

The Forrester Wave™: Innovation Management Solutions, Q2 2016

The 15 Innovation Management Solutions Providers That Matter Most And How They Stack Up

by Dan Bieler
April 12, 2016

Why Read This Report

This evaluation of innovation management solutions providers analyzes 15 vendors: Brightidea, CogniStreamer, Hype Innovation, IdeaScale, Imaginatik, inno360, InnoCentive, innosabi, InnovationCast, Kindling, KPMG Innovation Factory, Nosco, Planbox, Qmarkets, and Spigit. We researched, analyzed, and scored them against a set of 26 criteria. This Forrester Wave helps CIOs and other decision-makers identify the most appropriate innovation management solution for their organization by assessing each solution's strengths and weaknesses.

Key Takeaways

Imaginatik And Spigit Lead The Pack

Forrester's research highlights a market in which Imaginatik and Spigit lead the pack. Qmarkets, Planbox, and Hype Innovation offer competitive alternatives. InnoCentive offers fewer full-range features but maintains the strongest innovation challenges ecosystem.

Companies Are Looking For Ease Of Use And Idea-Selection Support

The innovation management solution market is growing because more companies are looking to these solutions as a way to address the business priority of innovation. Innovation management solutions are becoming a part of their innovation tool box.

Innovation Tools And Consulting Services Are Key Differentiators

As enterprise collaboration platforms become commoditized, improved innovation process consulting and integration capabilities will determine which innovation management solutions vendors will lead in the future.

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The 15 Innovation Management Solutions Providers That Matter Most And How They Stack Up



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April 12, 2016

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Forrester conducted vendor briefings and product evaluations and surveyed and interviewed customer references in December 2015 and January 2016 for 15 vendor companies: Brightidea, CogniStreamer, Hype Innovation, IdeaScale, Imaginatik, inno360, InnoCentive, innosabi, InnovationCast, Kindling, KPMG Innovation Factory, Nosco, Planbox, Qmarkets, and Spigit.

Related Research Documents

- [The Forrester Wave™: Innovation Management Tools, Q3 2013](#)
- [Thrive With Sustained Innovation In The Age Of The Customer](#)
- [Understanding The Diverse Innovation Tools And Services Ecosystem](#)

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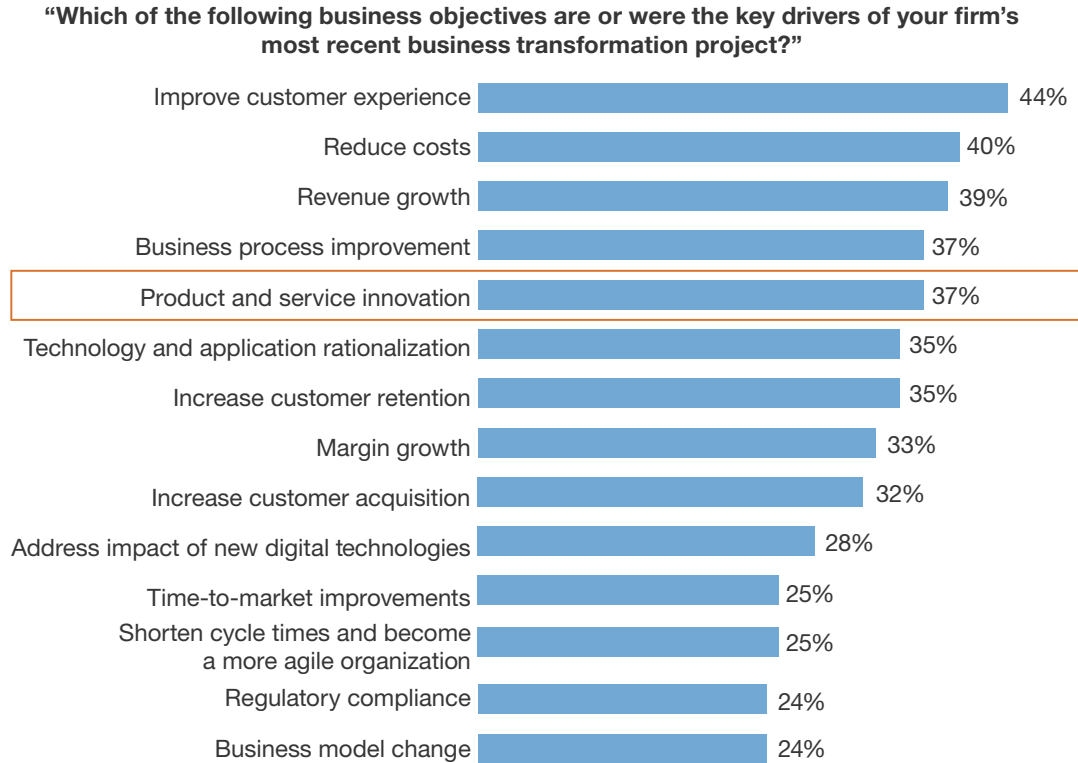
Top Innovation Management Solutions Create A Culture Of Innovation

When we asked global services decision-makers about their major business objectives, 37% claimed that product and service innovation is central to their business transformation (see Figure 1). Yet, there is a wide spectrum of innovation initiatives, including market validation, co-creation, innovation exploration, incremental innovation, technology-push disruptive innovation, market-pull disruptive innovation, and new business modelling. Innovation management solutions aim to support these different aspects of innovation. But CIOs and other decision-makers must remember that:

- › **Innovation management solutions themselves do not change your innovation culture.** A management innovation tool alone will never transform the innovation capabilities of your business. You need an innovation management *solution*, because without operational changes and an open working culture no agile innovation is possible in the age of the customer. Innovation culture must cross organizational structures and promote multidisciplinary collaboration. For instance, many companies talk about their intention to fail and learn fast, but very few reflect this approach in their business processes. If the innovation management solution structure simply mirrors the operational set-up of the business, innovation participants will feel constrained by the existing decision and reporting structure.¹
- › **Innovation management solutions are part of a continuum of collaboration tools.** Many businesses turn to innovation management solutions because innovation initiatives based on communication and collaboration tools like Google for Work, Jive, Slack, or Quip have clear limits for driving innovation. For instance, Jive supports ongoing innovation conversation, but it does not offer the features to support idea management, let alone innovation consulting (see Figure 2).
- › **The innovation management solution marketplace remains highly fragmented.** The innovation management market is growing, but at a market size of approximately \$150 to \$200 million, it remains very small when compared with other software segments. Spigit is the largest vendor of innovation management solutions, but the market is characterized by a very long tail of very small vendors. No innovation management solution vendors we evaluated had a strong vertical focus, although many of them bring country-insights as a result of their different geographic locations.
- › **Professional services are essential for successful innovation programs.** In many situations, innovation processes need to be built from scratch, innovation leadership structures need to be instilled, and new skills and innovation elements need to be developed. Professional services go beyond the pure software offering and may be offered directly by the vendor or via partnerships. Professional services stretch from support with onboarding and change management to sharing operational best practices.

