

# SELECTING THE RIGHT SOFTWARE TO MANAGE IDEAS AND INNOVATION



We have 26 years of facilitating companies in implementing IDEA MANAGEMENT systems for innovation, intellectual property, continuous improvement, suggestion programs, or other employee engagement processes. That experience taught us to get detailed information of your needs.

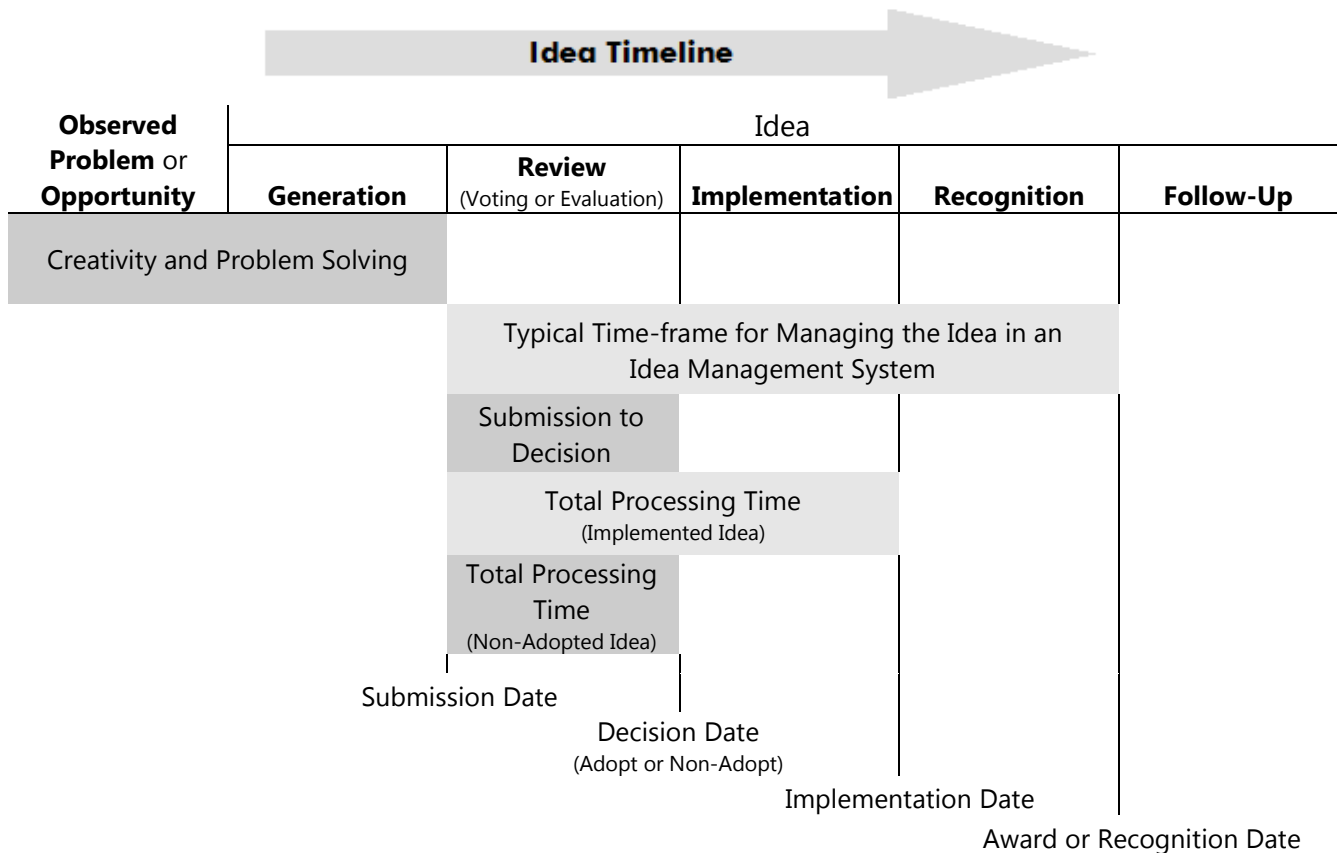
The checklist below is a good start. It was derived from consulting with a wide range of customers. We recommend taking this a step further and adding additional information that is specific to your program (e.g., your workflow). Our *SimNet 8 Enterprise* software is highly adaptive and can meet the needs of most organizations right out of the box. If necessary, the *SimNet 8* software can be tailored to your specific program.

