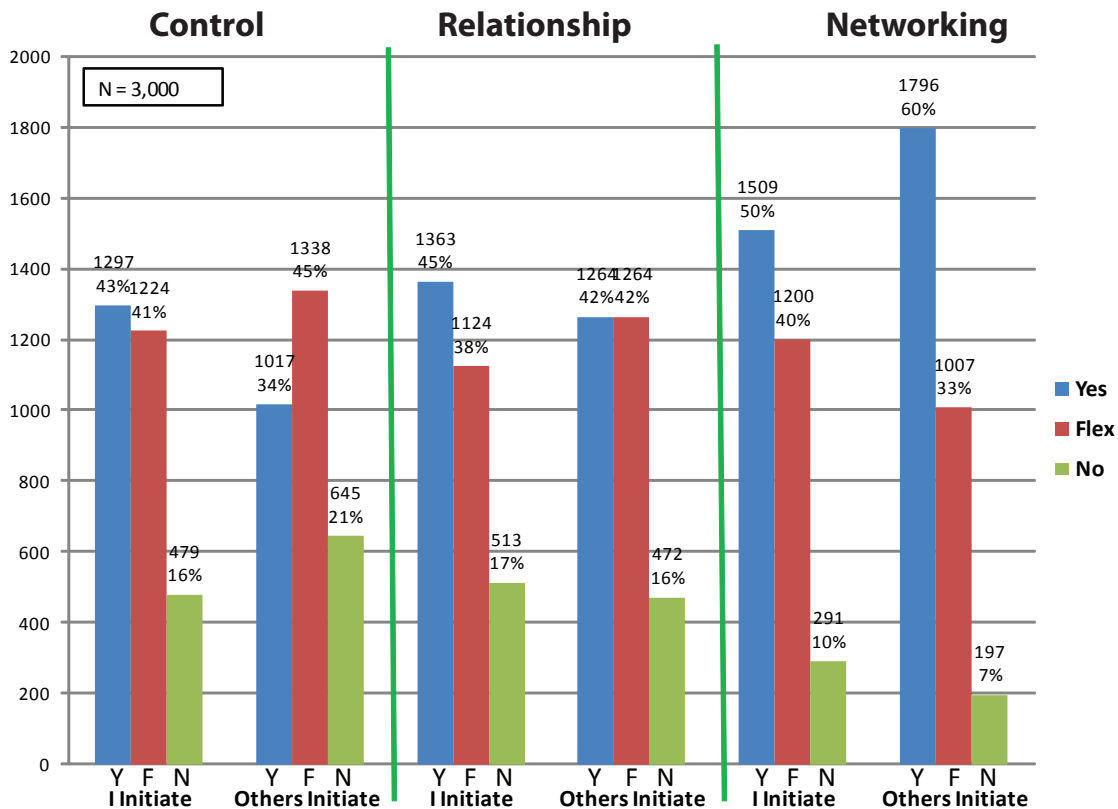
Risk



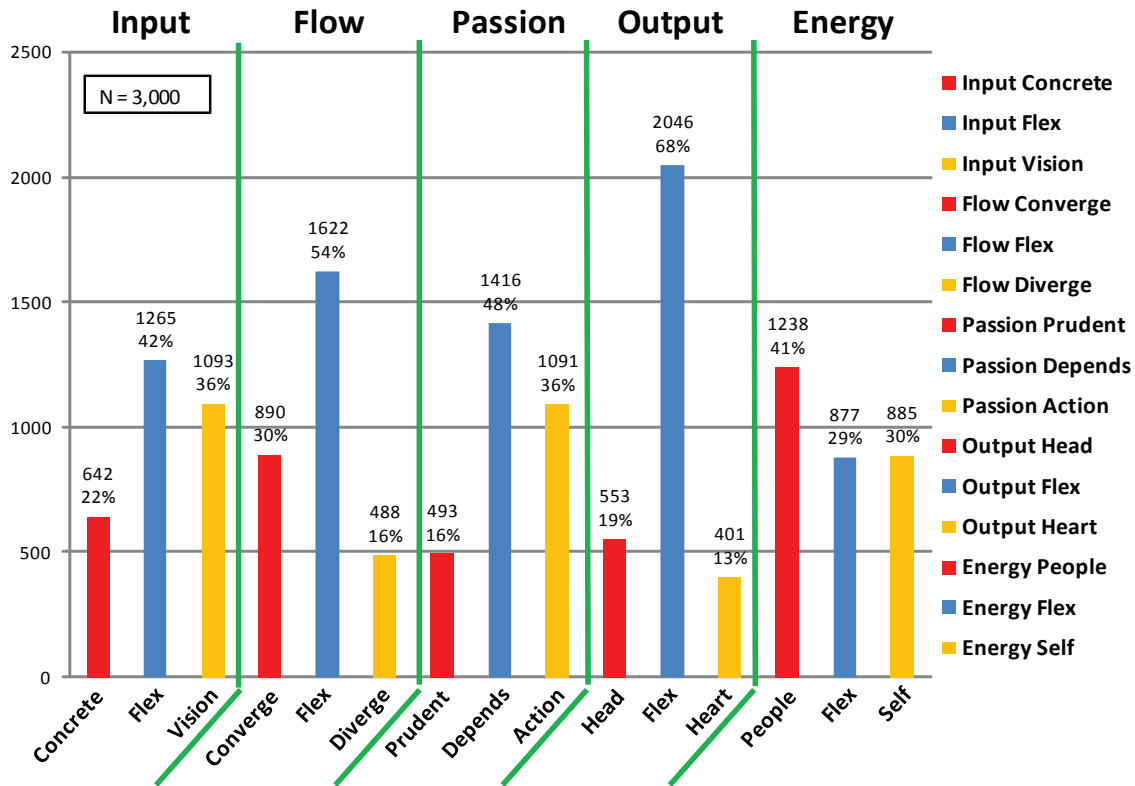
Process



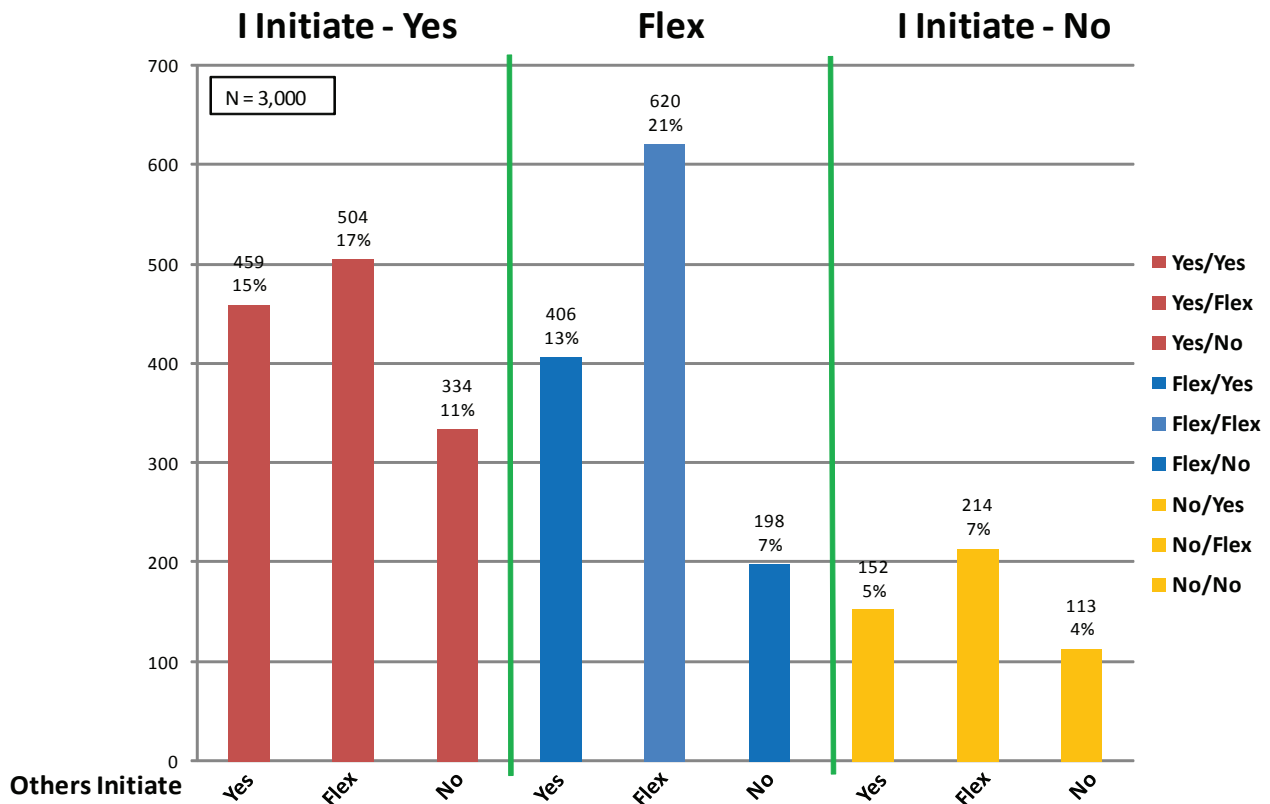
Affective



Cognitive/Conative



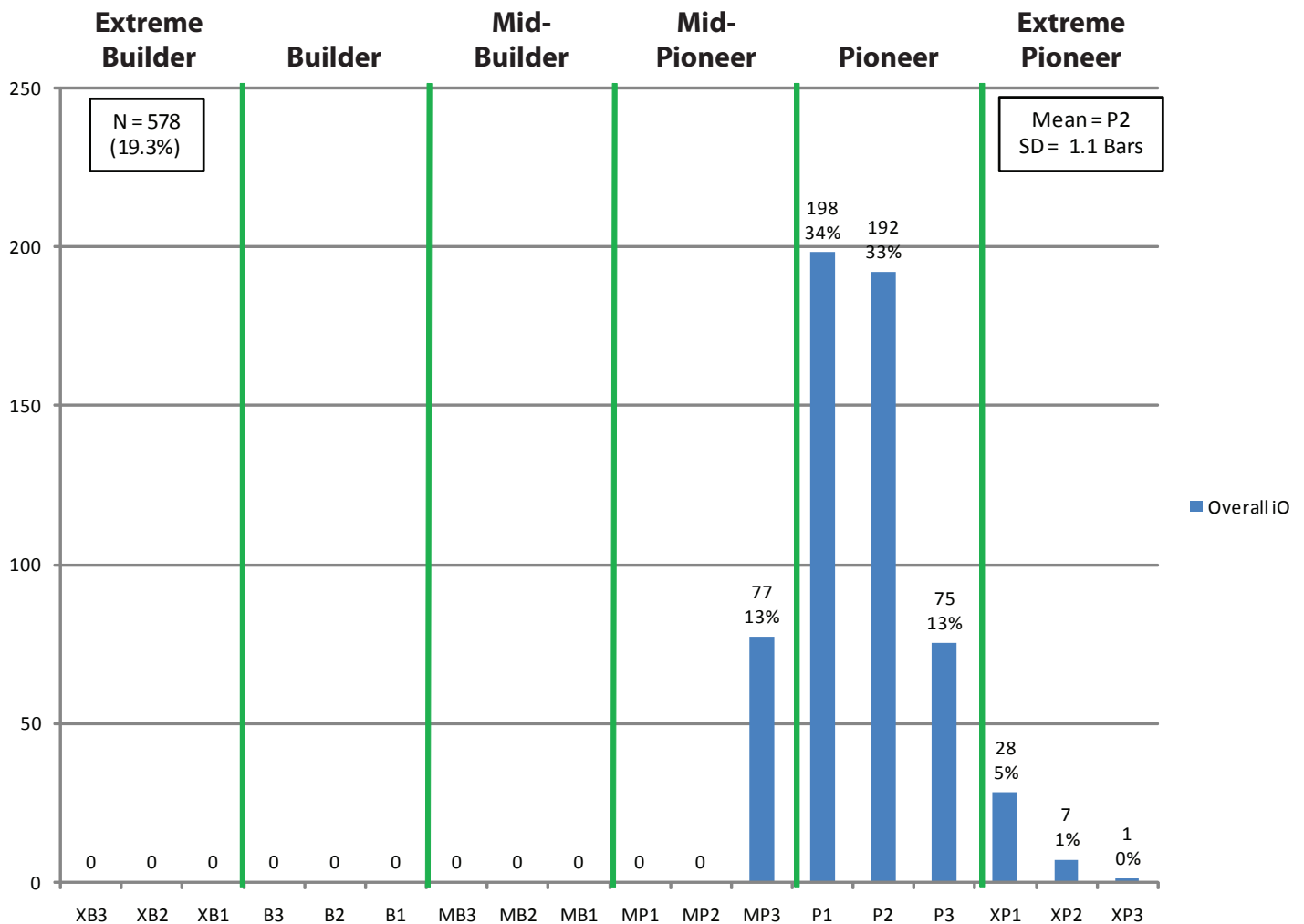
Control



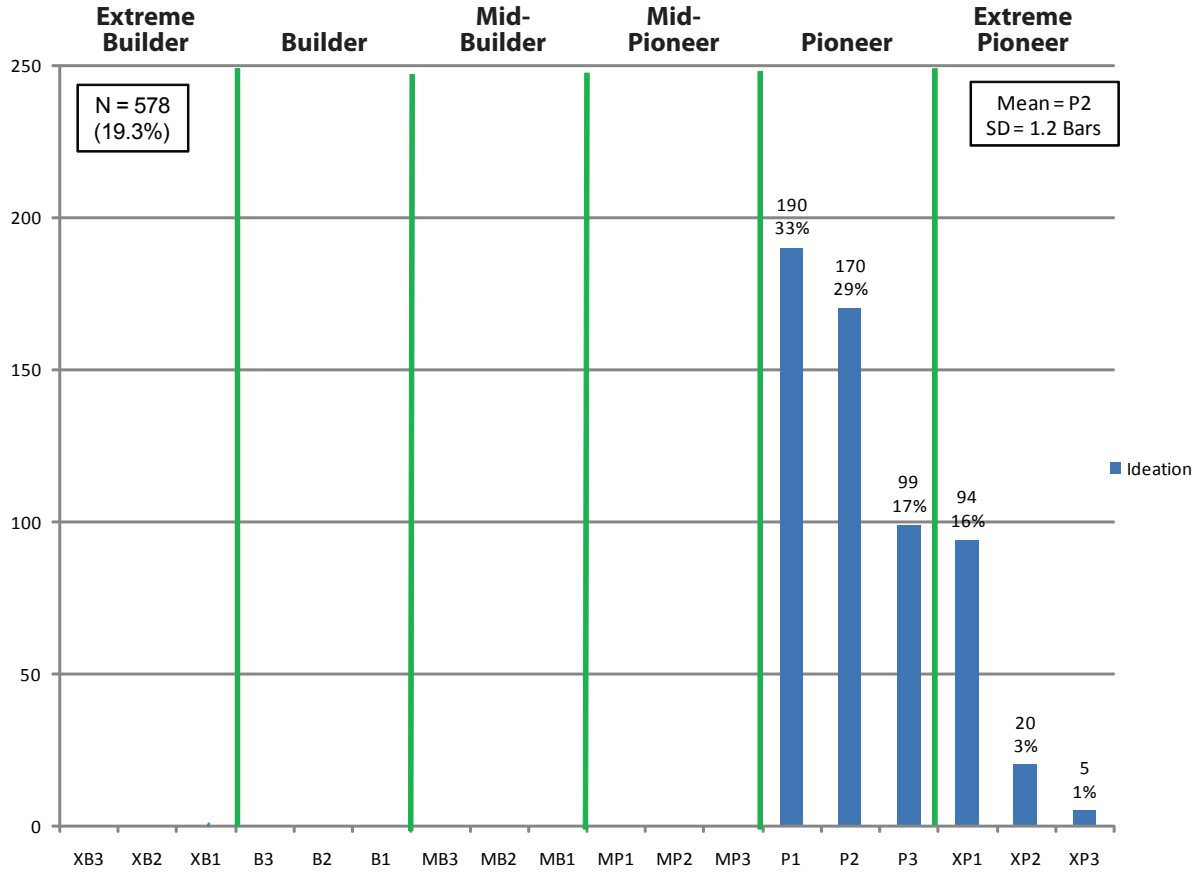
Pingger™ Charts

We define a Pingger as someone who scores P1 or higher in both Ideation and Risk. They are notable for their Pioneering Innovation capacity, and tend to be leaders and executives in organizations. Pinggers tend to be prolific idea generators, are often entrepreneurs who take a lot of risk and may not fit easily in an organization because of their resistance to structure. However, they are absolutely the kind of people needed on a team tasked with breakthrough innovation. Knowing who they are, and helping them connect with other Pinggers, particularly high-functioning ones, can drive an organization's capacity for innovation exponentially.

