



Methodology pack LEAN, LEarning from Analogies WP4

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Introduction

Lean goals and expected results

This project, through the transfer of an innovative methodology based on the use of “analogies” and cross-cultural cues for the management education, answers to the increasing need for skilled resources for managers and entrepreneurs. A particular attention is devoted to the specific sector of small family-based enterprises, whose business approach is often far from the consideration of that set of multidisciplinary hints and suggestions which are of the utmost importance in a context dominated by globalization and intercultural dynamics.

Multicultural training is intended to be an effective instrument to help SMEs entrepreneurs and managers to acquire an intercultural vision based on a cross-functional set of information, histories and best practices which are often very far from their way-of -thinking. In so doing, entrepreneurs will be supported to look behind the specific scenario in which their activities take place, learning how to reason and act in global and intercultural terms.

In particular, the analogical training addresses SMEs' needs to:

- increase the capabilities to act in a global context
- increase the aptitude to analyze problems in a strategic way, combining different cultural approaches
- increase the problem solving skills, with a particular emphasis on the management of multiculturalism and internationalization processes
- support companies family-owners' aptitude for a new concept of leadership, based on a multicultural, competitive and business-oriented approach
- spread a cross-functional approach, able to support SMEs' evolution from a traditional functional structure to a new inter-functional one.

The project will allow to reach various tangible results:

- The state of the art of theoretical and operational models of cross-cultural education in EU
- The identification of Cypriot, Polish and Romanian training needs regarding informal and multicultural learning methodologies
- The development of a set of training sessions locally customised on the base of ISTUD methodology
- The training of local trainers from Cyprus, Poland and Romania who could play the role of facilitator in delivering training sessions
- A wide exploitation and dissemination of results.



Aim of the document

The present document is intended to offer concrete and effective instructions for the delivery of analogical training sessions in each partner country. In the following chapters, ISTUD, as methodology transfer, will provide:

- **Chapter 1:** Regional programmes outline for CY, PL and RO
- **Chapter 2:** Delivery guide – Programme agenda and teaching notes (including a detailed training planning). Teaching notes will be aimed at providing effective and concrete instructions for the delivery of analogies in each partner country (in this section, we will detail what can be done in each training session at operative level, itemizing the list of requested materials and further suggestions that will help the partner institutions to deliver the methodology in a successful way)
- **Chapter 3:** Assessment methodology, including instruments and criteria for assessing the satisfaction of participants that will be involved
- **Annexes:** slides set, including 3 customized analogies (one for each partner country), developed in accordance with the partners’ suggestions with the aim to ensure the highest possible level of cultural embeddedness.

To whom it is addressed

The present document has been conceived to be an useful instrument at disposal of:

- **Partner institutions**, that will be responsible for the selection of national trainers and moderators.
- **National trainers and moderators** that will be responsible for the effective and concrete delivery of the methodology and will be requested to be familiar with the didactic approach as well as with the teaching style that should be adopted.

As a matter of fact, teachers and moderators will have distinct and specific roles. The **teacher** will be in charge of the contents delivery and will be selected by the organizing institution considering the following requirements:

- long time experience (proofed by cv, references...) in the training field, both at academic or more informal level
- good communication capabilities (strongly required to ensure the highest possible level of involvement); teacher will be asked in particular to exploit the evocative power of images, graphics....avoiding every kind of formal approach that could turn out to be boring or not stimulating.

The lecturer is not requested to have a solid organizational/managerial culture, since he/she is not expected to cope directly with the comparisons between the contents and the participants’ professional experience. His/her task is rather to open new horizons, leading all the participants out of their working environment while raising evocative images and representations.

The **moderator** will be requested to assume the role of facilitator in the participants’ approach to the analogy. According to our experience, he/she should be:

- well trained in topics concerning organizational culture



- experienced in the delivery of training sessions
- capable of creating an interactive learning environment

His/her task will be to “create a sort of footbridge” connecting the narrative with the training phase, explaining what are the similarities and the lessons that participants can infer from the teacher’s presentation. His/her role is essential as he/she must be extremely interactive and conscious of the methodology, while having a clear idea of the reported contents from which the analogies must be drawn.