**ORGANIZATION:** \_\_\_\_\_ **CONTACT PERSON:** \_\_\_\_\_ **DATE:** \_\_\_\_\_

## WE WANT TO MANAGE THE FOLLOWING INNOVATION, IMPROVEMENT, & RECOGNITION PROCESSES:

- |   |   |
|---|---|
| <ul style="list-style-type: none"> <li><input type="checkbox"/> Innovation</li> <li><input type="checkbox"/> Kaizen or Continuous Improvement</li> <li><input type="checkbox"/> Social Networking or Collaborative Idea Forums</li> <li><input type="checkbox"/> Staff/Management Idea Forums</li> <li><input type="checkbox"/> Employee Suggestion Systems/Schemes</li> <li><input type="checkbox"/> Teams (Process improvement, Quality Circles ...)</li> <li><input type="checkbox"/> Supplier Idea/Feedback Systems</li> <li><input type="checkbox"/> Agile Manufacturing, Lean Manufacturing, Six Sigma or Other Process/Productivity Improvement Programs</li> <li><input type="checkbox"/> Intellectual Property (IP)</li> </ul> | <ul style="list-style-type: none"> <li><input type="checkbox"/> Customer Complaint/Feedback Systems</li> <li><input type="checkbox"/> Corrective Actions &amp; Corrective Action Teams</li> <li><input type="checkbox"/> Lessons Learned</li> <li><input type="checkbox"/> Safety Programs</li> <li><input type="checkbox"/> Peer Based Recognition (Spot Awards)</li> <li><input type="checkbox"/> Anniversary Awards</li> <li><input type="checkbox"/> Wellness &amp; Attendance Awards</li> <li><input type="checkbox"/> Other Recognition Activities</li> <li><input type="checkbox"/> Pursuing Quality Award (e.g., Baldrige/EFQM)<br/>- specify which one: _____</li> </ul> |
|---|---|

For any idea or team process, it is important to understand the flow of an idea or team project. Below is a sample timeline that may be useful when reviewing requirements on the following pages.



## OVERVIEW QUESTIONS

### TELL US ABOUT YOUR INNOVATION, IMPROVEMENT PROCESSES OR RECOGNITION PROGRAMS!

For each of the process items selected on page one, answer the following questions (e.g., Process 1 could be a Continuous Improvement program and Process 2 an Innovation System)

	PROCESS 1	PROCESS 2	PROCESS 3
Name - of the idea, innovation, improvement, IP, or recognition activity.			
How many years have you been running this process?	<input type="checkbox"/> New <input type="checkbox"/> _____ years	<input type="checkbox"/> New <input type="checkbox"/> _____ years	<input type="checkbox"/> New <input type="checkbox"/> _____ years
Is there a formal specification document and flowchart of how it functions – if not we recommend mapping your process before obtaining a software system to manage it. Provide a copy to the vendors.	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No
Any sample paper-based entry forms? Paper based forms are useful to use when designing an on-line system. Providing a downloadable copy allows people to work off-line before entering it into the system.	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No
Is this something permanent or do you use temporary blitz-type campaigns?	<input type="checkbox"/> Permanent <input type="checkbox"/> Temporary	<input type="checkbox"/> Permanent <input type="checkbox"/> Temporary	<input type="checkbox"/> Permanent <input type="checkbox"/> Temporary
Any existing software? (COTS means commercial off the shelf)	<input type="checkbox"/> None <input type="checkbox"/> In-house <input type="checkbox"/> COTS	<input type="checkbox"/> None <input type="checkbox"/> In-house <input type="checkbox"/> COTS	<input type="checkbox"/> None <input type="checkbox"/> In-house <input type="checkbox"/> COTS
Annual volume (ideas, team projects, recognition activities).			
Participation history – last year or quarter – number of employees			
Total eligible employees.			
Is the process centrally managed or regionally managed?	<input type="checkbox"/> Central <input type="checkbox"/> Regional	<input type="checkbox"/> Central <input type="checkbox"/> Regional	<input type="checkbox"/> Central <input type="checkbox"/> Regional
Is management of the data handled centrally or locally?	<input type="checkbox"/> Centrally <input type="checkbox"/> Locally	<input type="checkbox"/> Centrally <input type="checkbox"/> Locally	<input type="checkbox"/> Centrally <input type="checkbox"/> Locally
How many separate sites or facilities will use the software?			
How spread out these various sites? This may be a single primary site, multiple sites in a single country or sites globally.	<input type="checkbox"/> Single Campus <input type="checkbox"/> Single Country <input type="checkbox"/> Global	<input type="checkbox"/> Single Campus <input type="checkbox"/> Single Country <input type="checkbox"/> Global	<input type="checkbox"/> Single Campus <input type="checkbox"/> Single Country <input type="checkbox"/> Global
How many languages need to be supported?			
Who can participate? For example, if you have two idea systems. Your Continuous Improvement process may be designed more for hourly participation while your Idea Form has a for office/salaried staff.	<input type="checkbox"/> Hourly <input type="checkbox"/> Salary <input type="checkbox"/> R&D/Technical <input type="checkbox"/> Suppliers <input type="checkbox"/> Customers <input type="checkbox"/> Other: _____	<input type="checkbox"/> Hourly <input type="checkbox"/> Salary <input type="checkbox"/> R&D/Technical <input type="checkbox"/> Suppliers <input type="checkbox"/> Customers <input type="checkbox"/> Other: _____	<input type="checkbox"/> Hourly <input type="checkbox"/> Salary <input type="checkbox"/> R&D/Technical <input type="checkbox"/> Suppliers <input type="checkbox"/> Customers <input type="checkbox"/> Other: _____
How many currencies need to be supported?			
How is HR data stored? User information is normally required plus for proper leadership reporting, accurate organizational information is needed.	<input type="checkbox"/> Peoplesoft <input type="checkbox"/> SAP <input type="checkbox"/> Other: _____	<input type="checkbox"/> Peoplesoft <input type="checkbox"/> SAP <input type="checkbox"/> Other: _____	<input type="checkbox"/> Peoplesoft <input type="checkbox"/> SAP <input type="checkbox"/> Other: _____
Time frame to full implementation of new system.	<input type="checkbox"/> Immediate <input type="checkbox"/> Next Quarter <input type="checkbox"/> Next Year	<input type="checkbox"/> Immediate <input type="checkbox"/> Next Quarter <input type="checkbox"/> Next Year	<input type="checkbox"/> Immediate <input type="checkbox"/> Next Quarter <input type="checkbox"/> Next Year
Does data from existing system(s) need to be imported into the new system?	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No

