Exploring Perceived and Actual Innovation Outcomes: The Case of a Canadian Foodservice Organization

Thesis submitted in accordance with the requirements of the University of Liverpool for the degree of Doctor of Business Administration

by

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Declaration of Own Work

I declare that this thesis, which I submit to the University of Liverpool for examination in consideration of the award of a Doctorate in Business Administration is my own personal effort. I have not already obtained a degree from the University of Liverpool or elsewhere on the basis of this work. Furthermore, I took reasonable care to ensure that the work is original, and, to the best of my knowledge, does not breach copyright law, and has not been taken from other sources except where such work has been cited and acknowledged within the text.

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Abstract

The goal of this thesis research is to identify what conditions may be associated with successful outcomes of innovation by considering individual perspectives, demographics, cross-functional teams and actual business metrics within the studied foodservice distribution organization. The overarching research question is "what factors may be associated with successful innovation outcomes" both perceived and actual and the answer to this question was sought using an action research methodology. Quantitative methods were used to survey the perceptions of innovation outcomes by front-line sales force of the studied organization. Eight hundred and ninety respondents were canvassed across Canada with 709 responding and 659 qualified. As well, actual business outcomes of the innovation were tracked to examine actual results and compare them with perceptions of innovation outcomes. The key findings were then discussed and socialized within my organization and implemented within the business alongside an innovation that was being deployed in order to understand any associations that may exist in real time. The discoveries from this research are also presented including that individual peceptions as well as organizational practical measures must be taken into consideration, leveraging initiatives such as cross functional teams, incentives, training and leadership presence may help improve the success of innovations as well as that demographic factors may not be as significant in these outcomes as some organizations may currently perceive.

This thesis describes how the innovations were identified, what actions were taken within the organization to incorporate them, the perceived and actual results of these innovations, the organizational implications regarding the action research, the author's journey as an action researcher and the overall impact on both myself as a researcher and a practitioner as well as the impact of my research and professional growth on my organization.

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Chapter 1 Introduction

1.0 What Sparked My Research Interest in Innovation and its Perceived and Actual Outcomes

I have long been interested in the concept of innovation and the outcomes of innovation, both perceived and actual. I can trace this interest back several decades to when I read a book which chronicled the industrial revolution's quest for lower costs and discussed how one innovation became dominant and set the bar for the next innovation (Utterbrook, 1994). This dominance was established through the immensely successful outcomes that the innovation created for the organizations that led it. The book discussed individual and public perceptions of certain innovations as well as the measured impact of these innovations on organizations.

From this book, I understood that outside disruptors could come into an industry and could afford to take more risks as they had no infrastructure, history or status quo to defend. Industry insiders, on the other hand, might be slower to mobilize and innovate for these same reasons. These insiders might have currently good results and feel that innovation is not necessary or individuals within an organization might not share a positive perception of the innovation outcomes. Utterbrook (1994) noted that these tendencies could cause the industry insider to spiral into organizational oblivion. If an organization could not or would not create successful innovation outcomes for themselves and looked only within their immediate sphere of influence for innovation it would eventually decline. At the end of the book, almost 300 pages, the author concluded that there is no real repeatable pattern that could be identified as to why some organizations were able to create successful innovation outcomes while others failed to do so. In my mind this meant that there were no steps nor templates that could be followed to create successful innovation outcomes as it appeared to occur randomly. The concept of understanding why the perceived and actual outcomes of innovation may vary from successful to unsuccessful within an organization has stayed with me all of these years. I believed then and believe now that if my knowledge in this area could be expanded, I might be able to improve financial return to my organization, improve perceptions of

innovation and help support sustainable prosperity. Not knowing what may enable or disable innovation outcomes is a weak link in my organization's practical understanding of innovation. The following Figure 1 illustrates the necessary link of understanding that is I believe is required within my organization to understand how to better enable successful innovation outcomes. To do this we must consider both business outcomes and individual perceptions of innovation.