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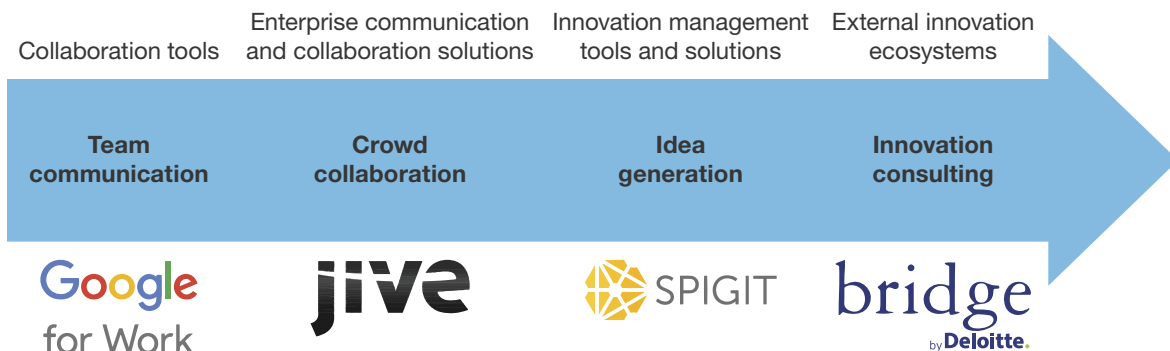
FIGURE 1 Innovation Efforts Are Central To Business Transformation Programs



Base: 2,017 global services decision-makers whose firms are currently undergoing a business transformation or have completed one in the past two years (multiple responses accepted)

Source: Forrester’s Global Business Technographics® Business And Technology Services Survey, 2015

FIGURE 2 Innovation Management Solutions Are Part Of A Continuum Of Collaboration Tools



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The Approach To Innovation Must Change To Defend Your Competitive Advantage

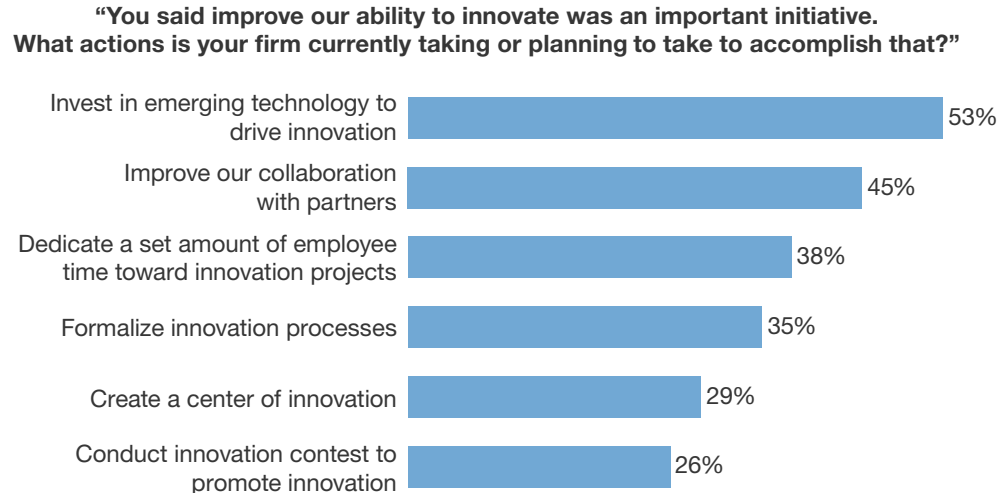
Businesses always have to innovate in order to keep ahead of their competitors. Among those businesses that say that their ability to innovate was an important initiative, 53% claim that they are investing in emerging technology to drive innovation (see Figure 3).

Old style innovation will be very tough to maintain. To exploit business value from digital technologies, innovation managers need to think in open ecosystems, open standards, open platforms, and open source software. Digital innovation equals service innovation, which in turn requires a willingness to experiment and engage in minimal-viable-product thinking. Several trends are changing innovation dynamics and forcing a break with the traditional internal, lengthy R&D approach:

- › **As customer demands evolve more quickly, innovation cycles are getting shorter.** Fast software innovation will “eat” slow hardware innovation given the ever greater role that software plays for today’s business value creation. An innovation management solution supports decision sessions and real-time voting and collaboration to quickly validate or gauge the interest of organizational priorities in short 30 to 60 minute sessions. Organizations need to be willing to fail fast, work iteratively on product and service improvements, run idea experiments based on soft-launches, and get feedback on innovation efforts via external feedback loops quickly.
- › **Open innovation is spreading.** Crowdsourcing innovation drives two distinct areas: ways to optimize operational efficiency and opportunities to drive new business. Stage-gate processes, which rely on facts and figures, are ill-suited for agile innovation scenarios. In open innovation scenarios, risks and uncertainty are part of the process. Stage-gate innovation is hampering innovation in a fast-moving market, as it is mainly designed for situations where you know what kind of product to develop and where risk has to be minimized.
- › **Ecosystems are playing a central role for innovation initiatives.** Most innovation crowdsourcing campaigns are still run internally without involvement of partners or customers. Open innovation is spreading to ecosystems. For instance, we find open innovation in the auto industry between companies like Toyota and Tesla for battery fuel cells.² However, innovation ecosystems never work based on asynchronous business models, where one company extracts more value from its partners or a customer than it is prepared to give back.

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FIGURE 3 Technology Is Playing A Central Role For Innovation Programs



Base: 6,344 global business and technology influencers and decision-makers whose firms are prioritizing improving their ability to innovate (multiple responses accepted)

Source: Forrester's Business Technographics® Global Priorities And Journey Survey, 2015

Successful Introduction Of Innovation Management Tools Requires Planning

Most customers we surveyed are fairly satisfied with management innovation solutions (see Figure 4). To improve user satisfaction, the CIO needs to plan the roll-out adequately, and:

- › **The CIO, as business enabler, must work closely with key innovation stakeholders.** Not every business has a clear innovation department that reports straight to the board. Innovation can sit in various departments like product development or research and has reporting lines to the heads of these departments. The CIO needs to collaborate with the innovation managers but also reach out to those business line managers to ascertain their requirements for, and eventually ensure the introduction of, technology-enabled innovation.
- › **Executive sponsorship of innovation initiatives is important.** Managers must be seen to be fully supportive of innovation initiatives. Incremental innovation is usually managed from inside an individual business unit, while transformational innovation is usually managed by the board. Test innovation management solution before final selection. Having a clear understanding of who is responsible for running innovation programs is a prerequisite. Part-time positions for innovation management were pointed out as sub-optimal by customers we spoke to.
- › **All stakeholders need to be aligned before the innovation solution is introduced.** The more specific you are about innovation management the better. Make sure the team responsible for innovation is aligned when reaching out to external innovation participants. Several customers we

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interviewed reported that they felt they had selected the wrong tool for their requirements and that it was difficult to change the tool once it was fully implemented.

- › **Metrics to measure the success of innovation initiatives are critical.** Although most vendors claim that they provide calculations for returns on the investments (ROIs), 91% of their customers told us that they are unable to generate a reliable ROI for their innovation management solution. KPIs should track innovation participation levels and the number of campaigns, innovation accounts, submitted ideas, comments per submitted idea, documents listed, opportunities listed, and the implementation ratio of submitted ideas. But CIOs also need to define the right KPIs together with business-line managers to track and attribute the business value that innovation generates. Such KPIs could include quality and customer experience improvements, additional tasks accomplished per employee, dollars saved, and sales growth.
- › **Resolve issues of idea ownership at the outset.** In customer discussions, we detected the risk in underestimating assumptions about idea ownership. Organizations have to decide at the outset whether the idea initiator should be the exclusive owner of intellectual property (IP) or whether IP ownership should be shared among various initiators and contributors and to what extent open innovation should allow everyone to join.