### QUESTIONS RELATED TO GOING ON-LINE

On-line system (web-based) or paper based with clerical data entry? Paper based programs are very rare but some organizations still need them and evaluations may still be done on-line.	<input type="checkbox"/> On-Line <input type="checkbox"/> Paper	<input type="checkbox"/> On-Line <input type="checkbox"/> Paper	<input type="checkbox"/> On-Line <input type="checkbox"/> Paper
Do you want your solution hosted for you (access via internet) or run internally (on your intranet)?	<input type="checkbox"/> Hosted <input type="checkbox"/> Run Internally	<input type="checkbox"/> Hosted <input type="checkbox"/> Run Internally	<input type="checkbox"/> Hosted <input type="checkbox"/> Run Internally
What percent of the employee population has some form of computer access?			
How computer literate is the general workforce? Certain work environments still have a significant portion of the staff that may have weak computer skills.	<input type="checkbox"/> Comfortable <input type="checkbox"/> Functional <input type="checkbox"/> Not Comfortable	<input type="checkbox"/> Comfortable <input type="checkbox"/> Functional <input type="checkbox"/> Not Comfortable	<input type="checkbox"/> Comfortable <input type="checkbox"/> Functional <input type="checkbox"/> Not Comfortable

**COLLABORATION** - The past several years have seen a major shift in how people work on and share ideas. With social networking becoming increasingly popular on the web (e.g., Twitter, FaceBook and LinkedIn), many people implementing IDEA MANAGEMENT want to include those tools when working on ideas. This section reviews how people will interact with ideas as well as other people. One thing to consider when filling in this section is where your organization is culturally. Many organizations may not be ready for everyone to utilize social networking type tools – a more rigid idea system may be appropriate.

<b>HOW IDEAS ARE UTILIZED OR MANAGED</b>	<b>PROCESS 1</b>	<b>PROCESS 2</b>	<b>PROCESS 3</b>
Formal evaluation review process – this is common for traditional suggestion systems and for larger ideas in collaborative approaches.	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No
People can self implement their own ideas – this is common for continuous improvement	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No
Team reviews ideas - moves forward those that have potential.	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No
People can comment on other people’s ideas – this can include commenting on how an idea caused other indirect solutions.	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No
People can vote on ideas (CROWDSOURCING) – this may determine which ideas are used based on voting results.	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No
Score for an idea created - based on voting or other measures. This could be integrated with gaming approaches.	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No
Integrate gaming approaches – if Yes please specify desired approach	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No
People can implement other ideas – sharing their results	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No
Showcase for BEST PRACTICE ideas	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No
Bookmark top ideas – changes to this idea could be emailed to people that bookmark it.	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No