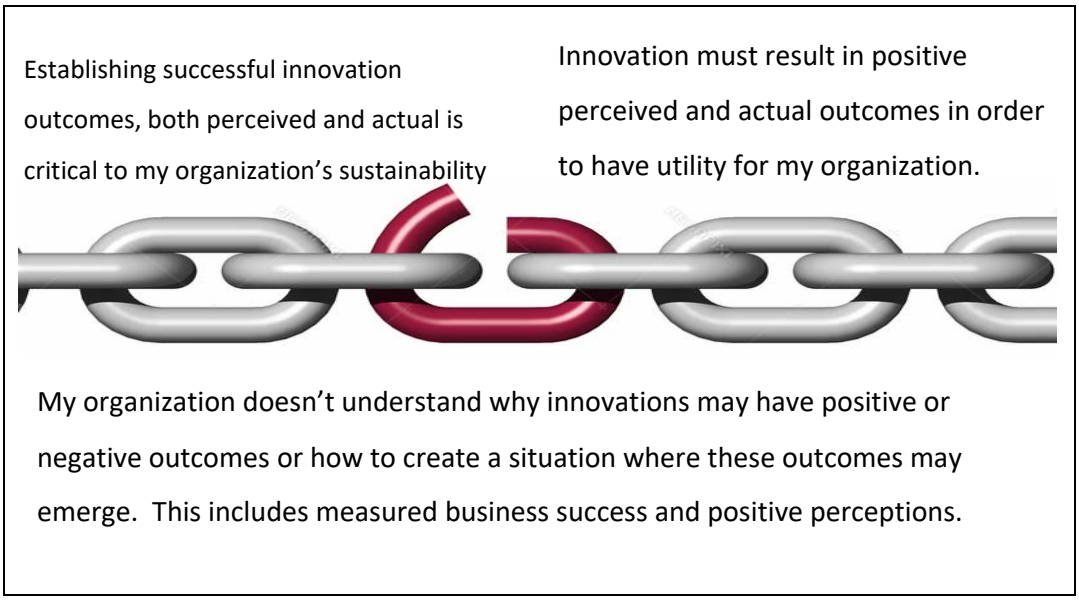


Figure 1 The weak link of innovation is not knowing why it may have variable outcomes from both a business outcome and individual perception perspective

1.1 My Practical Experience with Innovation Outcomes

Now that I have worked in industry for a number of decades, I have both witnessed and participated in a cycle of mixed innovation outcomes and found Utterbrook's (1994) writings come to life in my practical circumstances. I have watched my organizations conceive, plan and launch innovation with mixed results from both a financial return and individual perception. Sometimes the innovation would have a positive business outcome, a notion Govindarajan and Trimble (2010) define as innovation that creates the intended results, and other times it would not. Sometimes an innovation would be perceived as a favourable outcome, which D'este et. al (2012) describe as key to successful business outcomes and sometimes it would not. Over my career I have seen innovations requiring millions of investment dollars being implemented only to be met with negative outcomes. In organizational

terms this meant failure to deliver the desired return. In individual terms, this meant negative individual perceptions and/or a lack of engagement with the innovation. In other cases, I have been part of innovation programs that have resulted in very successful outcomes. There never appeared to be a commonality among the outcome of the innovations that could be attributed to certain factors or conditions. D'este et al (2012) discussed this as a reliability factor for innovation outcomes that could not be replicated in the future.

As a marketer, my currency is innovation: new ideas, new technologies, new concepts, new products and new approaches. The harsh reality of business is that if I am not able to consistently create positive outcomes with these types of innovation within my organization, I will not be able to sustain my career. My organization is very innovation-minded and as a leader within my firm I continue to be involved in a continuous cycle of innovation, from ideation to implementation to outcome. This process often requires significant time, finances and resources, and in my organization like many others I believe, these resources are finite. Because the innovations that we have implemented have met with varying outcomes, the deployments are always followed by discussions to analyse why some innovations had positive business outcomes and/or positive individual perceptions, while others had not. As examples, I have seen innovative products launched with positive perceived and business outcomes on the west coast of Canada, but not on the east coast of the same country. I have seen sales force automation systems implemented and then negatively perceived by a longer tenured workforce, while perceived favourably by newer associates. I have launched innovative marketing programs which were rapidly embraced by the front-line workforce and yet did not yield the desired business outcomes. Overall, innovations would be launched without successful outcomes and it would be very difficult to understand why. All of these outcomes were measured by business metrics (margin, sales increases, etc.) and by individual perceptions of the innovation and the reasons for the variability in these outcomes were elusive. My experience with unpredictable innovation outcomes was the catalyst for my thesis research: I wanted to gain a better understanding of

conditions that might be associated with successful outcomes of innovation (Gupta, 2011; Frambach and Schillewaert, 2002; Pullig, 2002).

1.2 Not Alone in Needing a Better Understanding of what Factors may be Associated with Innovation Outcomes

After working in industry for almost 30 years, I became aware that many organizations grapple with the same problems with innovation: the inability to understand what may be associated with the outcomes of innovation. This helped me to understand that this was not something dysfunctional or unique to only my organization and validated my thinking that this was a problem worthy of study. I have seen many different kinds of organizations launch innovation and be met with unpredictable results. I have seen colleagues being terminated from their positions due to their innovation efforts not achieving the outcomes that their organizations expected. Profits have risen or dropped and lives have been changed for the better and worse, and all based on the results of the outcome of an innovation. There are many examples of this phenomenon within my industry with organizations with which I worked directly. One very high profile and highly documented example that is in the public domain involved a global, Fortune 100 consumer packaged goods company, Hershey Foods (Gross, 2011). I worked closely with Hershey Foods as it launched an enterprise-wide technological innovation (SAP) which was intended to elevate all elements of their business: supply chain, operations, sales, finance and human resources. This was a multi-million dollar endeavour, the successful outcome of which was to be measured in terms of a return on investment in the billions of dollars as well as an intention by its sales associates to reliably utilize the innovation. This innovation required three years to implement. When the outcome was evaluated at the end of this period, it was a failure in both business metrics and individual perceptions. The innovation was eschewed by the company's associates in Europe and accepted in North America. It was found to be culturally inappropriate for other geographies and the organization's workers felt that they had received inadequate and untimely communication and training. Each quarterly earnings call was met with declining financials. Eventually the entire management team was eliminated and the organization underwent massive layoffs. In the end, this highly

esteemed organization could not deliver its signature products (Hershey Kisses™) during its critical holiday period which was a $100 million dollar order. The company stock dipped eight percent.