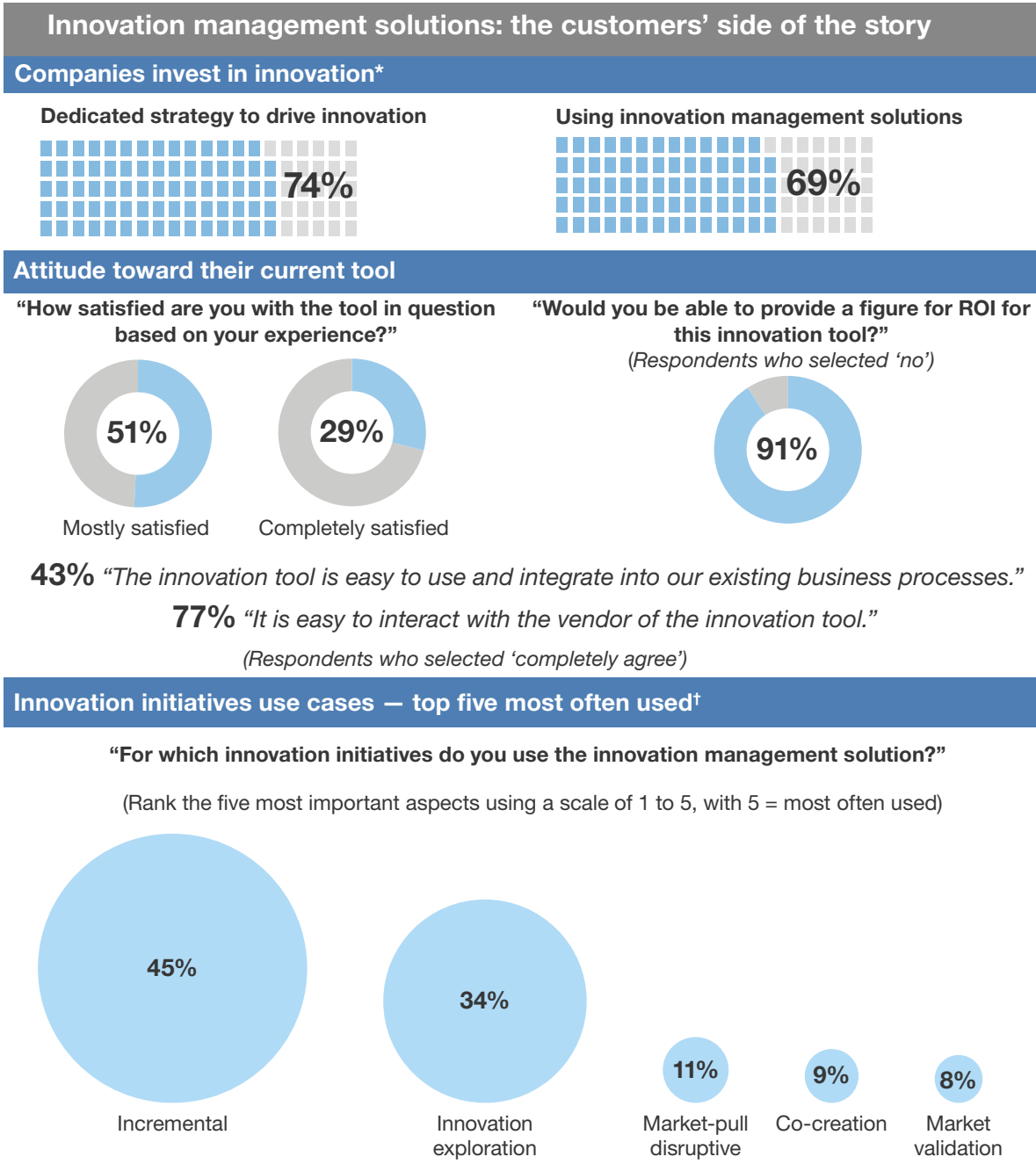
Innovation Management Solutions Have Clear Limitations That Require Attention

Once an innovation management solution is up and running, CIOs and other decision-makers can increase the positive impact of these solutions by:

- › **Combining online and physical worlds to achieve effective innovation.** For instance, a business might run an innovation contest using an innovation management solution. But this contest should be followed by a separate physical workshop to further discuss the best ideas. Businesses can also follow up innovation initiatives with hands-on projects like hackathons to maintain an innovation momentum.
- › **Supporting user experience with more than easy-to-use features.** Software offerings that are easy to use by employees or customers are important, as they increase user participation. Several users of easy-to-use innovation management solutions we spoke to also mentioned that as a result, they do not require any user training. Still, ongoing recognition of their contribution is instrumental for employees to stay involved in innovation initiatives. Employees must feel that their contribution truly is valued and matters to their organization. In discussions with customers, we were also told that setting targets for employees to generate ideas usually backfires and undermines creative thinking.
- › **Ensuring access to innovation consulting services.** Innovation consulting services go beyond providing practical advice, but they instead touch on high-level management consulting. Successful innovation efforts depend on setting a vision for innovation, developing an innovation strategy, and furthering a culture of innovation. Naturally, vendors readily share best practices with their customers. But few innovation management solution vendors can address wider business transformation requirements alone and need to work with outside consulting partners.

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FIGURE 4 Customers Have Mixed Feelings About Management Innovation Solutions



Base: 35 customers of the vendors evaluated
 Source: Forrester’s Q4 2015 Global Innovation Management Solutions Customer Reference Online Survey
 *Participants who selected the ‘over two years’ option.
 †‘Other’ option has been excluded from the analysis.

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The Innovation Management Solution Market Has Matured Since The Last Forrester Wave

The market for innovation management solutions has evolved in the three years since we published “The Forrester Wave™: Innovation Management Tools, Q3 2013”:

- › **Enterprise collaboration tools lay the groundwork for new innovation approaches.** Businesses are increasingly using enterprise social platforms like Jive, Chatter, Quip, or Slack to work in a more collaborative and innovative manner. Many features of such collaboration tools and social enterprise platforms are also found in innovation management solutions. This similarity in features and functions facilitates the uptake and use of innovation management solutions.
- › **Innovation management solutions have become more mainstream.** Many corporate innovation initiatives are embracing idea crowdsourcing, open innovation, design thinking initiatives, hackathons, innovation labs, 20 percent-time, and lean startup. We also see that dedicated innovation managers are emerging. But most businesses are challenged to effectively manage these diverse innovation initiatives, and CIOs must learn how to support optimal innovation.
- › **Patent recognition plays a bigger role for the economic return of innovation initiatives.** Companies are paying more attention to whether ideas can be turned into patents and whether these patents are worth the cost of investing in innovation management solutions. A realistic assessment of patent recognition matters even more in a fast-changing market, because the value of holding a patent for 20 years is less attractive if technological advances make patents irrelevant more quickly.
- › **Mergers and acquisitions continue in the innovation management solutions market.** For instance, in 2014, KPMG acquired the Dutch innovation software supplier Innovation Factory. And in 2015, Planbox merged with BrainBank Software. Today’s market remains fragmented and mostly populated by local players that primarily serve local subsidiaries of global companies. However, we expect the market to consolidate to global players. We predict mergers among the innovation management solution vendors and also acquisitions by larger management consulting firms, professional services providers, and digital agencies.