<b>HOW PEOPLE ARE UTILIZED</b>	<b>PROCESS 1</b>	<b>PROCESS 2</b>	<b>PROCESS 3</b>
Create personal Home Page – this supports sharing of information about themselves to help other people find members for their teams	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No
Include pictures of people on ideas they write	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No
Bookmark people – new ideas submitted by that person could be emailed to people that bookmark that person	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No
Post information or articles - they feel others could use on their Home Page	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No
Score people based on participation – this could use a points process or other approach to measure overall participation based on ideas submitted, implemented, cost savings or other metrics.	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No
People Finder – Find people based on the information on their home page or the ideas they have submitted.			
Submit ideas	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No
Participate on team projects	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No
Evaluate ideas when assigned	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No
Implement ideas when assigned	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No
Implement ideas they find useful	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No
Subject matter experts	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No
Utilize Six Sigma Black/Green Belt expertise	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No
Vote on any idea	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No
Vote on ideas only for their work area or other rule	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No
Add notes to any idea	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No
Add notes only to ideas they are involved with	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No
Add notes to ideas for their work area or other rule	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No
Is leadership willing to participate on-line looking at ideas?	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No

<b>GENERAL DATA TO CAPTURE</b>	<b>PROCESS 1</b>	<b>PROCESS 2</b>	<b>PROCESS 3</b>
Participants (submitters, team members, or recognition recipient).	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No
Users can update their personal information (e.g., email).	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No
Team names.	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No
Will you want to support anonymous entries?	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No
Area, department or cost center (generally needed for reporting).	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No
Information about the core idea – normally a problem statement and proposed solution text	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No
Idea implementation notes (if using continuous improvement and pursuing people submitting implemented ideas)	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No
Attachments.	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No
Project milestones.	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No
Cycle times to completion and implementation.	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No
Other people assigned to review or support the activity - facilitators, idea evaluators, implementors and nominators for recognition.	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No
Statistics on savings and costs – could include full cost calculation sheets.	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No
Awards given.	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No
Campaigns (Idea Events) – track entries related to a specific campaign (e.g., June quality campaign)	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No
Tags/Keywords – sort groups to categorize ideas and aid in finding duplicates.	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No
Import of HR data for employees. If on-line – will also need email addresses. Organizational information may also be needed for reporting.	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No
Other:			

<b>CORRESPONDENCE WITH PARTICIPANTS</b>	<b>PROCESS 1</b>	<b>PROCESS 2</b>	<b>PROCESS 3</b>
Correspondence to participants (e.g., submitter, inventor).	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No
Correspondence to other assigned people (e.g., evaluators).	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No
Notify person's manager or key contact for the related topic (e.g., with safety related problems notify the safety manager).	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No
Notify administrator of the process about a new idea or change to an idea.	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No
Outgoing correspondence managed by administrator – not sent until they approve the outgoing list.	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No
Automate generation of letters based on criteria when filling in an entry (e.g., new idea or assigning an evaluator).	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No
Generate follow-up letters or emails to people reviewing, evaluating, implementing the idea?	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No

#### **METHOD OF CORRESPONDENCE**

Printed letters.	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No
E-mail.	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No
Certificates.	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No
Text messages (SMS).	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No
Other:			

**REPORTS AND DATA SEARCHES** - With reports, provide any existing report layouts to TQS Software staff so we can best meet your needs.

<b>GENERAL INFORMATION</b>	<b>PROCESS 1</b>	<b>PROCESS 2</b>	<b>PROCESS 3</b>
User ad-hoc type searches (queries) - look up information as needed	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No
User ability to store searches (queries) for future use.	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No
Preset searches to simplify common look-ups for users.	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No
Search based on idea content to find related ideas	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No

**STATISTICS REPORTS**

Top management reports on status.	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No
Middle and line management reports - Identifying specific status by idea, participation, savings and evaluation. Identify specific information needed for this group. This will require organizational data to be pulled into the software.	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No
Providing information to auditors or for quality awards.	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No