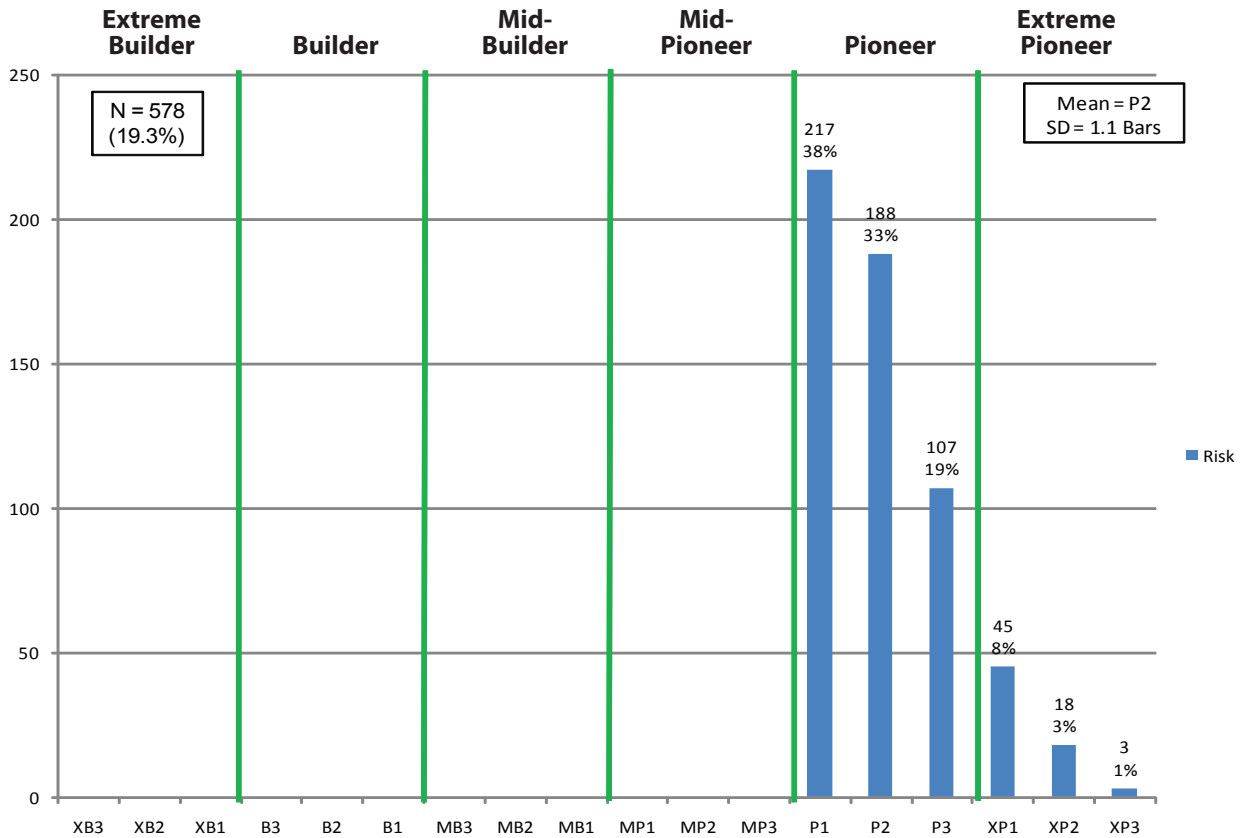
Pingger™s Overall iO™



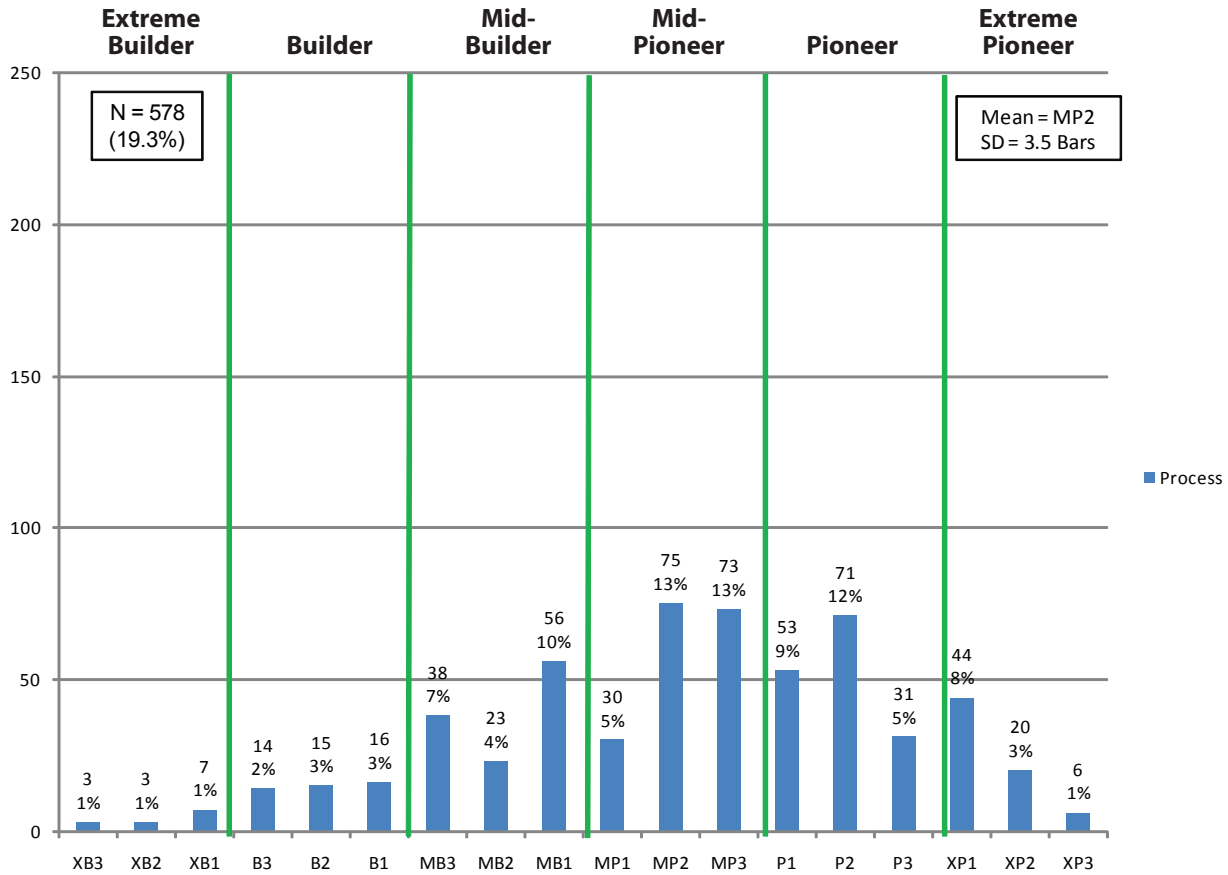
Pingger™'s Ideation



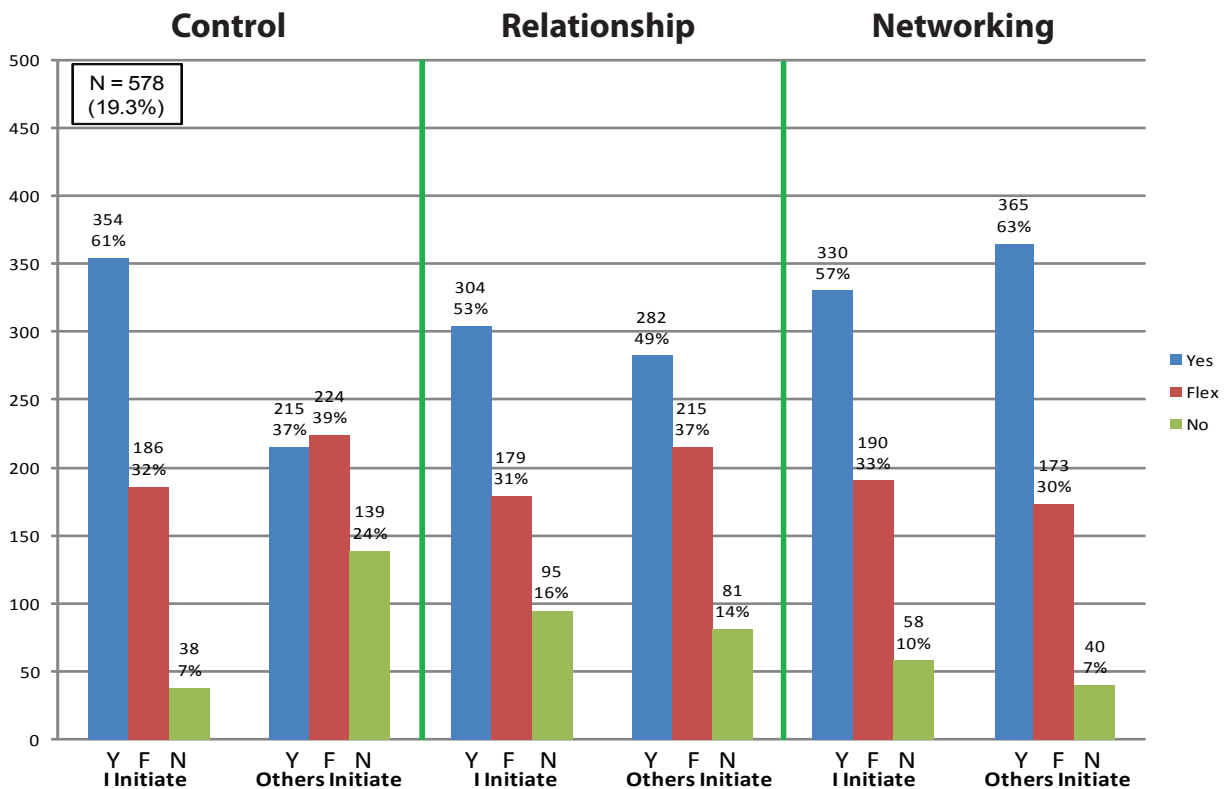
Pingger™'s Risk

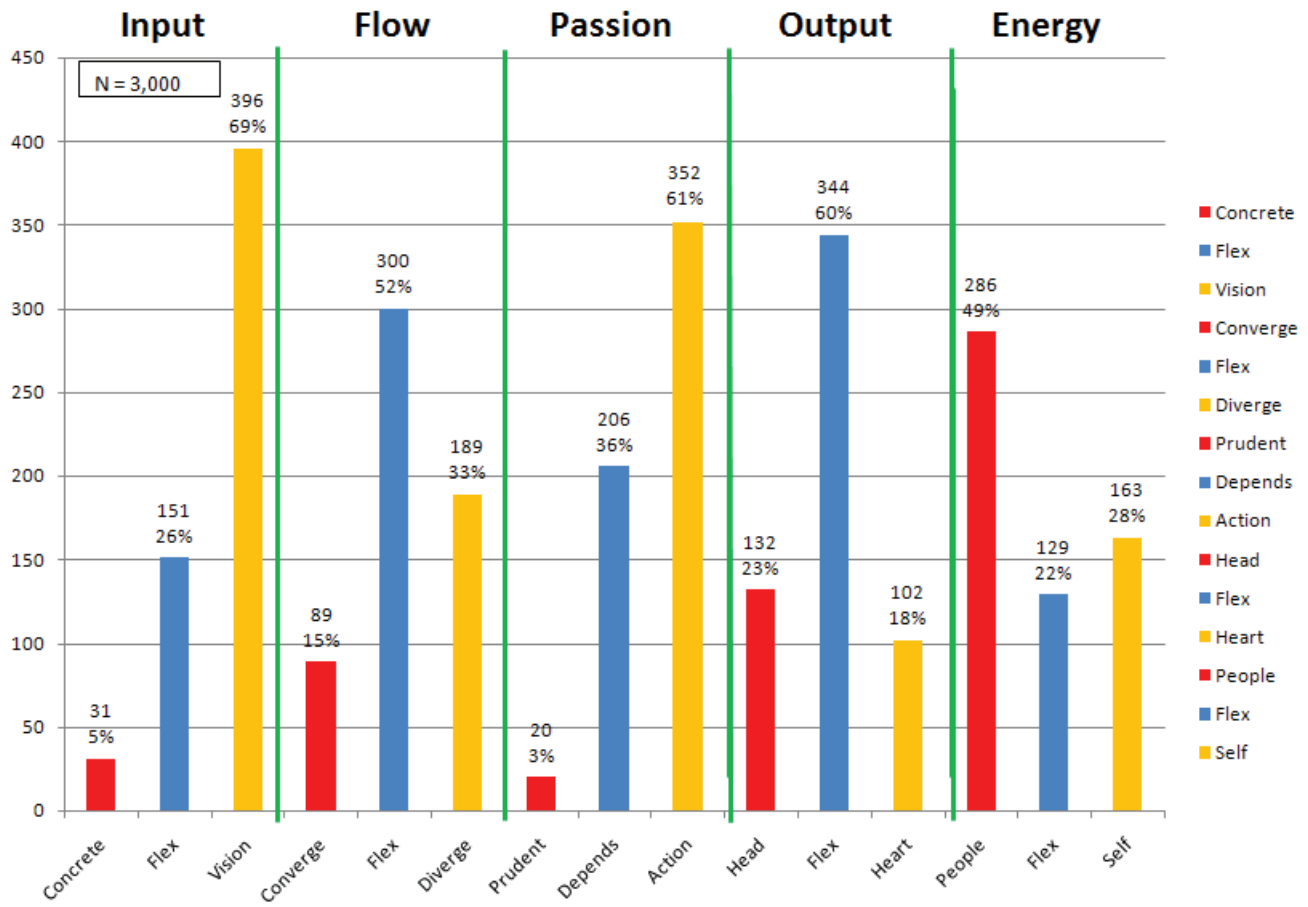


Pinger™'s Process

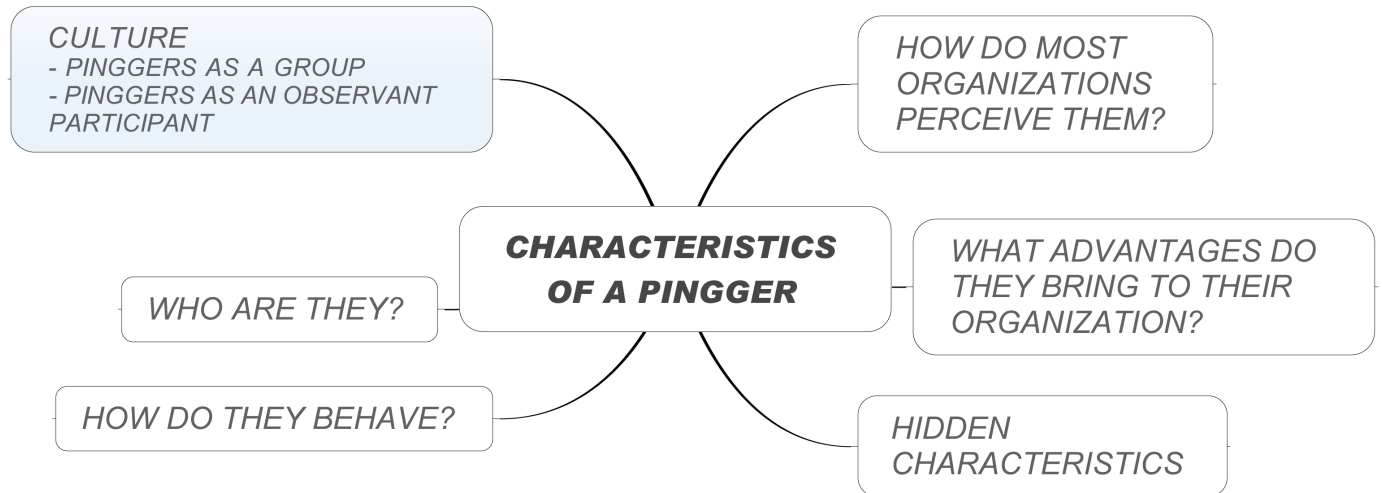


Pinger™'s Affective

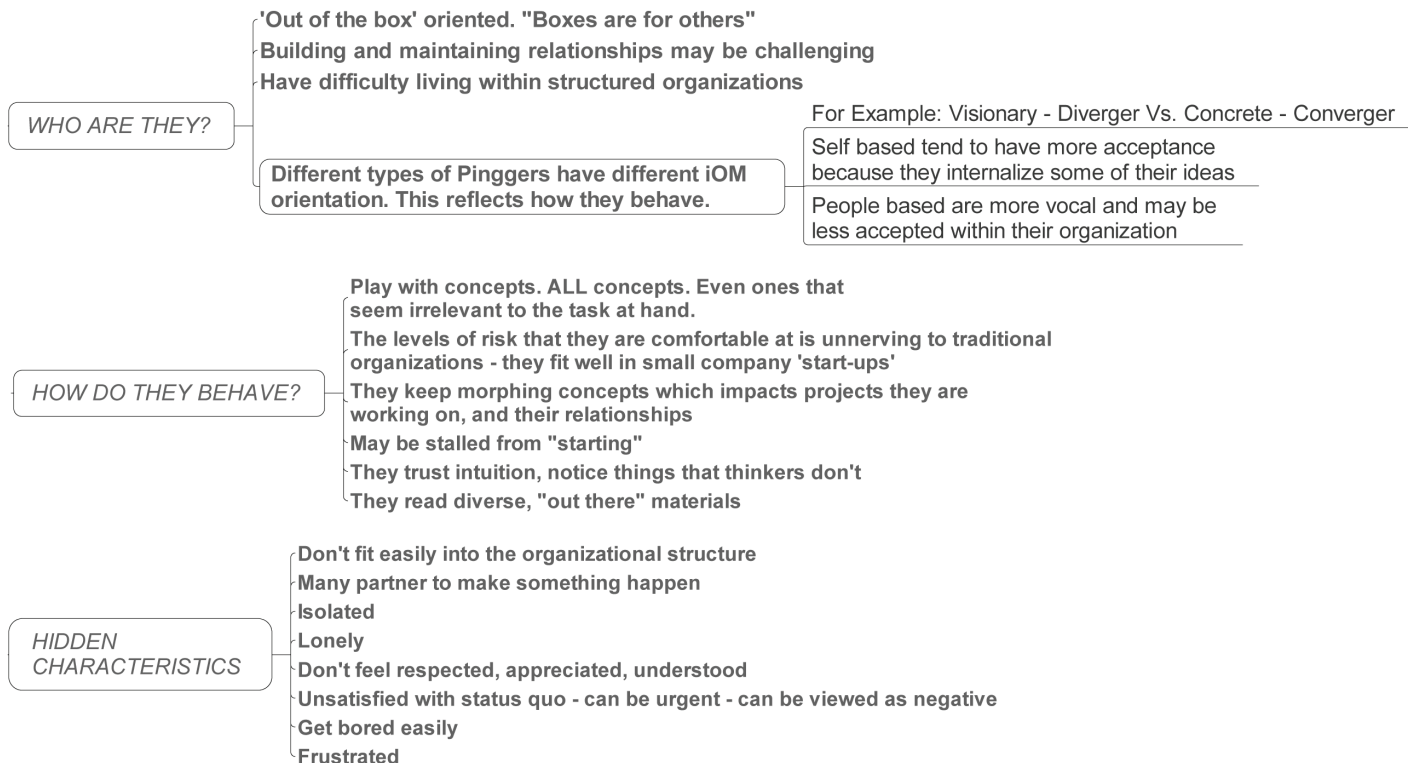




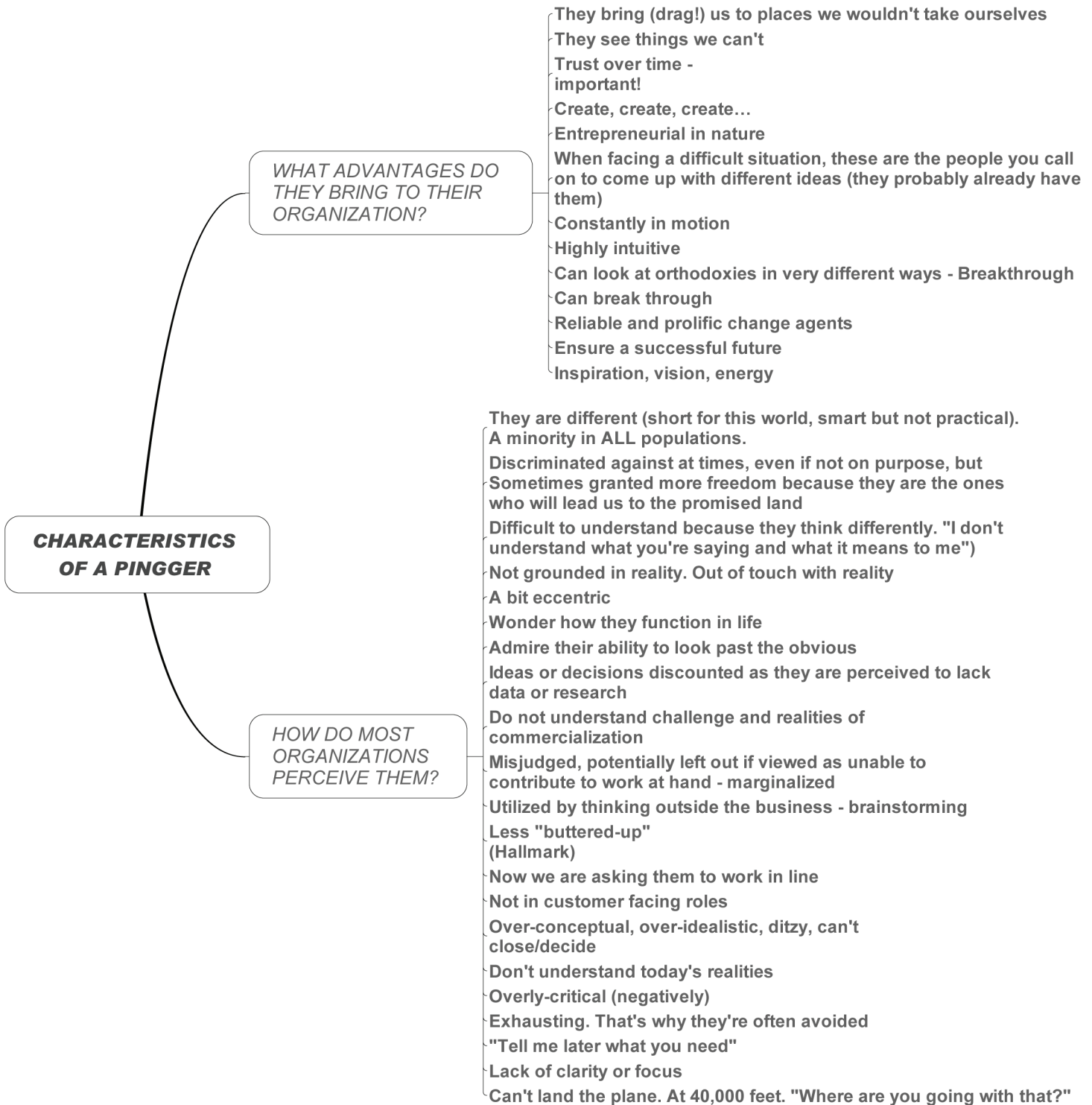
Characteristics of a Pingger™ - Overview



Characteristics of a Pingger™ - Personal View



Characteristics of a Pingger™ - Organizational View



Pingger™ Team Dynamics

	Orientation	%	Typical Behavior
Control	Yes/Yes	22%	Our Way
	No/No	1%	No Way
	Yes/No	18%	My Way
	No/Yes	3%	Your Way
Relationship	Yes/Yes	38%	Let's get close
	No/No	2%	Let's Not
	Yes/No	3%	If it suits my purpose
	No/Yes	1%	If it suits your purpose
Networking	Yes/Yes	41%	Let's stay connected
	No/No	2%	Let's not
	Yes/No	2%	If it suits my need
	No/Yes	4%	If it suits your purpose

Total vs Pingger™ Team Dynamics

	Orientation	Total	Ping	Typical Behavior
Control	Yes/Yes	15%	22%	Our Way
	No/No	4%	1%	No Way
	Yes/No	11%	18%	My Way
	No/Yes	5%	3%	Your Way
Relationship	Yes/Yes	31%	38%	Let's get close
	No/No	8%	2%	Let's Not
	Yes/No	2%	3%	If it suits my purpose
	No/Yes	2%	1%	If it suits your purpose
Networking	Yes/Yes	36%	41%	Let's stay connected
	No/No	3%	2%	Let's not
	Yes/No	2%	2%	If it suits my need
	No/Yes	4%	4%	If it suits your purpose

Part 5 **Obtaining Buy-In for Innovation in an Organization**

Identifying Conflicts