Innovation Management Solution Evaluation Overview

To assess the state of the innovation management solution market and see how the vendors stack up against each other, Forrester evaluated the strengths and weaknesses of innovation management solution vendors. After examining past research, user need assessments, and vendor and expert interviews, we developed a comprehensive set of evaluation criteria. We evaluated vendors against 26 criteria, which we grouped into three high-level buckets:

- › **Current offering.** Control structures of an innovation management solution include elements like measurement metrics, user access control, participation modalities, governance, visibility of, and voting on submitted content. We differentiate between front-end innovation, like idea management processes, and back-end underlying governance processes and structures. Front-end innovation

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tool features allow companies to gather, collaborate on, and track ideas, while back-end innovation features keep an organization's innovation program sustainable. We also evaluated technology aspects regarding security and big data offerings.

- › **Strategy.** Determining where and when to invest capital is related to the business value an innovation management solution delivers. The vendor's management team must bring the vision, skills, and experience to lead the firm to success, growth, and differentiation. Different pricing model options matter, especially when potential customers are new to innovation management solutions. Other aspects we evaluated were the vendors' road map as well as their approach to customer experience and customer support.
- › **Market presence.** Customers increasingly demonstrate a preference for integrated offerings that combine solutions holistically. We evaluated the market presence of the vendors by looking at the number of active customers, their turnover, the distribution of their client base across various verticals, and the geographic representation of the vendor. We also took into consideration the status of the vendors' cash flow situation.

Evaluated Vendors And Inclusion Criteria

Forrester included 15 vendors in the assessment: Brightidea, CogniStreamer, Hype Innovation, IdeaScale, Imaginatik, inno360, InnoCentive, innosabi, InnovationCast, Kindling, KPMG Innovation Factory, Nosco, Planbox, Qmarkets, and Spigit (see Figure 5). Each of these vendors has:

- › Defined product offerings that are designed to support the gathering, organizing, and vetting of innovative ideas from internal and external sources.
- › Defined product offerings that are designed to support the implementation of an innovation program at an enterprise.
- › Defined product offerings that are designed to support the ongoing governance and management of an innovation program at an enterprise.
- › Operated in the innovation management solution space at least since 2013.
- › Demonstrated continuous growth in employees, clients, and revenue between 2010 and 2015.
- › Employed at least 15 full-time staff in their last financial year.
- › Reported at least \$1.5 million in their last financial year.
- › Serves enterprise clients internationally and brings at least three reference customers.

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FIGURE 5 Evaluated Vendors: Product Innovation Management Solutions Information

Vendor name	Product	Product version
Brightidea	Brightidea	December 2015
CogniStreamer	CogniStreamer Innovation Portal	3.19
Hype Innovation	Hype Enterprise	8.9
IdeaScale	IdeaScale	December 2015
Imaginatik	Innovation Central	12.3
inno360	inno360	2.9.3
InnoCentive	Enterprise Platform for Innovation	December 2015
innosabi	innosabi crowd	Core V.330
InnovationCast	InnovationCast	5
Kindling	Kindling	3.53
KPMG Innovation Factory	PIT	4.35.3
Nosco	Nosco	3
Planbox	Planbox Innovate	Infinity ∞ 1.0 Clouded Sulphur
Qmarkets	Q-max	7.3
Spigit	Spigit	3.8

Innovation Management Solution Firms Are Still Evolving

The best innovation management solutions are hyper-adaptable, accessible, and user friendly. They keep all barriers to innovation as low as possible. When selecting the most appropriate innovation management solution vendor, the CIO should be aware that:

- › **Technology alone is rarely a major differentiator.** Ideation software by itself constitutes a lower margin and is limited value-add offering of the broader innovation management offering. The vision, strategy, and ability to generate business value represent the real aspects that CIOs should consider when selecting their innovation management solution. Businesses should weigh tool features' richness against the availability to get meaningful advisory or consulting support. We feel that most innovation management solution vendors are not yet strong in these areas.
- › **The vendors are very small compared with the large enterprise software providers.** The smallest of these vendors are very similar to, and often behave like, startup businesses, both in a negative and positive manner. For instance, they often lack clear processes, have software bugs,

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but offer agility. Moreover, due to their small size, these vendors are more exposed to internal financial uncertainties and external market turbulences than their larger cousins. These vendors' customers must be aware of these inherent risks when working with smaller vendors.

- › **There is limited differentiation based on features and functions.** Most innovation management solution vendors are good at delivering an attractive front-end experience for innovation management. Customer-facing features and functions are well developed for all vendors. Still, we feel that vendors overestimate the ease-of-use of their tools, in particular for system administrators and idea moderators. In the back-end of innovation management solutions, we see greater differences between the vendors.
- › **There is a big difference between innovation based on collaboration versus contests.** Decision-makers ought to differentiate between challenge-based innovation and general idea submission. In this context, a central question for innovation managers and CIOs is whether to rely on their own internal skills and experience ecosystems or whether to access external skills and experience ecosystems. Challenge-driven innovation tends to work better for specific problem solving tasks.
- › **Mobility is weak for most innovation management solutions vendors.** We believe the vendors in this Forrester Wave evaluation overestimate the attractiveness and maturity of their mobile offerings. We did not come across any cutting-edge mobile offerings that allow either employees to easily contribute or the moderator to easily manage innovation initiatives on the go via their smartphones. Customer feedback we received regarding the vendors' mobile offerings was fairly poor. Most vendors do not even have a native mobile app, although some have developed HTML5-based mobile websites. Those vendors that have native mobile apps have low downloads and get poor ratings. Moreover, most vendors use mobility only for marketing purposes.
- › **Idea selection remains an important area for improvement.** Most customers reported no shortage of ideas. Indeed, customers' innovation administrators we spoke to often struggle with too many overlapping ideas and the difficulty to select and synchronize these overlapping ideas. No customer reported complete satisfaction with idea-preselection features to bring similar ideas together early on in the ideation process. One customer said that idea-linking via some form of automated hashtag would help to pool thinking in certain areas where ideas overlap and thereby reduce idea preselection time.

Providers With A Broader Innovation Offering Lead

The vendors we evaluated are providing solid innovation management solutions. The evaluation results underline that vendors with integrated offerings that combine solutions holistically lead the Wave:

- › **Imaginatik and Spigit land as Leaders.** Imaginatik and Spigit are Leaders due to their breadth of both front-end innovation and idea management processes as well as back-end underlying governance processes and structures. But these vendors also scored higher for strategic vision and value creation. Other Leaders include Brightidea, CogniStreamer, Hype Innovation, IdeaScale, innosabi, KPMG Innovation Factory, Nosco, Planbox, and Qmarkets.