- **Further stakeholders at national/international levels** that will be involved in the dissemination phase and will be requested to successfully deliver the suggested methodology even after the project completion.



Chapter 1 regional programmes outlines for Cyprus, Poland and Romania



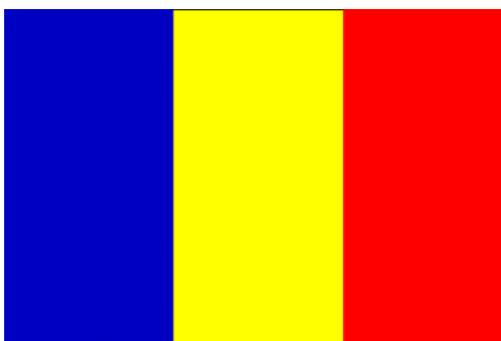


Project outline

Target group	Senior and middle managers of medium and large corporations
Objectives	<ul style="list-style-type: none"> - planning and organization - problem solving - decision-making
Main contents	<p>The Warsaw Ghetto Uprising. During the second World War in German-occupied Poland, German occupational authorities began to concentrate over three million Jews into a number of extremely crowded ghettos located in large Polish cities. The largest of these, the Warsaw Ghetto, concentrated approximately 300,000–400,000 people into a densely packed, 3.3 km² central area of Warsaw. Thousands of Jews died due to rampant disease and starvation under SS-and-Polizeiführer Odilo Globocnik and SS-Standartenführer.</p> <p>Just before the German final operation began, the Leader of the Jewish Council in Ghetto committed suicide once he became aware of the true goal of the Germans’ "resettlement" plan, which was to transport the remaining Ghetto population to Treblinka extermination camp.</p> <p>When the deportations first began, members of the Jewish resistance movement met and decided not to fight with the SS directives, believing that the Jews were being sent to labor camps and not to their deaths. By the end of 1942, Ghetto inhabitants learned that the deportations were part of an extermination process. Approximately 254,000–300,000 Ghetto residents met their deaths at Treblinka during the two-month-long operation. Many of the remaining Jews decided to revolt. When Germans entered the ghetto, they decided to resist to the last man and Jewish resistance raised within the Warsaw Ghetto. Jews had support of 220 fighters and each was armed with a handgun, grenades, and Molotov cocktails. Some weapons were handmade by the resistance, sometimes such weapons worked, other times they jammed repeatedly. The Germans were systematically burning houses, block by block using flamethrowers and fire bottles, and blowing up basements and sewers.</p> <p>Support from outside the Ghetto was limited. While the battle continued inside the Ghetto, the Polish groups AK and GL attacked German units near the Ghetto walls and attempted to smuggle weapons, ammunition, supplies, and instructions into the Ghetto. AK disseminated information and appeals to help the Jews in the Ghetto, both in Poland and by way of radio transmissions to the Allies. The Polish citizens organized rescue missions, and many actions to help the Jewish fighters. Ultimately, the efforts of the Jewish resistance fighters proved insufficient against the German occupation system. The German task force dispatched to put down the revolt and complete the deportation action numbered 2,090 men armed with artillery pieces, armored vehicles, 82 machine guns, and training battalions, etc. the remaining fighters from the organization</p>