This dramatic and very publicly documented example of a very poor outcome of innovation served as a cautionary tale for me as I thought about innovation within my own organization and how important it is to create successful outcomes, both perceived and measured against organizational indicators of success.

1.3 The Innovation Imperative: Why we need to Better Understand what Factors may be Associated with Positive Innovation Outcomes

In addition to my practical experience described above, there is much in the literature which urges us to move toward a better understanding of what may impact innovation outcomes. Insights gained from the literature will be further explored in Chapter 2.

The act of innovating has associated expense, time and other demands (Rogers, 2003) within the already resource-strapped environment of my business. Failing to create positive outcomes from these innovations may then create additional expenses or profit shortfalls. This may then have a serious impact on my organization's bottom line (Shaffer, 2014). Based on my practical experience, I believe that it is imperative that my organization gain a better understanding of what factors may be associated with positive outcomes of innovation. My thesis will examine factors that may be associated with both individual perceptions and actual business results of innovation outcomes including my own practical experience as well as those presented in the academic literature, drawing particularly on Pullig et al. (2002) which I also expand upon in Chapter 2.

1.4. The Practical Backdrop for my Research

My current practice is within the Canadian foodservice distribution. Foodservice distributors need to find methods of going to market in more efficient ways and to differentiate themselves from competitors. Gaining an understanding of what will

help enable positive outcomes from innovation may aid my organization's competitiveness, differential advantage and sustainable success.

1.4.1 What is the Foodservice Industry?

Foodservice wholesale distribution is a sector that, at its most rudimentary level, provides a logistics service which moves food and related products between points of manufacturing to points of commercial consumption. At its most sophisticated level a foodservice distributor is a full service marketing and sales consultancy agency for its clients (who are predominantly foodservice operators) through value added services. The food distribution industry has existed in some form since the first commercial meals away from home were consumed and exists worldwide with very similar business models.

1.4.2 Innovation within Foodservice Companies

While my organization is a food company, it is also an innovation company with many sophisticated innovations such as automated inventory control systems, GPS-enabled trucks, satellite-controlled thermostats and multiple-zoned refrigerated units. Sales force automation systems, customer relationship management software and real-time, online ordering interfaces are all basic requirements for my organization to compete in the foodservice industry.

Ensuring safety within the food supply chain during times of crisis creates additional requirements for innovation (Komitopoulou, 2016). These forces combine to place increasing pressure on organizations within this marketplace to accelerate innovation in order to stay ahead of their competition. To not continually seek ways to accelerate successful innovation outcomes within the foodservice sector means that a distributor might not be able to provide necessary sustenance to Canadians during times of turbulence. For these reasons, there should be vested interest for foodservice leaders within my organization to understand what factors may be associated with perceived and actual positive outcomes of innovation efforts within their organizations.

1.4.3 Unique Characteristics of Canadian Foodservice Industry

The Canadian foodservice market in particular, presents some unique characteristics, including the fact that it is a highly competitive and low margin endeavour. Market consolidation within the foodservice segment in Canada has created a two-tier marketplace with a handful of sophisticated organizations at the top, and smaller, less complex distributors existing on a second tier (Foodservice Facts, 2015). There are virtually no barriers to entry to the marketplace, as anyone with transportation can provide some basic level of products and distribution services to food operators. These "disruptors" are able to enter with innovative products, services, processes or technologies much infrastructure investment. As a result, each organization within the industry including my own needs to try to stay ahead of its competition and to differentiate itself in a crowded and competitive marketplace.

The geographic expanse of Canada creates a lower density of foodservice establishments and greater distances between delivery stops which mean that to stay ahead of one's competitors and remain price competitive, distributors need to consolidate more products and shipments on one delivery truck and harness any innovation to create a competitive advantage. Weather and climate issues also can wreak havoc on the foodservice distribution model with frequent snow storms and power outages which necessitate enhanced transportation technologies, innovative emergency processes and a greater reliance on technology to stay in touch with customers.

1.4.3.1 Economics and Urgency

The foodservice sector is one of the backbones of the Canadian economy representing $575B in sales, providing 1.2 million jobs and serving as the fourth largest employer in Canada, behind retail, construction and manufacturing (Foodservice Facts, 2015). The industry also has the significant responsibility to feed Canadians, whether it be as part of circumstances (military, hospitals, nursing homes, schools) or part of social rituals (hotels, restaurants). Foodservice is deemed an essential service by the Government of Canada which means that it is a sector that must continue working and providing service during times of environmental,

economic or political upheaval (Government of Canada, 2013). As such, primary foodservice distributors have backup generators and are provided additional security by the government and given preferential access to certain support resources during times of turbulence. This is a critical sector that must continue to not only operate, but also to innovate, in order to continue feeding Canadians.