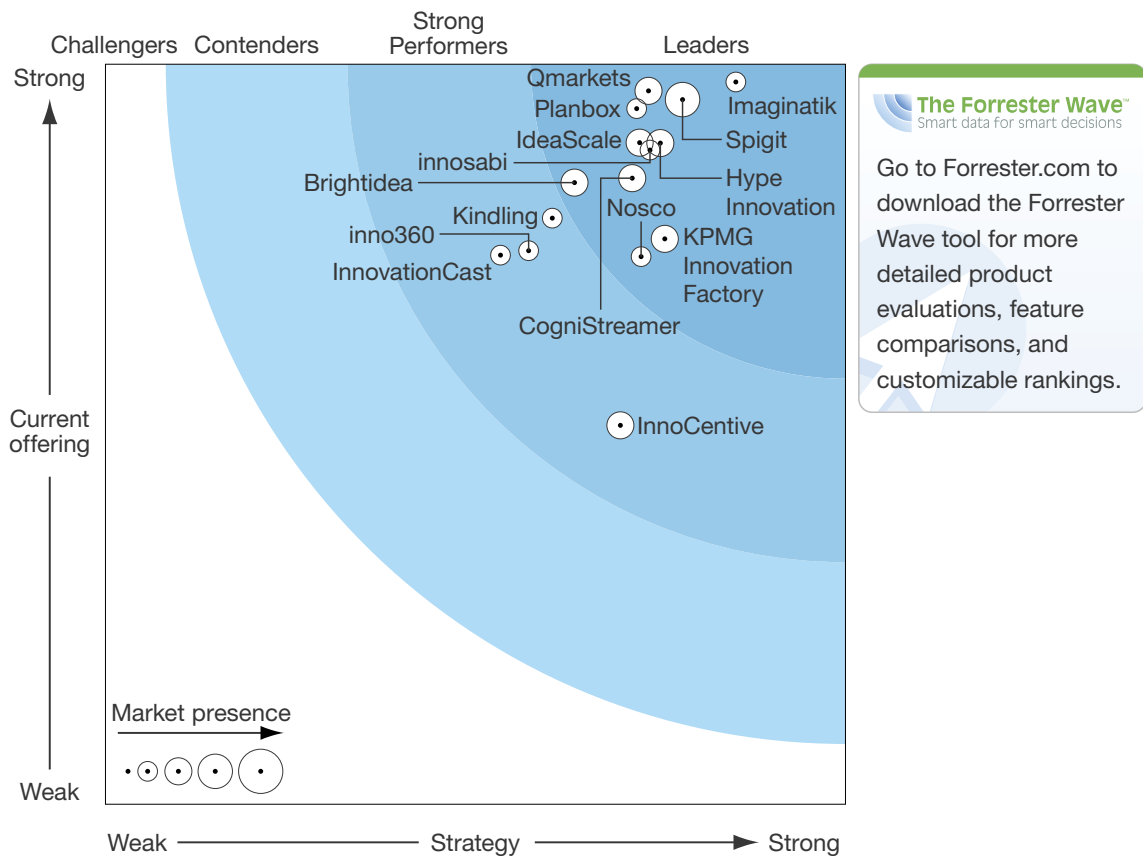
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- › **Kindling, inno360, InnovationCast, and InnoCentive are Strong Performers.** Although not ranked as Leaders due to their narrower offerings, these vendors have clear strengths. Kindling's offers software that people enjoy using. Inno360's integration with IBM Watson makes inno360 the innovation management vendor with direct access to the strongest big data capabilities. InnovationCast is pushing collaborative open innovation, not least with integrated social tools. And InnoCentive runs a very mature ecosystem for business, social, policy, scientific, and technical innovation challenges, both internally and externally.

Innovation addresses different requirements for every company. That's why Forrester's Wave methodology provides the opportunity for distinctive evaluation scenarios. This evaluation of the innovation management solutions market is intended to be a starting point only. The scores of our evaluation should only be one aspect of the selection process. We strongly recommend that every CIO conduct a proper due diligence of their short-listed vendors' cultural fit, latest software upgrades and problems, financial challenges, and potential for M&A instability. We encourage clients to view detailed product evaluations and adapt criteria weightings to fit their individual needs through the Forrester Wave Excel-based vendor comparison tool (see Figure 6).

FIGURE 6 The Forrester Wave™: Innovation Management Solutions, Q2 '16



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FIGURE 6 The Forrester Wave™: Innovation Management Solutions, Q2 '16 (Cont.)

	Forrester's Weighting	Brightidea	CogniStream	Hype Innovation	IdeaScale	Imaginatik	inno360	InnoCentive	innosabi	InnovationCast	Kindling	KPMG Innovation Factory	Nosco	Planbox	Qmarkets	Spigit
CURRENT OFFERING	50%	4.20	4.23	4.47	4.47	4.88	3.74	2.56	4.42	3.71	3.96	3.82	3.70	4.70	4.82	4.76
Front-end innovation and idea management processes	20%	4.52	5.00	5.00	5.00	4.88	3.46	4.26	4.84	4.72	4.88	5.00	4.62	5.00	5.00	5.00
Back-end underlying governance processes and structures	50%	4.44	4.20	4.78	4.46	4.81	3.43	2.25	4.59	4.04	4.32	3.66	3.72	4.58	4.82	4.70
Technology	30%	3.60	3.75	3.60	4.15	5.00	4.45	1.95	3.85	2.50	2.75	3.30	3.05	4.70	4.70	4.70
STRATEGY	50%	3.17	3.56	3.75	3.61	4.26	2.86	3.48	3.68	2.67	3.02	3.78	3.62	3.59	3.67	3.90
Executive vision and strategy	100%	3.17	3.56	3.75	3.61	4.26	2.86	3.48	3.68	2.67	3.02	3.78	3.62	3.59	3.67	3.90
MARKET PRESENCE	0%	2.24	2.12	2.48	2.40	1.90	1.56	2.26	1.92	1.70	1.68	2.86	1.86	1.84	2.64	3.20
Existing customer base	20%	1.90	0.80	1.90	1.90	0.80	0.40	1.60	0.80	0.80	0.80	1.60	0.80	0.40	1.90	1.90
B2C and B2B focus	20%	5.00	4.50	5.00	5.00	5.00	3.60	5.00	5.00	4.10	5.00	5.00	5.00	5.00	5.00	5.00
Revenues	20%	1.00	0.30	0.50	0.50	0.50	0.50	0.50	0.50	0.30	0.30	1.00	0.30	0.50	0.50	3.30
Geographic scope	20%	0.80	2.50	2.50	2.10	1.70	0.80	1.70	0.80	0.80	0.80	4.20	1.70	0.80	3.30	3.30
Cash flow	20%	2.50	2.50	2.50	2.50	1.50	2.50	2.50	2.50	2.50	1.50	2.50	1.50	2.50	2.50	2.50

All scores are based on a scale of 0 (weak) to 5 (strong), except for 'existing customer base' and 'revenues' that are based on a logarithmic scale and 'cash flow' that allocates different values to negative, positive, and break-even cash flows.