	<p>escaped the Ghetto through the tunnel and relocated to the forest. This event marked the end of significant fighting. At this point, the organized defense collapsed. It was the largest single revolt during the second World War and ended when the poorly armed and supplied resistance was crushed by the Germans, who officially finished their operation to liquidate the Ghetto.</p> <p>Apart from 8 buildings the former Ghetto was completely destroyed. The fighters who survived and thousands of remaining Jewish civilians took cover in the sewer system and in the many dugout hiding places hidden among the ruins of the Ghetto. The Germans used dogs to look for such hideouts, then usually dropped smoke bombs down to force people out. Sometimes they flooded these so-called bunkers or destroyed them with explosives. Most of the organization's remaining leaderships and dozens of others committed a mass suicide by ingesting cyanide. Some committed suicide to protest the lack of reaction from the Allied governments.</p> <p>The Warsaw Ghetto Uprising took place over a year before the planned Warsaw Uprising of 1944, several hundred survivors from the first uprising took part in the later uprising.</p>
<p>Duration/articulation</p>	<ul style="list-style-type: none"> - 1 day - analogy follow up (1 month later)
<p>Teaching methods selected</p>	<ul style="list-style-type: none"> - Video - PPT - Group discussion - Scenario Exercises (in the follow-up activities)
<p>Trainers' profile and main competences</p>	<p>To be familiar with the historical facts of the World War II in Poland. To have the ability to present the main characteristics of that period and transfer to the audience the reasons and main competencies which took place.</p>
<p>Program's evaluation tools</p>	<p>questionnaires, follow-up in 1 month time with added time for feedback</p>





Project outline

Target group	Top and middle management
Objectives	Leadership training for the development of charismatic leadership skills, understanding the decision-making process and the different types of company and leadership.
Main contents	Lecture on the late communist and transition period in Timisoara and Romania, focusing on the major differences between communism, capitalism and democracy, particularly on their leaders and leadership methods. Details on each system's effect on the people as well as the difficulties it posed to the leaders, and solutions attempted in the struggle to reach balance.
Duration/articulation	1 day training, follow-up after 1 month
Teaching methods selected	<ul style="list-style-type: none"> - Video - PPT - Group discussion - Scenario Exercises (in the follow-up activities)
Trainers' profile and main competences	Knowledgeable of recent history in the area, as well as advanced notions of socio-psychology and socio-politics, captivating style, charisma, familiar with large groups and training as well as european projects
Program's evaluation tools	questionnaires, follow-up in 1 month time with added time for feedback





Project outline

Target group	SME's - mainly below 10 employees
Objectives	<ul style="list-style-type: none"> - Problem solving - Meeting customers' needs - Risk prevention - Crisis management
Main contents	<p>The economic miracle after Turkish invasion.</p> <p>After the turkish invasion in 1974, Cyprus was destroyed in physical as well as in economic terms. Due to their continuous efforts and persistence, Cypriots succeeded the economic miracle, which resulted the recreation of the island and begining of a new era.</p>
Duration/articulation	<ul style="list-style-type: none"> - 1 day analogy - Follow up after 15 day
Teaching methods selected	<ul style="list-style-type: none"> - Video - PPT - Group discussion - Scenario Exercises (in the follow-up activities)
Trainers' profile and main competences	To be familiar with the above facts that took place in the island, from 1974 and afterwards. To have the ability to present as simple as possible the main characteristics and parameters of that period and transfer to the audiene the reasons and main competences which took place. This case is very useful, since the Cyprus Economy after the recent bail-in faces many problems and needs rebooting.
Program's evaluation tools	<p>Questionnaire workshop (1 day analogy)</p> <p>Transfer knowledge Questionnaire (follow up after 15 days), after having time to reflect & digest the content of seminar</p>



Chapter 2 Delivery guide – Programme agenda and teaching notes

The standard analogical session stretches over about a day and is generally divided into

- 3 learning sessions
- 1 half a day follow-up after 2/3 weeks

In the following pages a detailed overview of the programme is provided together with instructions concerning teaching materials and equipments to be used in the delivery of each learning session.