There is great power in asking questions.

A yes answer to some or all of the following questions may indicate a conflict involving iO™ and iOM™ differences, and indicate that further exploration around innovation traits – and in particular – using the ISPI™ could be helpful to resolve the conflict so people can get down to the task at hand.

Ideation Orientation

- Are suggestions being dismissed casually without serious consideration?
- Does one party continue to explore new paths after the other has settled on an already stated path?
- Is there an overflow of “irrelevant” or “redundant” ideas?
- Is one party anxious to move on?
- Is there a loss of mental connections or agreements - the parties just don't align with each other?

Risk Orientation

- Are stated or implied company procedures, regulations, and norms a source of disagreement?
- Are some people saying that others are being too conservative or conversely, that others are taking on too much risk?
- Is progress being stalled due to an insistence on, or disregard for, following rules?
- Is there an insistence on unanimity or consensus from one or more party?
- Has trust been eroded due to disagreements over organizational procedures or norms?

Process Orientation

- Do arguments arise from the process of doing rather than from the stated end goal?
- Is there a sense of being bogged down in details when overall aims have not been determined?
- Are there disagreements on the length of the entire process?
- Are there disagreements on the practicality of implementing the solution?
- Are questions of what systems or structures are in place sources of conflict?
- Are there complaints that it's taking too long to get something done?

Control Orientation

- Are some people attempting to take control of situations and others resisting them?
- Conversely, does no one seem to be taking control because they're waiting to be given direction by others before they will act so nothing's getting done?

Relationship Orientation

- Do some people need to be in a close relationship with other people in order to have the trust necessary to take risks?
- Conversely, do some people seem aloof causing others to be more cautious about taking risks when interacting with them?

Identifying Conflicts

Network Orientation

- Do some people seem reserved to others, which may be causing others to question their motivation and/or have difficulties trusting them?
- Conversely, do some people seem to be highly involved with so many people that it leads others to question their real motivation and wonder if they are on an ego trip and/or just need to be the center of attention?

Input Orientation

- Do some people want and need the facts while others seem to just ignore the facts?
- Conversely, do some people think that looking for the big picture is the more important reality to attend to while details and facts can seem unimportant or even misleading?

Flow Orientation

- Do some people relish the opportunity to engage in divergent thinking and seem comfortable with open-ended processes?
- Conversely, do some people rush to closure and avoid any opportunity to look for other ideas and possibilities?

Passion Orientation

- Do some people leap into action before others are ready to commit and/or agree on a path forward?
- Conversely, are some people overly cautious and want to make sure that every "i" is dotted and every "t" is crossed before they will take action?

Output Orientation

- Do some people look at just the "logical" facts when making decisions, and only look at how those decisions will affect people as a secondary concern at best?
- Conversely, are some people so concerned about the effect decisions will have on people or about violating their own internal value system that they will sometimes ignore the facts and the external reality that underlies the situation?

Energy Orientation

- Are some people so energized by being with people that they find they need to talk everything through out loud so they can even think? They need to brainstorm everything?
- Conversely, do some people need to be alone to be re-energized so that at times it may seem like they need too much time to "process" everything? They always seem to need to "sleep on everything"?

Why Organizations Care

At the risk of stating (or restating) the obvious, the business world today is a competitive place. It is easy for employees in an organization to get demotivated by the many challenges of the world we live in today.