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Vendor Profiles

Leaders

- › **Imaginatik has the most comprehensive innovation management solution.** Imaginatik has dual headquarters in Boston and Fareham, UK. It delivers an enterprisewide portfolio of innovation services, strategies, and development solutions. Imaginatik's product goes beyond crowdsourced idea collection and idea development to support customers with a balanced corporate innovation program with complementary tools and systems to handle disruptive innovation activities as well as support features aimed at ongoing incremental improvement activities. Imaginatik develops software products, professional advisory, and consulting services, in addition to innovation project management capabilities. Imaginatik believes the role of big data as part of innovation initiatives will increase and offers such analytics tools. Imaginatik's future plans involve significant investments in next-generation analytics, algorithms, user experience, advisory consulting, training, and program management services.

Customers told us that Imaginatik offers strong analytical capabilities, making the idea review process easy and efficient. Moreover, customers emphasized Imaginatik's approach of listening to customer feedback to provide ongoing updates and features to the platform as big positives. On the downside, a customer told us that Imaginatik should do more to obtain better support with collating ideas into tangible actions.

- › **Spigit is a strong advocate for making innovation an integral part of doing business.** Based in San Francisco, Spigit, a subsidiary of Mindjet, has the largest revenue base of the vendors we looked at as part of this Forrester Wave evaluation. Spigit believes in fundamentally changing the way organizations and people work, making innovation "business-as-usual." Spigit believes that all organizations will need to have an innovation process that fits their culture and priorities. To enable this innovation-centric future, Spigit focuses on solutions that not only support ideation, but change customers' innovation processes themselves through templates and guidance. To boost cultural and organizational change, Spigit has partnered with innovation practices at Capgemini, PwC, CGI, IBM, Deloitte, Booz-Allen, and Cognizant. These partners integrate Spigit in their sales processes and solution offerings.

Customer feedback underlined the ease of dealing with Spigit as a real positive. Customers consider Spigit's willingness to invest and grow in new innovation projects to be very important. Customers indicated the following areas for improvement: an improved mobile-based version of the platform as well as the need for more real-time data sharing, like tracking who has done what in real-time to stimulate idea contributions. One customer would like to see support for reflecting his organization's operational structure on the Spigit platform so that gamification could be employed more at team-level.

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- › **Qmarkets delivers a highly scalable and customizable innovation solution.** Based in London, Qmarkets aims to provide robust, scalable, and tailored innovation solutions to meet changing customer, management, and employee expectations. Qmarkets places emphasis on audience engagement to create an environment for collaboration. For this purpose, Qmarkets encourages customers to configure innovation solutions to internal processes and requirements. Going forward, Qmarkets is prepared for the shift from front-end innovation to solutions that emphasize running efficient processes, content analysis, and visualization tools. Qmarkets develops collective intelligence software for open innovation, hackathon engagements, and municipal and citizen engagement. It also provides one-day workshops geared toward brainstorming solutions.

Customers view Qmarkets as being very reactive. A customer said the possibility of testing the Qmarkets tool in a sandbox environment with a few selective employees before rolling it out on a larger scale was helpful for launching their disruptive innovation initiatives. Qmarkets's cloud approach is mentioned by customers as very helpful to speed up innovation programs. Customers also mentioned positively that because of the intuitive nature of the tool, no training was required. However, the richness and flexibility in configuration and design of Qmarkets's solution can be sometimes overwhelming for some customers. Yet, the same customers point to co-creation sessions with Qmarkets as a great opportunity to discuss and solve any potential issues. A negative aspect for Qmarkets mentioned by a customer related to reporting capabilities and the introduction of changes to the tool that were implemented without prior notice, which caused disruption to the customer's innovation process.

- › **Planbox helps organizations to focus on continuous innovation and discovery.** Based in Montréal, Planbox believes that organizations need to exploit new ways of generating ideas with their employees, as well as through external crowdsourcing, co-creation, and open innovation and even through collaborating with competitors. In 2015, Planbox merged with BrainBank to strengthen the services capabilities. Planbox's solution empowers companies to experiment with new ideas, fail fast at reduced costs, and continuously improve products and services through direct feedback loops. Going forward, Planbox will include user-engagement analytics to drive diversity and inclusion efforts by factoring in employee resource groups (ERGs) such as ethnicity, age, gender, and education; drive gamification; and deliver behavior-driven user experiences. Planbox shares best practices with its customers and hosts a quarterly innovation analysis meeting.

A customer particularly emphasized the positive engagement with Planbox during the plan, build, and run phases. On the negative side, a customer mentioned some unattractive legacy portfolio elements that are remnants of the merger with BrainBank, which are gradually being phased out. Customers also mentioned a feature that automatically reduces the number of duplicate ideas in real-time by intelligently linking correlated idea suggestions as being in need of improvement.

- › **Hype Innovation delivers tailored features for front-end versus back-end.** Based in Bonn, Germany, Hype Innovation, a spin-off from Daimler, offers specifically designed features for front-end and back-end innovation management features. Front-end innovation tool features are highly

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scalable but do not offer a high degree of customization. Hype Innovation delivers out-of-the-box front-end capabilities with a focus on user experience, idea generation, collaboration, and user participation. Overall, Hype Innovation aims to simplify customization processes by using out-of-the-box processes and self-configuration wherever possible. Hype Innovation's back-end innovation tool features, meanwhile, are tailored to the decision process and the organizational structure of specific clients. Hype Innovation pushes additional value for its clients by embedding its features in enterprise social networks, for which it prepares a full integration capability with IBM Connections in 2016.

A customer highlighted the capabilities to manage the back-end project flow and the abilities to customize the platform to specific countries as being very helpful for their innovation management initiatives. On the downside, Hype Innovation's mixed willingness to listen to customer feedback and its slow reaction time to improve its features were mentioned as areas for improvement by a customer.

- › **Innosabi creates virtual spaces for interaction and idea generation.** Based in Munich, innosabi believes that the differentiation between internal idea management, innovation management, R&D, and external open innovation approaches will become increasingly obsolete. It states that data-generated by products, CRM tools, and social media will become more relevant in innovation management. The role of innovation managers will be increasingly supported by digital tools. Innosabi rebuilds the infrastructure for innovation in organizations to digitally transform their innovation management for data-driven decision-making to identify any potential for emerging demand and new markets, disruptive technologies, and valuable product or service-related knowledge. Going forward, innosabi will focus more on semantic analysis, big data analytics, and machine learning. Innosabi also recently introduced a software licensing model for enterprise clients.

A customer positively underlined the existence of dedicated support teams and the innosabi's fast response times to special requests. But the customer also pointed to the existence of small software bugs, which were fixed very quickly. Other areas for improvement relate to the need to optimize the preselection process of ideas that are very similar to another so that similar ideas can be worked on as one and reduce idea selection time and the reporting functionality for the content administrator.

- › **IdeaScale offers a freemium version for innovation management.** Based in Berkeley, California, IdeaScale believes in building a comprehensive network between organizations and individuals through to top-level collaboration and easy usability. The key strategic areas that IdeaScale will develop going forward include advanced reporting and analytics to provide actionable data in both online and offline contexts; group structures and project ownership; and success and ROI communication. IdeaScale offers action-based reports to diagnose community health and empower proactive moderators. IdeaScale plans to customize workflows to particular campaigns and upgrade group management of the tool. While this customizability will ensure cross-comparison between groups, IdeaScale aims to establish high-level ROI tracking for all community members. IdeaScale is one of the exceptions among the vendors we looked at because it offers a

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freemium model — a free basic version of the tool and customized functionality to paying clients. IdeaScale is moving into towards running innovation challenges with its new ecosystem platform IdeaBuzz.