Training planning

09.00-09.20

1st session: Methodology presentation (10/20 minutes)

Aim of this session is to present the analogical approach, highlighting what are the assumptions behind its adoption and identifying the learning areas that can be addressed

09.20-10.35

2nd session: Contents delivery (60/75 minutes)

During this session, participants will be involved in the narration phase, consisting of the delivery of the selected topic that will be in charge of a lecturer/teacher whose task is to present the mere contents without investigating the social/organizational dynamics in the background

10.35-11.15

3rd session: Decoding and debate (40 minutes)

During this session, the teacher will be replaced by the moderator whose task is to connect the reported information with the daily professional experience and needs of the participants. After the end of the decoding phase, participants will be invited to play an active role in the learning session, by submitting questions/considerations in matter.

Two/three weeks later: follow up session (half a day)



Teaching notes

How to deliver Session 1 - Methodology presentation

Time Needed: 10/20 minutes (09.00 – 09.20)

What do to:

- This session will start with the welcome speech of the host institution’s representative (in our experience this role has always been coincident with that of the moderator), whose aim will be also that to introduce the participants to the suggested methodology, highlighting in particular:
 - what are the cultural assumptions behind the suggested methodology (make reference to the theories regarding the “humanities for management” and the more general evolution towards an humanization of managerial culture, required in the light of the growing challenges affecting our economy and society)
 - what are the main benefits that can be derived from such kind of training approach (holistic education, wide-spectrum view on the strategic challenges, capacity to effectively combine elements belonging to different fields, evolution towards an organizational paradigm inspired to the principles of trans-functionality...)
- The moderator will then introduce himself/herself and will ask the participants to briefly introduce themselves (this introduction is not strictly required, but can be useful in order to create a more familiar and stimulating atmosphere)
- The moderator will finally present the agenda of the training session, explaining in detail how the encounter will be structured and how participants are expected to participate.

Materials needed to deliver the session:

Slides set (2/3 slides presenting the hosting institution and the methodology in the light of the above-mentioned features – slide set will be provided by ISTUD as methodology transfer)

Further suggestions

Preliminary discussions between the training institution and the trainees or their representatives will be useful to better focus what are the training needs of participants, that should be recalled during the presentation in order to make clear what are the learning priorities that will have to be addressed.

In this context, further possible suggestions could arise from the participants. In this case, the moderator will have the responsibility to decide if they are coherent with the established priorities or not.



To better emphasize the areas of expected impact, the moderator should rely upon a flipchart that will be used to stress the agreed priorities and, if needed, the challenges that can be envisaged.

A strong and clear agreement about the expected results of the training activity is absolutely requested in order to avoid the perception of having wasted time!

How to deliver Session 2 - Contents delivery

Time Needed: 60/75 minutes (09.20 – 10.35)

What do to:

- This session will consist of the narrative presentation of the selected topic that has been identified as “analogical”
- The teacher will then introduce himself/herself, asking all the participants to present themselves and to freely intervene whenever they want.
- He/she will finally present the selected training topic, when possible making use of ppt presentations, including pictures, maps, graphics...and whatever can be requested to draw the attention. The presentation should be conceived as a sort of opened lecture, having a very interactive approach.

Materials needed to deliver the session:

Slides set (max. 20, explaining in clear terms the analogical topic). Slides set is provided in the section “Annexes”.

Slides will have to be prepared considering the following requirements:

- accessibility for end-users that are not supposed to be prepared on the topic in matter (avoid long dissertations or extremely filled-up slides)
- look&feel: graphic effects, maps, high-resolution pictures (at least 300 dpi) are always a “must”
- no academic style should be adopted (avoid quotations or references).

Further suggestions:

Participants’ presentation should consist of a brief explanation of each attendee’s professional position, training needs and expectations towards the training session (max. 2 minutes for each one). Expectations will be eventually listed on the flipchart to better focus the following activities.

To better involve people in the presentation, the teacher will be asked to frequently interrupt the lecture, raising questions as:

- can you understand?
- do you have any question?
- have you comments or suggestions in matter?
- is the explanation clear enough?



Slides set could, but must not necessarily, include references to the analogical hints. If possible, the teacher/lecturer should be invited to put a particular emphasis on the explanation of those points that reveal clear analogical meanings, but must not investigate them in an analogical perspective: this task will be then carried on by the moderator in the following session.