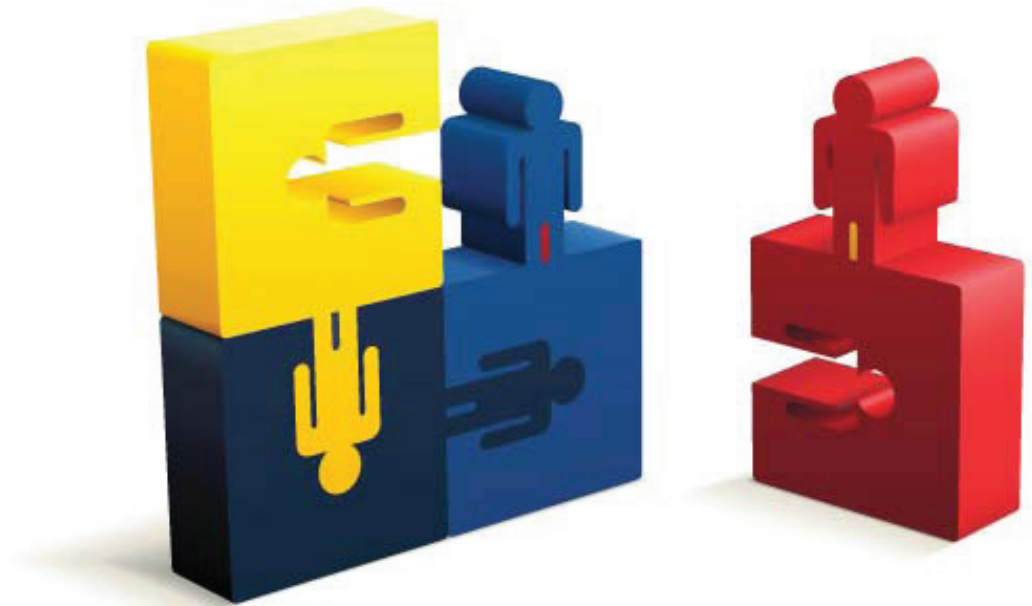
According to Albert Page of the University of Chicago, corporations who are leaders in an industry typically have the largest percentage of their sales from products introduced in the last five years -- new products that have come from new ideas which come from innovators... many of whom are seen as pesky at best, suspect or even dangerous at worst.

The ISPI™, then, is highly useful for making informed hiring decisions as to the type of employees it would be valuable to have on a given team, as well as in identifying the type of innovation that team is being asked to provide, finding the language that can help others in a large organization understand the nature of innovation, as well as the role and impact it can have in helping a company stay in the forefront of their industry.

To put this in terms of the distinctions made in earlier sections about the differences between Builders and Pioneers, innovation leaders (whether internal or external) tend to be Pioneering. These Pioneers are the ones that tend to bring in systems from the outside and learn about the overall innovation spectrum. This allows them to better utilize all people regardless of where they are on the spectrum. The effective ones will locate Builders to be heavy participants in certain projects or join in the proper sequence during an implementation. They have learned that Builders prefer to and have learned how to use/perform things so effectively from continuous experience that ideas around how to grow “incrementally” become very common. These incremental ideas may not shift a paradigm but they can save a lot of time and money – money that could be used to fund more breakthrough projects.

However, also in today’s market where everyone is asking for “breakthrough” or “disruptive” innovation, one must realize teams are selected based on the type of innovation desired. If the desired innovation is “breakthrough” there will naturally be an initial need for Pioneers and Pingers when selecting teams for this purpose. The Connectors/Mid-Range people help to expand and translate new concepts into workable action plans and the Builders either help to implement the new concept into an existing system with the intention of improving the system or help to identify areas where it can stand alone. The Builders will also continuously align the new concept into the organizational culture. So at times we could go into an organization and the leader only wants to identify Pingers for example once it is understood behaviorally what Pingers are likely to do, but we always focus first on what the desired outcomes are as they will determine who the players will be. So again, we should not think of it as Builders VS. Pioneers, instead it is Builders AND Pioneers being utilized in a process for the right purposes in the right sequence.

Part 6 Charts for Understanding Different Orientations



Dialogue Questions Based on iO™

	PRESENTING TO BUILDERS	PRESENTING TO PIONEERS
Do your homework!	Present only ideas that have been thoroughly examined, evaluated, analyzed, justified, and tested — and fit in with the existing paradigm.	Consider how your ideas fit into a global perspective. If you can't imagine it yourself, find someone who can.
Presentation styles	Accompany your verbal presentation with a written proposal in the style and format the organization prefers.	Operate from a general outline, talking in broad conceptual terms. A sequential flow may only bore Pioneers.
Organizational rules	Standards and policies should be included, as well as structure, culture, and mythology.	Company policy should be de-emphasized, as well as the structures that are needed to implement your ideas.
Emphasize	How the idea uses past experiences and successes	Describe what could be, not whether previous success is demonstrated or not.
Prepare	Be ready with solid, standard research and data (financial and technical).	Have novel spin-offs ready so when a Pioneer starts to spin, you can be prepared.
General approach	Don't surprise the Builder with extreme paradigm shifts. Talk enhancement rather than revolution.	Invite the Pioneer to add to your idea. Separate the core idea so you can move into new territory if necessary.
Don't be upset when they ...	Raise questions and objections — it's not directed at you but at the paradigm shift.	Add to your ideas—it's not that they dislike your idea, they are just shifting the paradigm.

	Builder	Pioneer
Ideation	Generates focused detailed ideas - evaluates them as they are generated	Generates what seems like an unlimited number of ideas - does not evaluate them at this stage
behavior	<p>Problem-solving methods will focus on the problem at hand and conclude with an appropriate solution</p> <p>Ideas may go deep into a solution</p> <p>Comes up with enough ideas to solve the problem and then moves on to the next problem</p>	<p>Problem-solving methods will seem to focus on new areas different than the original problem</p> <p>Comes up with ideas even after the problem is solved</p> <p>Likely to go on conversational tangents</p>
Risk	Very focused on attending to risk	Doesn't see risk
behavior	<p>Will express the perceived risk level of an idea and move to de-risk, to align with culture or paradigm.</p> <p>Wants to fit things into the current structure. Obeys the rules and enjoys the structure they provide.</p> <p>Comfortable with rules. Works within the given problem definition</p>	<p>Appears not to respect boundaries from culture or the current paradigm -will push back on people who try to restrict them</p> <p>May approach people with different concepts, spend time on projects unrelated to current problem, not "respect" boundaries</p> <p>A rebel. "Rules are constricting." Sees the boundaries as fuzzy and may look at things outside of the box</p>
Process	They approach things in an orderly way - Their desks and files are very organized	Does not live within systems very long - Their desks and files can appear to be very disorganized with piles of paper that are organized to them
behavior	<p>May be bothered when order is not present, a good person to "tune" systems and bring focus to concepts</p> <p>Does things linearly. Step by step. Can show/explain how they came to a solution</p> <p>Enjoys attention to detail. Can do things repeatedly</p> <p>Sets up systems and enjoys maintaining them. May seem obsessed with order</p>	<p>Will have difficulty maintaining systems -Will be an asset in envisioning unique approaches others can then maintain</p> <p>Knows how they came up with a solution but may have trouble explaining to others how they got there</p> <p>Have difficulty passing on their knowledge to others - "It's in my head."</p> <p>May appear disorganized to others</p> <p>Repeated attention to detail can be stressful for them</p>