A customer shared with us that IdeaScale incorporated changes and features that they wanted and that the solution was easy to set up, providing an intuitive look and feel. Yet, IdeaScale's feedback platform was also criticized, because it does not provide a response mechanism for customers. Moreover, a customer told us that the tools for idea assessment, reporting mechanism, workflow, and ROI calculations all require some improvement.

- › **CogniStreamer supports complex innovation systems.** Based in Kortrijk, Belgium, CogniStreamer, which grew out of the manufacturing business Bekaert, places great emphasis on the need to support more complex innovation ecosystems and closed and centralized inward-looking innovation and externally focused open collaborative innovation. CogniStreamer pursues optimized innovation programs for different types of innovation and offers program templates for design- and engineering-driven co-creation, innovation exploration, and innovation market validation. CogniStreamer thinks that innovation management that is purely software-focused delivers limited value to clients. Instead, CogniStreamer believes in delivering value to its clients in the form of integrated external knowledge for internal knowledge streams, accelerating innovation with advanced technology like semantics, innovation brain-mapping, and providing consultancy, coaching, and training.

A customer reported that the ideas portal is not easy to navigate and is over engineered for many of its users. A lack of support for getting employees more involved in the platform was also mentioned by a customer as an area for improvement, as was the need to make the reporting dashboard more flexible.

- › **KPMG Innovation Factory's strategy is focused on delivering an integrated offering.** Based in Amstelveen, Netherlands, Innovation Factory was acquired by KPMG in 2014. KPMG Innovation Factory prepares for the evolution from innovation point solutions to integrated offerings in support of business and culture transformations. KPMG Innovation Factory supports customers with a broad offering, including consulting to stimulate a more innovative culture. KPMG Innovation Factory will increasingly leverage KPMG's global network to serve clients with a global footprint and provide access to its network of startups, incubators, M&A expertise, financial modeling, investors, business partners, research institutes, and academia. Since early 2016, KPMG delivers software on-premises, where they do not install the software on a client's server, but deliver a combined hardware/software solution that has KPMG Innovation Factory software on it.

A customer pointed out that the tool is very easy to use for innovation participants. On the negative side, the administration for the tool moderator is fairly complex and risks slowing down innovation initiatives. One customer considers training staff to use the tool via physical meetings to be impractical, because toll administrators cannot spend too much time outside the office to obtain training.

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- › **Brightidea’s solution is expanding into innovation apps.** Based in San Francisco, Brightidea offers software and specialized services to map every stage of their clients’ innovation journeys. Brightidea’s portfolio provides features like central tracking of innovation activities, hackathons, design-thinking projects, and open crowdsourcing. Brightidea’s tool offers the possibility to set up, track, and compare various innovation initiatives with the goal of identifying which investments are yielding the best results. Brightidea has worked with over 300 leading global brands. Going forward, Brightidea will leverage its technology and expertise to digitally transform traditional R&D processes, including product development and product life-cycle management. Brightidea is also running idea challenges.

Customers reported that Brightidea is easy to implement and run, and that it has the experience to support external idea gathering. Customers found it helpful to have more permission for users so that a single idea could be evaluated by different people at different stages along the workflow. Yet, a customer complained that Brightidea does not have the right design for employees using mobile phones in order to move ideas along the workflow. Another area for improvement identified by customers was the need to make the admin interface more intuitive.

- › **Nosco’s strategy is focused on developing a “social platform for innovation.”** Based in Copenhagen, Nosco believes that innovation management sits at the intersection of enterprise social, online data collection, and ERP. Nosco focuses on ideation and collaboration, building platforms that are nimble and social and collaborative and engaging. Nosco predicts the innovation management market to develop in these areas. Therefore, Nosco will pursue its strategy of developing a “social platform for innovation” built on ease of use, agility, analytics, and self-service with the aim of supporting cross-functional collaboration and engagement to drive innovation. Nosco expects to see large corporations moving to the second generation of their innovation management initiatives with a greater focus on engaging users through challenge-driven ideation and collaboration — not just the capture and management of ideas. Nosco also anticipates increased adoption from small- and midsize businesses (SMBs), where the need for nimbler, cloud-based solutions is very pronounced. Nosco will continue to develop and package its consulting services to empower innovation professionals with self-helped and collaborative ideation and innovation management. Nosco maintains a strategic partnership with InnoCentive, which provides access to external challenges based on InnoCentive’s solver network of more than 375,000 people.

A customer told us that Nosco has a very approachable and responsive team. Nosco’s simple and clean approach was mentioned as enhancing user participation, even without providing training. However, a customer said that given its size, Nosco lacks the processes that large software providers have, making formal interaction more difficult at times. A customer mentioned that Nosco’s data analytics capabilities and idea-linking must be improved, as well as back-end idea management that facilitates screening of team work. A dashboard to display the current state of maturation of ideas was mentioned as a helpful add-on.

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Strong Performers

- › **Kindling focuses on easy usability and simplicity of design.** Based in New York, Kindling's mission is to modernize the enterprise experience with software that people enjoy using. Kindling believes that ideas evolve best through collaboration and conversation. Features such as commenting, sharing, and mentions aim to spark conversations, while evaluations aim to encourage collaboration among decision-makers. Kindling places a high value on transparency and keeping participants in-the-know about their ideas. At the same time, they strive to reduce innovation overload by sharing only the most relevant and timely content and giving participants fine-grained control over the frequency of notifications. The recommendations engine, driven by a user's interactions with Kindling, can recommend content that the participant might have missed. Going forward, Kindling will prepare for a greater emphasis on supporting the entire life cycle of an idea from where it originates to the return on investment of an idea.

A customer valued the good insight into Kindling's product roadmap and the close partnership approach that Kindling cultivates as part of its customer engagement. This same client, however, said that more work is needed to make the back-end more robust, and that the front-end needs a facelift to stimulate user participation. Future enhancements suggested by a customer include a data visualization engine to help deliver a more engaging story and better visibility of an API that allows a company to build interfaces and share data more easily.

- › **Inno360 brings a strong big data capabilities.** Based in Cincinnati, inno360 combines disparate data sources and subjects them to the various third-party analytical tools, as well as IBM Watson's Sentiment Analysis, relevance scoring, autotagging, and relationship charting. Inno360 aims to continuously improve the data sources and user interface, as well as the ecosystem management, campaign/outreach, and cognitive-enabled features. Inno360's goal is to provide a new release approximately every quarter, building on customer feedback and strategic direction that comes from its thought-leadership initiatives in the open innovation space. Inno360 will continue to provide unique new applications and capabilities in the big data space, including enhanced machine learning, user suggestions, and enhanced analytics. Inno360's vision is to enable the integration of different companies' ecosystems, creating state of the art network relationships between companies and their supply chains.

Customers pointed to inno360's broad range of functions and features that help support innovation workflows. Customers also value its ecosystem of partners and consider it very important to their own innovation initiatives. However, inno360, due to the large number of features, is perceived as complex by some customers, which can act as an impediment to greater user participation. A customer mentioned that while inno360 is a powerful database with many connections, basic users may struggle with navigation and search query building, and that having an internal administrator to support inno360 use is key for successful adoption and implementation.