A particular attention will be requested in the teacher contact phase. To this aim, the hosting organization should envisage the opportunity of a brief preliminary conversation, aimed at sharing with him/her all the most relevant information concerning the setting and the expectations of the participants (a sort of check list could be also provided, just to explain what can be done and what should be avoided).

How to deliver Session 3 – Decoding and debate (40 minutes)

Time Needed: 60/75 minutes (10.35 – 11.15)

What do to:

- This session will be in charge of the moderator who is requested to assume the role of facilitator in the participants’ approach to the analogy. His/her task will be to “create a sort of footbridge” connecting the narrative with the training phase, explaining what are the similarities and the lessons that participants can infer from the teacher’s presentation.
- The moderator plays an essential role as he/she must be extremely conscious of the methodology, while having a clear idea of the reported contents from which the analogies must be drawn.
- His/her role must be as interactive as possible, since the identified analogies must be connected with the participants’ needs. To this aim, a flipchart will be extremely useful, just to fix all the comments of the participants and their training expectations.
- In our experience, the moderator has always been an expert in the professional field of the participants (generally organizational/managerial culture).
- His/her intervention implies usually two distinct phases:
 - the former, being devoted to the explanation of the most relevant analogical hints that can be inferred from the teacher’s presentation
 - the latter, consisting of an opened dialogue with the participants that can intervene submitting new questions or making some reflections.

With the aim to help all the attendees to better understand the connections existing between the analogical topic and their daily professional activities, a further tool will be provided: a sort of action plan that the moderator will deliver to all the participants. The attendees, on their side, will be requested to fill it in before the follow-up session. This action plan will be structured as a list of concrete goals that participants are assumed to achieve, detailing in specific terms how and when they will be reached. In so doing, training sessions will be effectively linked with the professional needs and environments of involved people (an action plan example is provided at page 23 of the present document).



Materials needed to deliver the session

Slides set (max. 2/3, including a list of the analogies that can be identified in the teacher’s presentation). Slides set is provided in the section “Annexes”.

A flipchart is essential to integrate the moderator’s presentation with the comments raising from the attendees.

Further suggestions

This phase of the training session is crucial, since from its success depends the satisfaction of the participants. Possible inconveniences can intervene, as:

- participants do not react or do not submit questions: in this circumstance the moderator must be capable of going beyond his/her track, submitting more pressing questions as: do you envisage any connections between the reported story and your professional experience/challenges? What have you thought while the teacher was speaking? Do you consider “x” or “y” as relevant elements for your professional success?
- participants intervene beyond expectations: it is a good sign. In this case the moderator can even play a simple role of coordinator, collecting all the suggestions and giving them an order. In such circumstances, the analogies raise often directly from the participants and no decoding is required.

How to deliver the follow up session (half a day)

Time Needed: 4 hours (generally two weeks after the delivery of the training session)

Two/three weeks after the delivery of the analogy, a follow-up session will be provided with the aim to check the achieved results in terms of efficacy, acquired competencies, but also criticalities and emerging challenges. The follow-up session will represent an occasion to reflect upon further areas of improvements and will support the participants to better understand what are the most useful and fruitful suggestions for their professional life.

Goals of the follow-up session will be:

- increase participants’ awareness respect to the former training “experimentation”, considering in particular criticalities and success factors experienced by the participants after the delivery of the analogy
- strengthen the learning process, offering useful tools for a better assimilation of the lessons learnt
- orient energies, investigating if and how the learning process can directly impact the daily professional activities and focusing energies and resources on the potential successes
- plan improvements, creating enhancement opportunities for the development of specific competencies or the management of problematic situations.