1.4.4 To Innovate is Not Enough

Innovation on its own will not help my organization accomplish its goals. Innovation must lead to successful outcomes at both organizational and individual perception levels for my firm (Pullig et al., 2002). To simply deploy an innovation does not mean that an individual will continue to use an innovation or have a positive perception about the innovation. Nor does the existence of an innovation mean that my organization will realize positive business outcomes. Shaw and Burgess (2013) stated that positive innovation outcomes may be measured by continuous utilization and embedment of the innovation within both individual and organizational routines. This thesis will examine an individual's intention to continue to utilize an innovation as one form of an individual's perception of successful outcome of an innovation. Successful outcomes may also be measured with business metrics which are stated in advance (Shaw and Burgess, 2013). This thesis has captured the business objectives of six innovations within my company prior to the implementation stage, and the outcomes will be compared against these goals over a three year period. The business objectives for the studied innovations within my research are outlined in Chapter 4. Outcomes of innovation will be measured both through individual perceptions and business outcomes.

1.5 Practical and Theoretical Foundation of Successful Innovation Outcomes

This thesis uses terms like "innovation" and "outcomes" and "successful" in ways that matter to practical organizations like mine as well as the individuals who work within it. While these terms are used frequently within my organization, the literature review will ground these terms with a theoretical foundation and create a

bridge between the academic and practical worlds. Additionally, business definitions and data sources are defined in Chapter 4.

I have established that creating both successful perceptions toward innovation outcomes and measurable business outcomes of innovation is vital for the success of businesses in today's competitive environment and critical for my organization specifically. Given the rapidly changing economy, accelerating technological environment and global competition I believe it has become even more critical for innovation to lead to successful outcomes. Innovation is often undertaken to create lower costs, enhanced margins, increased sales and competitive advantage (Camison and Villar-Lopez, 2014). Innovation may also help to further commercial key performance indicators (KPI) such as growing profitable sales, gaining competitive advantage, or reducing costs (Becker et al, 2009). In my research I will investigate standard business metrics as they pertain to innovation outcomes within my organization as well as individual perceptions toward those innovations. These indicators and their definitions are outlined in Chapter 4.

1.6 Purpose and Significance of this Action Research

The timeless adage "Innovate or die" was popularized by Peter Drucker (Ignatius, 2014) and helps epitomize the urgency for my thesis. My research, however, takes it a step further to say that to simply innovate is not enough so I have coined a new adage: "Innovate with successful outcomes, or die". Without continuous innovation that leads to successful outcomes, organizational obsolescence is a likely outcome (Dejong and Marsili, 2006). My research purpose is to help my organization be able to identify what factors may support successful innovation outcomes from both an organizational and an individual perspective.

My thesis can be described in three phases, each related to my research purpose:

Phase 1: I drew upon the scholarly literature to frame my research and understand my findings. This exploration of the literature regarding innovation helped me to

gain a better understanding of enabling factors and theoretical terms which helped to ground my thesis in a scholarly approach.

Phase 2: Through a quantitative study, my research examined innovation and its outcomes within my own organization to better understand how to create an environment that may enable successful outcomes both perceptual and as defined by the organization's performance indicators for successful innovation. I studied factors such as age, tenure, gender and structure to understand how these factors may enable or disable successful innovation outcomes. I examined the role that training and communication may play in innovation outcomes. Through the utilization of data collection within my organization, the purpose of my research was to:

- Better understand the factors which may enable successful innovation outcomes
    - This is a critical area of investigation as introducing and ensuring successful innovation outcomes could ultimately enable organizations to improve customer retention, customer penetration and sustained profitability.
- Seek an understanding through the individual perceptions of my organization's sales associates as well as through the lens of business goals.

Phase 3: Thirdly, my thesis then discusses how this research was put into action, within my own organization. The goal of this phase was to:

- Provide insights to my organization to better support movement toward successful innovation outcomes and create practical business benefits
    - By leveraging the insights gleaned from this research, the leaders of my organization may be able to better allocate the required resources to derive the desired return on investment.

- I used the key understandings from my survey in a real-life, real-time innovation to better understand if the knowledge gained through my survey may help enable successful innovation outcomes for my organization
- This phase of my thesis is described in Chapter 7 and demonstrates how developing a better understanding of the factors which may create a favourable environment to enable successful innovation outcomes is of interest to my organization. Leaders, middle managers and front-line staff within my organization all had a vested interest in my research and I will share the practical application of this research.

These phases will be explored through research questions which are described in the next section.

1.7 Research Questions

I have discussed how successful innovation outcomes are critical for the success of my organization and have shared real world examples where organizations have suffered significant financial and opportunity losses by not being able to consistently create successful innovation outcomes. Within my organization, I have participated in many boardroom meetings during the post-mortem of the innovation and measurement of outcomes. We have celebrated instances where we believed innovations had successful outcomes and we have also lamented the fact that some innovations have failed. During these meetings, blame is sometimes assigned and fingers might be pointed, and there has been an earnest attempt to discover what went wrong.

Clearly, a more constructive approach is required to allow for critical reflection and the productive inquiry into what may enable successful innovation outcomes for my organization. My research questions have emerged from my research purpose which was described earlier in Section 1.6.

Research Question 1 (RQ1): What factors may be associated with successful innovation outcomes within my organization?

Research Question 2 (RQ2): What actions could my organization put into place to help improve the success of innovation outcomes?

These research questions formed the basis for my research with factors and actions emerging from my literature review. These aspects are discussed further in Chapter 2 as my research questions become grounded in scholarly knowledge. RQ1 is explored through the quantitative study described in Chapter 4 with a subset of empirical research questions. These empirical research questions are described in the below section. RQ2 is explored in Chapter 7 as I put my research into action within my own organization and discuss the results.