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- › **InnovationCast has strong roots in social network and knowledge sharing.** Based in Porto, Portugal, InnovationCast believes that most innovation initiatives are too focused on front-end idea management and not enough on what needs to happen before and after ideas. InnovationCast thinks innovation management is closely linked to providing context for social collaboration and driving project portfolio management. InnovationCast redesigned its tool to empower organizations to orchestrate and participate in multi-institutional engagements, with multilateral participation for both, enterprise customers, and SMBs. For SMBs, InnovationCast supports discovery-driven innovation, including trend detection, corporate foresight, R&D collaboration, and technology scouting. Onboarding, shorter time-to-value, and sustained engagement levels have been key areas of investment for InnovationCast. InnovationCast customers can log in with their social networks accounts and post info to their social network accounts. InnovationCast currently has more presence in EMEA but is expanding its local sales function in North America.

A customer underlined the user-friendly and easy-to-integrate aspects of InnovationCast's solution. Despite InnovationCast's social media expertise, a customer pointed to the need for improving integration to better integrate external platforms and provide the customer with more enriched profiles of the users, including their expertise and competencies. InnovationCast recognizes that that it would be helpful if data from users' accounts on social networks could be automatically displayed on their profile so that customers could manage their members' competencies on their user profiles.

- › **InnoCentive shows depth in challenge-driven innovation.** Based in Waltham, Massachusetts, InnoCentive is one of the oldest and most experienced crowdsourcing providers, offering their Challenge-Driven Innovation methodology, innovation management software, and network of problem solvers. InnoCentive runs business, scientific, or technical challenges in many industry sectors. InnoCentive partners with customers looking for solutions to issues that are critical to their R&D or innovation agenda. Together, they refine, abstract, and formulate the problems as challenges. Challenges are formulated and posted internally within an organization, engaging audiences such as their employees, partners, or customers; or they are posted externally to InnoCentive's Solver network of over 375,000 registered experts in over 200 countries who have diverse backgrounds and areas of professional expertise. For challenges targeted at internal audiences, customers can either choose to use InnoCentive's innovation management software or their own. Solvers that submit solutions that meet predefined solution requirements and are accepted by the customer are rewarded with a cash award and/or nonmonetary compensation, as well as the prestige and sense of accomplishment that comes from solving something that no one may have ever solved before. If intellectual property is involved in the challenge, customers typically obtain the intellectual property rights of the winning solution through transfer or licensing in exchange for the preset award amount.

InnoCentive's approach for searching for solutions, which do not necessarily have to be at the idea stage, is very attractive to customers. It makes it very easy for businesses to run complex external challenges. Customers point to external challenges as helping them to generate very concrete results. However, a customer said that they would like to get better and direct communication

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with the solver network without InnoCentive as the intermediary. At present, InnoCentive provides some basic statistics about the solver network. However, the client wants to own their network and not have to lease the InnoCentive network. The customer has its own brand and its own customers and partners already. The client would like to offer an innovation challenges platform, under its own brand, to its partners and customers. The customer said that he is looking for better support from InnoCentive to manage their own network and create a direct relationship with the solver network.

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Supplemental Material

Online Resource

The online version of Figure 6 is an Excel-based vendor comparison tool that provides detailed product evaluations and customizable rankings.

Data Sources Used In This Forrester Wave

Forrester used a combination of three data sources to assess the strengths and weaknesses of each solution. We evaluated the vendors participating in this Forrester Wave, in part, using materials that they provided to us by December 2015.

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- › **Vendor surveys.** Forrester surveyed vendors on their capabilities as they relate to the evaluation criteria. Once we analyzed the completed vendor surveys, we conducted vendor calls where necessary to gather details of vendor qualifications.
- › **Product demos.** We asked vendors to conduct demonstrations of their products' functionality. We used findings from these product demos to validate details of each vendor's product capabilities.
- › **Customer reference calls and survey.** To validate product and vendor qualifications, Forrester conducted reference calls, a total of 15 of the vendors' current customers. Forrester also surveyed a total of 35 of the vendors' current customers, to understand companies' motivations for adopting an innovation management solution as well as the level of satisfaction with the chosen vendor.

The Forrester Wave Methodology

We conduct primary research to develop a list of vendors that meet our criteria to be evaluated in this market. From that initial pool of vendors, we then narrow our final list. We choose these vendors based on: 1) product fit; 2) customer success; and 3) Forrester client demand. We eliminate vendors that have limited customer references and products that don't fit the scope of our evaluation.

After examining past research, user need assessments, and vendor and expert interviews, we develop the initial evaluation criteria. To evaluate the vendors and their products against our set of criteria, we gather details of product qualifications through a combination of lab evaluations, questionnaires, demos, and/or discussions with client references. We send evaluations to the vendors for their review, and we adjust the evaluations to provide the most accurate view of vendor offerings and strategies.

We set default weightings to reflect our analysis of the needs of large user companies — and/or other scenarios as outlined in the Forrester Wave evaluation — and then score the vendors based on a clearly defined scale. We intend these default weightings to serve only as a starting point and encourage readers to adapt the weightings to fit their individual needs through the Excel-based tool. The final scores generate the graphical depiction of the market based on current offering, strategy, and market presence. Forrester intends to update vendor evaluations regularly as product capabilities and vendor strategies evolve. For more information on the methodology that every Forrester Wave follows, go to <http://www.forrester.com/marketing/policies/forrester-wave-methodology.html>.

Survey Methodology

Forrester's Global Business Technographics® Business And Technology Services Survey, 2015 was conducted using an online survey fielded in June through August 2015 of 2,812 business and technology decision-makers located in Australia, Brazil, Canada, China, France, Germany, India, New Zealand, the UK, and the US from companies with 500 or more employees.

Forrester's Business Technographics Global Priorities And Journey Survey, 2015, was fielded to 14,596 business and technology decision-makers located in Australia, Brazil, Canada, China, France, Germany, India, New Zealand, the UK, and the US from SMB and enterprise companies with two or

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more employees. This survey is part of Forrester's Business Technographics and was fielded from December 2014 to March 2015. ResearchNow fielded this survey on behalf of Forrester. Survey respondent incentives include points redeemable for gift certificates. We have provided exact sample sizes in this report on a question-by-question basis.

Forrester's Business Technographics provides demand-side insight into the priorities, investments, and customer journeys of business and technology decision-makers and the workforce across the globe. Forrester collects data insights from qualified respondents in 10 countries spanning the Americas, Europe, and Asia. Business Technographics uses only superior data sources and advanced data-cleaning techniques to ensure the highest data quality.

We have illustrated only a portion of the survey results in this document. To inquire about receiving full data results for an additional fee, please contact data@forrester.com or your Forrester account manager.

Integrity Policy

We conduct all our research, including Forrester Wave evaluations, in accordance with our Integrity Policy. For more information, go to <http://www.forrester.com/marketing/policies/integrity-policy.html>.

Endnotes

- ¹ Traditional organizations claim that without correlation to defined internal processes innovation management solutions will not deliver positive results.
- ² Source: Stefan Lindegaard, "Open Innovation in the Auto Industry: Toyota, Tesla Open Up Patents," 15inno, January 24, 2015 (<http://www.15inno.com/2015/01/24/toyotatesla/>).

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