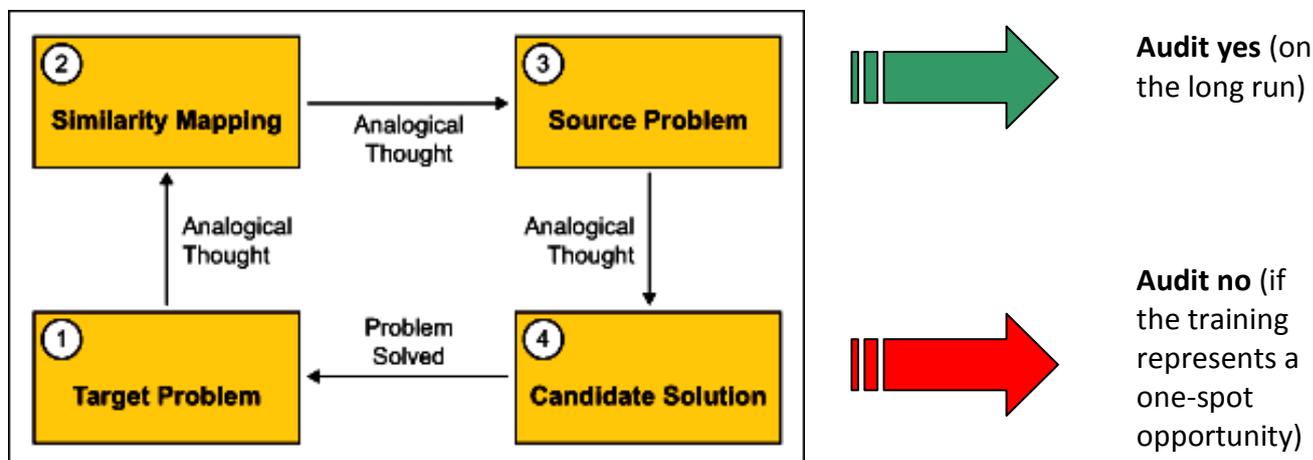


The follow up session will be structured as follows:

- having received the action plan template after the analogical training session, each participant will share it with the lecturer and the other colleagues, explaining in detail how and when the single initiatives will be adopted
- the lecturer will help the participants to define the coherence between the highlighted items, the identified training needs and the evidences of the training session, eventually stimulating further suggestions and areas of improvement.

The follow up session is expected to be informal and very interactive, with a specific focus on the organizational training needs. Each participant will be free to carry his/her contribution on the single topics, while the lecturer will be invited to make use of a flipchart to summarize to main evidences emerging from the discussion.

Chapter 3 - Assessment methodology for monitoring and evaluating the learning session



Analogies should be regarded as a humanistic training path that can not be measured in terms of expected kpi or quantitative indicators.

In our opinion, a qualitative customer satisfaction questionnaire should be provided at the end of the follow-up activities, including a sort of check list that encompasses the following questions:

- Did you find the training proposal coherent with your current professional needs and challenges?
- Have you been able to clearly identify suggestions/lessons that can be applied to your professional environment?
- Would you recommend a similar experience to your colleagues?
- Were the analogical hints clearly identifiable and coherent?
- Have you been able to understand the “reason why” of the suggested training path?

When possible, a ranking scale could be adopted, stretching, as usual, from 1 (not at all) to 5 (yes completely).

As reported in the graphic above, a real audit can be envisaged in particular when the training path has been conceived on the long run, since this is the only possible way for producing effective and tangible results on the target population. One-spot analogies are equally stimulating, but risk to produce a sort of “entertainment effect” that makes the audit process even more difficult.

In detail, the evaluation process will encompass two different phases:

- A customer satisfaction questionnaire (see the selected template in the following section), that will be provided after the delivery of the analogical training sessions, whose aim is to generally evaluate the participants’ satisfaction level respect to the following items:
 - Contents
 - Teaching methods
 - Teaching materials
 - Teacher contribution
 - Functioning of the work group



- Opinion on the logistic organization
- An efficacy evaluation that will be carried on in the frame of the follow-up activities (2 weeks after the delivery the training sessions) and will include:
 - A discussion between the moderator and the participants to reflect upon the organizational dynamics that can be activated on the basis of the suggested training session
 - An action plan for the following implementation of coherent initiatives at organizational level (see following section)



Customer satisfaction questionnaire

The questionnaire we kindly ask you to fill in will provide us with information concerning quality and efficacy of this workshop. The results' elaboration will allow us to improve the quality of our services and processes.