In the following section I will list my specific empirical research questions within the practical context of my organization. Learning the answers to these empirical research questions may help equip my organization's teams with the tools necessary to help improve the success of innovation outcomes and create an environment conducive for consistently successful innovation outcomes in the future.

1.7.1 Empirical Research Questions

Here, I want to demonstrate how these empirical research questions emerged from my practical environment. These empirical research questions will also be explored through the literature review in Chapter 2 and investigated through my quantitative research which is described in Chapter 4. Research Question 2 is discussed in Chapter 7.

Empirical Research Question #1: How do demographic factors such as age, tenure, gender relate to an individual's perception of an innovation outcome?

My organization is heavily skewed male at all levels in our organization. Oftentimes during our post-innovation process debrief when we are discussing why innovations have not led to successful outcomes, I have wondered if there is something gender-

specific about the training or the communication or the environment which may be associated with males or females to have different perceptions about the success of innovation outcomes. Better understanding if gender differences exist may help my organization in communicationg innovations and looking at participant groups with greater understanding.

Empirical Research Question #2: What factors do sales people perceive may be associated with successful innovation outcomes?

There are a number of factors which may be important to learn about when it pertains to successful innovation outcomes. Incentives, training, leadership coaching, support, trust, competitive differentiation and customer focus are all some of these factors which appear in the literature as potential links to successful innovation outcomes. I would like to learn more about perspectives from sales associates as to which factors they feel may improve the success of innovation outcomes. I explore these factors further in the literature review, particularly with Pullig et al. (2002). Knowing the answer to this question would be a great assist to my organization as this knowledge could provide clues that may help improve the success of innovation outcomes and provide increased return on investment. This may also allow my organization to be faster to market to let us gain leverage on innovations more quickly.

Empirical Research Question #3: How does perceived success of innovation outcomes relate to business measures of innovation success?

My organization has metrics for knowing whether an innovation has generated successful outcomes. As a businessperson, however, I know that individual perception may sometimes vary from business outcomes. I would like to understand if there is any association between an individual perceiving that an innovation is successful and the innovation actually delivering successful outcomes in business terms. This may be useful from gauging whether an innovation may ultimately be successful and/or to help position innovations with individual stakeholders.

Empirical Research Question #4: What role do increased sales results play in an individual's perception of successful innovation outcomes?

One definition that will be presented in the literature review states that successful innovation outcomes may be measured by continued utilization of an innovation (Govindarajan and Trimble (2010). Through my research I would like to learn whether experiencing increased sales results may be related to a sales associate continuing to utilize an innovation. It makes sense that knowing "what's in it for me" and realizing tangible benefits would make a sales associate more engaged in utilizing the innovation and vice versa. Each of the innovations being explored in this research has a potential positive financial outcome for a sales associate. I would like to know that if a sales associate realizes that they have had increased sales benefits from the innovation, will s/he be more likely to continue to use it, delivering a successful outcome for both themselves and the organization.

Empirical Research Question #5: What association do cross-functional or business transformation teams have on both an individual's perception and an organization's measurement of successful innovation outcomes?

Within my organization, some innovation activities have utilized a business transformation team which is a cross-functional team comprising subject matter experts from sales, IT, human resources, merchandising, marketing, finance and operations. This team is responsible for working with sales associates to launch and stabilize innovations. These teams travel across the organization and are held accountable for the outcomes that will be delivered by the innovations, in concert with the sales associate teams. These teams are costly and not widely utilized. The teams build credibility and serve as innovation coaches for the sales associates. Intuitively I believe that having this cross-functional team of subject matter experts working on the front line with sales associates to implement innovation may yield more successful outcomes. As some of my studied innovations have been implemented with a business transformation team, and some have not, I would like to understand whether there are differences in the outcomes (individually perceived and real organizational metrics) of innovation.

1.8 Action Research

My research is action research, meaning that it is taking place within my own organization based on a problem that I see every day and would like to better understand. My research has taken place within a cycle of planning, acting, observing and reflecting. My action research journey is illustrated in Figure 2.

Figure 2 My Action Research Journey

I was very fortunate that innovations were being implemented or had just been implemented within my organization during the time period of my research and I was able to be in very close proximity to both the innovations and the outcomes from these innovations. This was particularly true and exciting during my exploration of RQ2 as I implemented findings from my quantitative study with an innovation which was being implemented real-time. This phase is described in Chapter 7.

1.9 Structure of Thesis

This thesis captures my journey as an action researcher, from my initial research curiosity to a review of the literature, to a quantitative research effort within my

organization, analysing the large volume of data returned to discussing the practical implications of this research and then finally, bringing understandings back to my organization to make sense of the findings. I then put together a plan that could be used within my company with the goal of enabling more successful outcomes for innovations.

The purpose of **Chapter 1** is to tell the story of my research interest and why I think it is important. It explains the impact to my practice, the motivation behind my research inquiry, describes the practical problem that my organization experiences with innovation outcomes and presents my research questions to be explored in my research. The chapter introduces my purpose, my research questions and the empirical research questions that I will investigate through the quantitative survey. This chapter also describes the benefit of the research to my organization and outlines the structure of my thesis.