	Yes	No
Control		
I Initiate	Always want to be in charge and make the decision	Always tends to avoid taking charge of new things
behavior	People based, usually the first to raise their hand in a group or get the “ball rolling” on a project	Tends to follow the lead of others
Others Initiate	Very open to others taking charge and are easily influenced by others	Tends to resist when others try to take charge
behavior	They tend to do more listening and will tend to ask questions for others to answer	May appear “difficult” to lead at times and is not easily influenced
Relationship		
I Initiate	Goes out and meet people specifically because they really want to	Tends to stay to themselves which is where they are most comfortable
behavior	Engages others in conversations about family, beliefs, values with comfort	Not comfortable with inquiring about personal areas of others life.
Others Initiate	When asked to go somewhere with someone, they are always open	Gives short answers to people who ask them personal questions
behavior	Enjoys dinner at a person’s home - for example Highly value conversations that go “deep”	Don’t seem very open when others ask questions about very personal affairs. Some things are just too private to them
Network		
I Initiate	Actively reaches out to include others in activities	Does not go out and organize an initial event for others to meet and connect
behavior	Approaches others in scenarios where they share common interests, such as work or hobbies	Prefers not to initiate with just anyone, despite possibly having common interests
Others Initiate	Enjoys being approached or invited out by others	Does not care if invited out or may prefer not to be
behavior	May have felt snubbed at a point when not included. May say: “Don’t forget about me when the time comes”	May seem comfortable when not invited to events and when there are opportunities to meet with others

	Concrete	Visionary
Input	Shares thoughts with their focus being on all the many details	Shares thoughts with their primary focus being on looking at the big picture first
behavior	May not grasp a concept unless it's written or broken down into parts. May be okay with knowing parts first	Might say "I can't see it" if they can't see how things fit in the larger picture
	Converge	Diverge
Flow	Very organized. Believes in being punctual	Very spontaneous, less organized. Sees timelines as flexible
behavior	Does not like things to be open-ended. May feel "unsettled" if things cannot be checked off a list. "Driven"	At times they seem to procrastinate. "Weights options" multiple times. Can leave things open-ended
	Prudent	Action
Passion	Very cautious and wants to test things before going forward	Can't wait to do it – "That's the best way to learn"
behavior	Takes times to consider outcomes before taking action. Prefers to make few errors when problem-solving	Can seem impulsive. Also seen as a "go-getter" who is always ready. May be more accepting of error as "part of the process"
	Head	Heart
Output	Concerned about the "facts". Very logical - less concerned with "emotions"	Concerned more about what's happening to people than the mission itself
behavior	May be described as aloof at times..by people of course; Can get very involved in design and efficiency aspects of a solution	Will pose questions from the perspective of "the people". Stands for causes many times
	Self	People
Energy	Doesn't want to go out with others - "needs sleep". Wants to think about solutions ALONE before agreeing	Wants to discuss problems with others as the best way to come up with a solution - people energize them
behavior	Will appear to be disengaged or fatigued after long or frequent interaction with others. Needs alone time	May be unsettled when can't share ideas. Prefers social time away from "work" to recharge and may appear to unload at times

Presenting an Idea to Different iOM™s

	CAUSE-DRIVER (Visionary/Heart)	ARCHITECT (Visionary/Head)
Do your Homework	<p>Be able to speak to the impact of the idea on health, welfare and relationships</p> <p>Be able to relate the new idea to the person and his or her employees</p>	<p>Be able to describe the principle behind, rationale for, and complexities of the idea</p> <p>Be prepared to explore other possibilities and applications for the idea</p>
Presentation style	<p>Speak to the person, not to his or her position in the organization</p> <p>Focus on harmony and on how others will respond</p>	<p>Use a written presentation; present the idea accurately and with no repetition</p> <p>Mix big picture with logic; move back and forth between vision and logic</p>
Emphasize	<p>The meaning</p> <p>How the idea:</p> <ul style="list-style-type: none"> • is the ethical solution • is for the common good of everyone • has a mission 	<p>The complexity</p> <p>How the idea:</p> <ul style="list-style-type: none"> • makes sense • is futuristic (addresses the needs of the future)
General approach	Personal and significant	Competent and logical
Don't be upset when they...	Insist on sensitivity to people and relationships	Question the rationale behind the idea
Avoid	Treating the person like just another cog in the organizational machine	Redundancy, small talk, and extraneous detail
"We are coming to YOU with the idea because..."	<p>We need you to build a team</p> <p>You provide the awareness of people's needs</p> <p>You will offer meaning to the idea</p>	<p>You can figure out how to make this work</p> <p>You provide the vision of the idea's potential</p> <p>You can develop the strategy to help promote the idea</p>
Present the idea as...	A mission	An innovation
Appeal to the person's sense of...	Meaning	Competency

Presenting an Idea to Different iOM™s

	PROTECTOR (Concrete/Converge)	TROUBLESHOOTER (Concrete/Diverge)
Do your Homework	<p>Get the facts about costs, procedures, personnel, and other quantitative issues</p> <p>Show how the idea is being developed in an orderly manner according to a defined procedure</p>	<p>Be able to describe the excitement inherent in developing the idea</p> <p>Relate how the urgency of the moment requires immediate consideration of the current crisis</p>
Presentation style	<p>Set up a formal meeting</p> <p>Present a detailed and documented report</p>	<p>Present the idea “spontaneously” (hallway meeting, etc.) but urgently</p> <p>Limit information to the large picture</p>
Emphasize	<p>The continuity</p> <p>How the idea:</p> <ul style="list-style-type: none"> • provides structure for the organization • is evolutionary and practical 	<p>The excitement</p> <p>How the idea:</p> <ul style="list-style-type: none"> • has impact • is an opportunity • provides active involvement
General approach	Detailed, thorough and direct	Pragmatic and spontaneous
Don't be upset when they...	Point out the possible pitfalls of developing the idea	Want to take over or change the plan to be more immediate
Avoid	Being late and not following rules and procedures	Focusing the person on constraints and limitations
“We are coming to YOU with the idea because...”	<p>You know the ropes</p> <p>You will do it right</p> <p>You provide structure and practicality</p>	<p>The project requires urgency</p> <p>We need your active involvement</p> <p>We need a quick thinker, one who can act on his or her feet</p>
Present the idea as...	An improvement	A crisis
Appeal to the person's sense of...	Duty	Excitement

Your ISPI™ Totem with Explanations

iO™

		XB	B	MB	MP	P	XP	
Total	I prefer to work on Incremental Changes							I prefer to work on Breakthrough Changes
Ideation	I prefer to make existing things "better"							I prefer to design new things and/or do things "differently"
Risk	I prefer to work within the system and minimize risk							I prefer to challenge the system and take risks
Process	I prefer to work within established processes and am good at details							I prefer to develop my own processes and work with details for short bursts of time only.

iOM™

		No	Flex	Yes	
Control	<i>I Initiate</i> I prefer to have no control over other people				I prefer to be in control of projects and people
	<i>Others Initiate</i> I prefer to be in control of my own activities				I prefer to have others provide oversight of my activities
Relationship	<i>I Initiate</i> I have no interest in getting to know others				I want to reach out to get to know other people
	<i>Others Initiate</i> I want to be left alone				I want others to reach out to get to know me
Networking	<i>I Initiate</i> I don't tend to include or invite others to be part of my activities				I am always reaching out to include and invite others to be part of my activities
	<i>Others Initiate</i> I don't really care if others invite or include me in their activities				I want others to invite and include me in their activities

Input	I begin by looking for the details and the facts	Concrete	Flex	Visionary	I begin by stepping back and looking at the big picture
Flow	I prefer to focus on being effective and efficient	Converge	Flex	Diverge	I prefer to play with many options and resist closure
Passion	I prefer to be more prudent and am slower to take action	Prudent	Depends	Action	I prefer to take quick action and others may see me as impulsive at times
Output	When making a decision, my first concern is the facts	Head	Flex	Heart	When making a decision, my first concern is people
Energy	I prefer to be alone to recharge and to process problems by myself	Self	Flex	People	I prefer to be with others to recharge and when solving problems