**STATISTICS TO CAPTURE**

Number of entries	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No
Number of participants	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No
Participant participation rate (%)	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No
Average total processing time for an entry	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No
Average processing time for idea evaluation	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No
Number of total open entries (normally for idea and team activities)	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No
Number open entries over X days old	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No
Number of closed entries (what is considered closed may vary by program)	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No
Adoption rate (%) – acceptable ideas or team projects	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No
Total savings	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No
Award cost – cash awards	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No
Award cost – points given	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No
Award cost – recognition activities	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No
Number relating to specific keywords or campaigns	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No
Other:			

**TRACKING IDEAS AND AWARDS**

Managing late evaluations and implementations.	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No
Managing cash awards paid.	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No
Special award report for payroll or award vendor.	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No
For points award processes - managing points given, points redeemed and any merchandise given out.	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No
On-line Award Statements - available for each participant.	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No
Spot Recognition Awards - identifying which people are nominating others.	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No

**OTHER INFORMATION**

Creating graphs - SimNet can imbed these onto your Portal Page.	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No
Several graphs and data on a single report.	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No
Surveys to get feedback from participants on whether the process is on-track.	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No
Distributing reports electronically via e-mail (e.g., using Adobe PDF, MS Excel or HTML).	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No
Posting reports on a web site.	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No

## AWARDS AND RECOGNITION

TYPE OF AWARD OR RECOGNITION	PROCESS 1	PROCESS 2	PROCESS 3
Cash awards.	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No
Gift Certificates.	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No
Points – these could named something that fits your program (e.g., shares)	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No
Milestone points - points accrue and at certain milestones, awards or recognition are given (points keep accumulating to the next milestone).	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No
Merchandise (e.g., a gift given out for an implemented idea) – Merchandise selected based on a points program would be part of a points process below.	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No
Certificates, pins, stickers	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No
Nominator based recognition - filled out card or certificate	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No
Recognition events (e.g., luncheons, banquets, presentations)	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No
Time Off	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No

### HOW AWARDS ARE HANDLED

Awards calculated automatically – based on a questionnaire filled in by the evaluator/manager/nominator or a cost calculation sheet.	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No
Automatic links to accounting or payroll.	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No
Does a sign-off process need to be set up for awards?	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No
Raffles or drawings – select winners based on participation criteria (e.g., 2 new ideas this year).	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No
Track Points redeemed	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No
Participants redeem awards from on-line store - gift catalog or redemption of points awards for merchandise.	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No
Manage inventories (including gift certificates by serial number).	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No
Integrate awards and recognition with other programs – points or milestone points can be shared with a wide range or programs.	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No

### PLEASE LIST BELOW ANY SPECIAL REQUIREMENTS THAT YOU HAVE:

## How Will People Use Your Idea Management Software?

Certain people will need access to the software. In certain work environments, some of these groups may not have a computer in their work area where they can access the system. To get facility wide access, kiosks may need to be setup to allow those people access to the system (e.g., in break rooms). Some people may not work for your organization and have to be handled differently.

Who Will Use the Software	What Software Options They Need						
	Enter Ideas or Nominate Recognition	Update Ideas	Access Personal Awards	Vote On Ideas	Search Database	Run Reports	E-mail Notification
EMPLOYEES (e.g., Submitter or Team Member)							
CONTRACTORS							
R&D OR PRODUCT DEVELOPMENT							
OUTSIDE RESEARCHER (e.g. University)							
CUSTOMERS							
SUPPLIERS							
EVALUATORS & IMPLEMENTORS							
PEOPLE REVIEWING AWARDS GIVEN							
TEAM FACILITATORS							
LEGAL COUNSEL (e.g. patent application)							
SUPERVISORS							
MIDDLE MANAGEMENT							
TOP MANAGEMENT							
UNION LEADERSHIP							
LOCAL COORDINATORS							
LOCAL DATA ENTRY STAFF							
OUTSIDE VENDOR (Outsourcing Data Entry)							
ADMINISTRATOR OR CHAMPION							

Below reviews how the software system could be implemented. This consolidates the different potential users of the software into five groups. This will help us identify which software solution will be the best fit.