Following this introductory chapter, **Chapter 2** defines basic terms and presents a summary of the literature review conducted as it pertains to my thesis. It defines what innovation means, defines what success looks like for innovation outcomes and dives into the literature in areas relevant to my research questions which are described in Chapter 1.

Chapter 3 is the first of a three part discussion of my methodology. This chapter discusses the structure of my action research including my research philosophy, my action research approach including my reflective practice and also outlines how I intend to put my research into action within my own organization.

Chapter 4 continues to discuss my methodological approach and focuses on the survey that I use to explore my RQ1 using empirical research: What factors may be associated with both perceived and actual successful innovation outcomes within my organization? This chapter examines how I went about investigating my research questions and the methodological approach for the investigation. It explains the

innovations which I chose to investigate in this investigation, and why. It explains why I chose a survey of my front-line sales force, how I sampled my participants and my approach to analyse the resultant data.

Chapter 5 contains the results which were obtained from my survey of my organization's front line sales force with descriptive, correlative and inferential analysis**.** I relate the results back to the empirical research questions.

Chapter 6 provides a discussion of the results which I described in Chapter 5. It discusses the practical implications of the findings for my organization. There are findings at both the individual level and the organizational level, and this chapter discusses the practical implications for individuals, managers, leaders and my overall organization. At the conclusion of this chapter, I create a table of key understandings which explains the major findings that are of importance to my organization and why.

Chapter 7 puts my research further into action within my organization. It describes the methodology that I employed to answer RQ2: What actions could my organization put into place to help improve the success of innovation outcomes? It also describes what happened when I brought my findings back into my practice as part of my action learning process. It discusses how the results of the research were then applied within my organization and the observed outcome of these new innovations being implemented. It also examines the shift that occurred within my organization as the result of my action research.

Chapter 8 concludes my thesis and discusses the limitations of my research and outlines some considerations for future research as the next phase of the action learning cycle. Most importantly I also discuss my journey as a reflexive action researcher and how my actions and reflexive practice have shaped both myself and my organization. This chapter concludes this leg of my scholar-practitioner journey with a look backward with gained wisdom and a look forward with hope and optimism.

Chapter 2 Literature Review

2.0 Introduction

While innovation is imperative if organizations are to survive and thrive, how well an organization innovates in terms of positive outcomes is the determinate for organizational success. This represents my research's central scope: innovation is not enough, it must generate successful outcomes through positive business metrics and ideally positive individual perceptions in order to make a positive difference to my organization. How to improve the success of innovation outcomes is the question that I am researching to better understand.

My organization has failed to consistently achieve successful outcomes from its innovation efforts which often leave the anticipated benefits of innovation unrealized. Such failure has been measured by poor business outcomes or poor individual perceptions, or both. This may be attributable to the factors and environment which surround the innovation and not failure of the innovation (Klein and Knight, 2005, p.244). Falling short of anticipated positive business outcomes creates practical urgency to understand factors which may support successful innovation outcomes.

This literature review strives to focus on understanding why innovation outcomes vary between success and failure and also ensure that my practical research is grounded in the literature. This review defines what innovation is, what both perceived and practical successful innovation outcomes look like and explores factors which may be associated with successful innovation outcomes within organizations. It distinguishes between the various stages of innovation from adoption to execution endpoint. It also connects the business concepts which are being explored during the research phase to the academic literature to build a bridge between the scholarly and practical worlds. The goal of this literature review is to create a scholarly foundation for my thesis and to inform the methods I use. It is also intended to synthesize some key aspects of the scholarly literature to help inform

my organization as it works to create successful innovation outcomes on both an organizational results level and an individually perceived levels.

2.1 What is Innovation? Theoretical Framework for Practical Study

The definition of innovation is broad and well documented in the academic literature, although the term is often mistakenly interchanged with anything that is technology-based. In reality, innovation can take on many different forms that are not at all related to technology. Innovation may be defined as a new idea, method or device (Camison and Villar-Lopez, 2014) or the process of introducing these new ideas, devices or methods (Merriam Webster, 2014). I have included this philosophy in my research: innovation can be both a noun and a verb.

Schumpeter (2008) divides innovation into five classifications: i) new methods of production; ii) new products; iii) new marketplaces; iv) new supply chain; v) new organization. All of these innovation classifications are studied within this thesis. My research examines various types of innovation including process, product, practice and system-related innovation.

Pullig et al. (2002) define innovation as a product, concept or process that is considered to be novel by an organization. By this definition, an innovation could comprise services, products, systems, practices, ideas that could be generated internally or externally to the organization. Lofsten (2014) supports the position that innovation may take many forms but ultimately its innovativeness is determined by the perception of those who must interact with it. This is why we ask participants in this research for their perceptions of the innovations which have been implemented within their organization. In practical settings, perception can be more powerful than reality. Luecke and Katz (2003) provide further support in their acknowledgement that innovation comprises the actual manifestation and assimilation of newness. It is this assimilation that really gets to the heart of an individual's perception of successful innovation outcomes as it speaks to entrenchment and utilization of the innovation.