Thank you for your help.

1. Would you consider your participation at the workshop as a:

<i>negative</i>	1	2	3	4	5	<i>positive</i>
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2. On a scale from 1 to 5 (1= poor, 5= excellent), how would you evaluate the workshop in relation to:

Contents

<i>poor</i>	1	2	3	4	5	<i>excellent</i>
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Teaching methods

<i>poor</i>	1	2	3	4	5	<i>excellent</i>
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Teaching materials

<i>poor</i>	1	2	3	4	5	<i>excellent</i>
-------------	---	---	---	---	---	------------------

3. How would you evaluate the teacher contribution?



poor

1	2	3	4	5
---	---	---	---	---

excellent

3.1 More specifically, which is your evaluation for every teacher involved?

SE CI SONO PIU' DOCENTI METTERE NOME DOCENTE 1

poor

1	2	3	4	5
---	---	---	---	---

excellent

NOME DOCENTE 2

poor

1	2	3	4	5
---	---	---	---	---

excellent

4. How would you evaluate the functioning of the work group?

poor

1	2	3	4	5
---	---	---	---	---

excellent

5. What is your opinion on the workshop's organisation (schedule, length etc.)?

poor

1	2	3	4	5
---	---	---	---	---

excellent

6. What is your opinion on the logistic organisation (conference rooms, training supports, etc.)?

poor

1	2	3	4	5
---	---	---	---	---

excellent



7. Are there any other relevant topics you would like to focus more on?

8. Comments/Suggestions



Action plan sample

Goal 1	Review of the organizational structure (fostering the shift towards a multifunctional approach)
How	<p>Plan periodical meeting involving the main referents of the functions/business units that operate within your company</p> <p>Support the creation of online internal community for sharing experiences and best practices among company members</p> <p>Foster the evolution towards open source access to strategic information (both online and offline)</p>
When	<p>Plan periodical meeting: by 1 month</p> <p>Support the creation of online internal community: by 1 year</p> <p>Foster the evolution towards open source access to strategic information: by 1 year</p> <p>Promote the integration with other organizations/business units: by 1/2 years</p>



Goal 2	Set qualitative indicators to measure the creativity of people working for your organization
How	Introduce a sort of ranking scale (from 1 to 5 for example) to monitor the following parameters: <ul style="list-style-type: none"> - Number of new ideas/suggestions provided by the employees in 1 year's time - Number of innovative/lateral solutions to daily problem solving provided by the employees in 1 year's time - Number of creative projects that can be directly referred to trainees' initiatives
When	By 1 year after the project completion
Goal 3	Promote the integration with other organizations/business units to promote efficiency and stimulate open innovation approaches
How	Create a pool of people working at the "organization's borders" to create knowledge sharing opportunities with other and complementary companies, functions or business units Implement your synergy with education and cultural providers as Universities, business schools or think-tanks to enrich the cultural background of your organization
When	By 2 years after the end of the project
Goal 4	Support the sharing of ideas in not-structured/hierarchical contexts Introduce organizational "flat" paradigms in the daily



	routine of employees
How	Create environments in which employees can share ideas, hints and also critics in a peer-to-peer context, reproducing the set of the analogical session
When	By 1 month after the end of the project
Goal 5	Promote the sharing of best practices/skills/experiences to stimulate creativity and synergy
How	Set up an innovation and creativity laboratory inside your organization where ideas and experiences can be shared at 360 degrees, exploiting the powerful suggestions of lateral thinking. To this aim it could be useful to offer each employee a smart phone application to freely interact with the other members of the laboratory even out of the working hours.
When	At least once every 6 months