Method of Accessing & Entering Ideas	Who Has Access				
	Administrator	Data Entry	Manager	Submitter	Evaluator
1. <b>SPREADSHEET/DESKTOP DATABASE</b> - A single computer or networked version for use by the administration staff, data entry people and key users. An on-line form could be set up to capture people's ideas or a paper form could be used. <i><b>This approach will not allow users to check status of their ideas on-line, just enter new ideas.</b></i>				Idea entry only if on-line form used	N/A
2. <b>FULLY ON-LINE</b> - Direct access using the intranet (or internet) to access idea status or add new ones. In this situation, users will be able to check status on-line and evaluators finish evaluations on-line. The administrator module or separate admin features will still be used by the administration staff to create reports and set up the system.					
3. <b>FULLY ON-LINE - AUTHENTICATED</b> - Same as item 2 but with users directly authenticated (no log-in for the system). This will require HR data about the person to include both HR and network information to properly authenticate. Specify how you handle authentication (e.g., Active Directory)					
4. <b>PORTAL PAGE</b> - This can be used in conjunction with any of the above items. It is a front end that you can maintain but integrates with the software for a variety of reasons (e.g., submit idea, dashboard of program stats, imbedded reports, graphs). It can include information related to the specific user accessing the site (e.g., personal dashboard stats, ideas they have for review...).					

## TECHNICAL QUESTIONS

The following technical questions are about the computer systems your organization has and what kind of software solution you want to run on those systems. You may not initially be able to answer all of the questions.

### COMPUTER PLATFORMS THE SOFTWARE WILL RUN ON

Workstation operating system	<input type="checkbox"/> Windows XP <input type="checkbox"/> Windows Vista	<input type="checkbox"/> Windows 7 <input type="checkbox"/> Other: _____
Browser	<input type="checkbox"/> Internet Explorer <input type="checkbox"/> Other: _____	Version: _____
Web server (for on-line versions running on intranet) Note: Total Quality Systems Software can also host <b>SimNet 8</b> product for you via the Internet.	<input type="checkbox"/> IIS <input type="checkbox"/> Unix <input type="checkbox"/> Other: _____	Version: _____
Network being used (e.g., NT Sever or Novell)	<input type="checkbox"/> Windows Server 2008 <input type="checkbox"/> Novell	<input type="checkbox"/> Other: _____
E-Mail system – also identify if there is a SMTP mail server available for intranet applications	<input type="checkbox"/> Exchange <input type="checkbox"/> Lotus	<input type="checkbox"/> Novel Groupwise <input type="checkbox"/> Other: _____

### COMPUTER WORKSTATION

Microprocessor (e.g., Pentium, Pentium Pro, Core 2)	
RAM memory	GB
Hard disk space available	GB
Printers – Laser, inkjet or other. Color printers available?	
Microsoft Office Loaded – include version.	<input type="checkbox"/> Yes <input type="checkbox"/> No Version: _____
Adobe Acrobat Reader Loaded (for passing report electronically) – include version	<input type="checkbox"/> Yes <input type="checkbox"/> No Version: _____
Access to Internet (this is useful for key users of the software though not needed for average end-users).	
Internet Meeting Software Supported (used for support activities)	

METHOD OF STORING DATA	CURRENT	DESIRED	<b>SimNet 8</b> SOFTWARE SUPPORTS
<b>SPREADSHEET</b> – Effective only for very small programs. Note: spreadsheets may have a record limit- Microsoft Excel's limit is around 64K records (or rows). Spreadsheets will not work if you want an on-line system.	<input type="checkbox"/> MS Excel <input type="checkbox"/> Other _____	<input type="checkbox"/> MS Excel <input type="checkbox"/> Other _____	
<b>DESKTOP RELATIONAL DATABASE</b> – Works for smaller organizations that do not handle higher idea volumes or have important security issues.	<input type="checkbox"/> MS Access <input type="checkbox"/> MS SQL Server Express Edition <input type="checkbox"/> Other _____	<input type="checkbox"/> MS Access <input type="checkbox"/> MS SQL Server Express Edition <input type="checkbox"/> Other _____	<b>X</b> MS SQL Server Express Edition
<b>CLIENT/SERVER DATABASE</b> (e.g., Microsoft SQL Server) – generally the best overall solution. It is necessary for large idea volumes, multiple-sites, larger organizations, or where security is an issue. Your organization's IT department may also require a client/server database.	<input type="checkbox"/> MS SQL Server <input type="checkbox"/> Oracle <input type="checkbox"/> Other: _____ Version: _____	<input type="checkbox"/> MS SQL Server <input type="checkbox"/> Oracle <input type="checkbox"/> Other: _____ Version: _____	<b>X</b> MS SQL Server & MS SQL Server Express Edition
<b>GROUP-WARE</b> (e.g., Lotus Notes) – If your organization already has Lotus Notes or a related product installed, this may be a viable option, otherwise we recommend staying with a more standard client/server database in this situation.	<input type="checkbox"/> Lotus Notes <input type="checkbox"/> Other: _____	<input type="checkbox"/> Lotus Notes <input type="checkbox"/> Other: _____	