Thus, innovation comprises three interrelated elements: something that is novel, something that is process related and something that needs to be implemented. The novel nature of innovation indicates that it does not necessarily need to be new to the world, but just new to the entity that is discovering it for the first time. Within my organization this means that it could be new to an individual, new to an organization or new to a particular geography. For example, there may be an innovation introduced within my organization which is commonplace in other organizations or industries and for associates who have joined my organization from these other areas may find the innovation very commonplace. This is also one reason why my study of multiple innovation in the course of this research is so important.

Damanpour and Evan (1984) differentiate innovations from inventions by positing that innovation only occurs when there is a measurable outcome. Otherwise, it remains an invention (of word, product or process). The importance of measurement is highlighted in my research as I use both business measurements and quantitative research measurement to better understand associations which may exist with successful innovation outcomes. This measurement of both individual perceptions and actual business outcomes against established performance metrics helps to more holistically evaluate the success of innovation outcomes.

2.2 What Leads to Outcomes? The Stages of Innovation

Within organizations, the adoption process comprises stages that typically must be passed by individuals. A common theme in the literature on innovation is innovation diffusion which examines the proliferation of innovation once launched. Innovation diffusion was originally thought to be a function of volume (Tarde, 1903; Tarde, 1969) in that the more innovation that is implemented, the greater the chance of some being implemented successfully. Rogers' seminal research (2003) amalgamated many different studies to create an aggregated understanding of diffusion theory. As one of the first researchers to consider innovation as a standalone research subject, Rogers (2003) examined the stages of innovation from adoption to outcome endpoint. While my thesis studies the outcomes of innovation

which is the last stage in Rogers' model, the outcomes rely on what occurs during the stages leading up to these outcomes.

2.2.1 Adoption

Innovation adoption refers to the actual decision that is made to embrace a new practice or product. It captures the need of organizations to be disruptive to move products, services, processes and ideas forward into the future (Brands, 2015). My research asserts that adoption is not enough, however and that the key to innovation success depends on how well or poorly the newly ideated innovation is implemented, and how it moves through the adoption gate building a culture and environment that sustains this innovation through ongoing enabling mechanisms. Innovation may generate successful outcomes if its every aspect promotes and features creativity, engagement and change acceptance. Satisfying these requirements occurs in the pre-implementation process climate reinforced through the adoption and subsequent diffusion. Fixsen et al. (2005) found adoption begins with the recognition of existing needs and moving toward searching for solutions. According to Rogers (2003), adoption involves deciding on fully using innovation as "the best action course available" (p. 177). Subsequent studies regarding innovation show an inclusive process comprising decisions initializing adoption of solutions and final decisions to proceed with implementing the solutions (Wallace et al., 2009). In Chapter 1 I discussed how the process occurs within my organization as decision makers may view innovation as a means to overcome challenges or resolve competitive disadvantages. What is occurring organically within my organization is described in the scholarly works of Wallace et al (2009).

While research, analysis and planning are essential components of the innovation adoption stage they also may also work against successful innovation outcomes on both an indivudal's perceived and an organizational results level. For example, in large organizations such as mine, there are often multiple stakeholders involved which may result in misalignment making it difficult to successfully implement the innovation resulting in missed business opportunities (Fang et al., 2011). What may happen is that my organization may put in place stages of analysis and planning at

the beginning of any large project such as implementing an innovation. These stages may become routinized and multiple stakeholders may move through these routines without really accepting or endorsing them. Implementing the innovation should provide the transition period that an organization might need so that its workers become increasingly skilfull, committed and consistent in the use of the innovation (Enz, 2012). In doing so, routine application of innovation becomes the critical gateway between adopting and successfully implementing the innovation.

The seamless transition between innovation adoption and innovation diffusion requires a harmony of organizational and social factors. This involves mutually supportive platforms capable of translating research into successful practice improvements (Aarons et al., 2011).

2.2.2 Diffusion

Rogers (2003) regards diffusion of innovation as a process to communicate innovation through formal and informal channels over time to all members of the organization (Rogers, 2003). This definition asserts that uncertainty for changes occurring in the organization due to innovation can be mitigated through effective communication during the diffusion stage (Rogers, 2003, p. 436). Diffusion also requires time and collaboration between integrated units for innovation to be seeded successfully within the organization (Rogers, 2003, p. 24). Schumpeter (2008) supported this approach with the assertion that innovation diffuses exponentially, beginning in just one small area and then spreading to a larger area.

2.2.3 Implementation

While understanding the journey of innovation that leads to measurable outcomes is important, many organizations overlook the complexity involved in ensuring successful outcomes. Although adoption and diffusion are integral innovation components, implementation processes and practices are key to successful innovation outcomes. Since innovation involves a complex process featuring multiple inputs and outputs, I posit that it is necessary to configure appropriate implementation strategies in order to achieve successful innovation outcomes. The

key to innovation success depends on how well innovation is implemented out of the adoption gate and how effectively a supportive culture and environment are nurtured to sustain ongoing routinization and institutionalization of the innovation. From the Rogers (2003) innovation-decision model, the implementation stage involves putting into practice the adopted and diffused innovation. Although all stages mark progressive steps toward successful innovation outcomes for both individual perceptions and organizational outcomes, they may overlook the positive differences that a nurturing implementation culture can make on these outcomes. Typically, innovations fail during implementation in organizations lacking consistency, know-how and support required to accomplish the expected benefits (Klein and Knight, 2005, p. 243).

Rogers (2003) identified factors which could facilitate movement along the adoption curve toward successful innovation outcomes. These include individual knowledge of the facets of the innovation as well as understanding the benefits of implementing the innovation. Workers within organizations may be reluctant to enthusiastically implement innovation unless they understand the characteristics and the tangible benefits that it delivers both for them and for the organization. Innovation alone will not necessarily provide benefits as it needs to be implemented successfully throughout the organization in order for the benefits to be realized. This reinforces the need to achieve positive individual perceptions of an innovation and its outcomes. If the organization's citizens understand benefits as they relate to individual circumstances the system-wide outcomes are more apt to be successful (Erffmeyer and Johnson, 2001). System-wide outcomes may be measured through actual business results against established performance metrics. In practical terms, for any organizational stakeholder the answer to the "what's in it for me" question must be clear and understandable. This means that any individual who is involved with the innovation must be able to understand the potential benefits of the innovation. If the individual is responsible for leading the innovation then they must be able to explain the benefits. If the individual is responsible for using the

embracing the innovation, then they must understand the benefits that they may individually realize or that the organization may realize from the innovation.

2.3 Risks of Not Realizing Perceived Successful Innovation Outcomes

If successful innovation outcomes do not occur, both the organization and the individual may become frustrated with innovation in all facets: ideation, the process of innovating and the process of implementing (Unsworth et al, 2012). This in turn may create an organizational culture of non-innovation as organizations and the individuals who work within them shy away from the pain of innovation because they fear unsuccessful outcomes.

Over 50% of attempts to innovate result in unsuccessful outcomes and this rate can actually be as high as 80% (Baer and Frese, 2003; Bush et al., 2007; Petersen, 1997; Kaydo, 1999). For my organization, this can be quite costly given that our innovation budgets may be around $10M with annual operating budgets of $3M (Sibel and Malone, 1996). While risk and reward may vary by type of innovation, type of organization and type of industry, unsuccessful outcomes may still represent a significant failure of investment as well as the opportunity cost of training and loss of productivity. Klein (2005) states that unsuccessful innovation outcomes are often due to the inability to gain informed, consistent and committed use of the innovation. In my research I will examine a sales associate's likelihood of interacting with the innovation and/or encouraging his/her customer to interact with the innovation as an overall perception barometer.

When innovation results in unsuccessful outcomes, it is not uncommon for an organization to blame this failure on the innovation rather than the environment or manner in which it was implemented or the individuals who are using it (Keillor et al. 1997). For example within my organization, when a sales commission program was deployed and deemed unsuccessful, fault was assigned to the actual program. There was not a great deal of reflection as to the environment in which this program was deployed. Similar themes were found in the literature, where organizations blamed an inefficient process (Gatignon and Robertson, 1989) or problematic technology

(Gohmann et al., 2005). Gatignon and Robertson (1989) remind us that sales-related innovation may have the most significant outcome on sales force performance (Keillor et al., 1997). Parthasarathy and Sohl, (1997) emphasize factors within organizations that may lead to sustained and effective innovation outcomes as measured by enhanced organizational performance. Marino (1982), Klein (2005) and the seminal works of Zaltman et al. (1973) examine the myriad reasons for innovation outcome failures and modelling for empirical investigations.

Due to the potentially significant risks of unsuccessful innovation, I feel it may be beneficial to conduct additional research in this area. My food organization is rich with innovation projects as it is consistently looking to create efficiencies and differentiation in a competitive and minimally profitable marketplace.

For my organization, this would have disastrous consequences due to the urgent requirement of accelerated innovation within our industry and I believe that over time this would put my organization into a downward spiral leading to its eventual decline. This inertia of innovation (Shaffer, 2014) means that an organization that is reluctant to innovate will stagnate until extinction. While this is an extreme scholarly model, it can be put in simple terms for my organization: we need to create strategies which will produce successful outcomes from our innovations. This will create meaningful business results and allow us to continue to grow in a sustained manner. In the next section I will explore what it means to be successful with innovations as well as the conditions which may be conducive to these outcomes.

2.4 Defining Success for Innovation Outcomes in the Literature

Within my organization, there is never a shortage of innovative ideas, novel processes and new technologies but this in itself is not useful for advancing our business agenda. With innovation, the ultimate organizational goal and focus needs to be the successful outcome of these innovations (Govindarajan and Trimble, 2005). Without this successful outcome, all of the ideation and effort is for naught. In Chapter 1 I discussed how my certain stakeholders within my organization may crave

newness but then abandon the novelty before there is a chance for it to entrench and product outcomes, successful or otherwise.

The successful outcome of innovation is often determined by using specific and readily calculated business metrics including number of customers, innovations adopted, patents secured, research and development expenditures and stock market value (Fang et al., 2011). Griffith et al. (2006) argued that customer configuration and support assets influence the degree of success for innovation outcomes (p. 490). Simpson et al. (2006) framework of outcomes found increased profitability, employee satisfaction, cost reduction and improved efficiency indicating innovation success (p. 1138). The study of these outcomes, however, missed exploring how operational excellence, employee satisfaction and market advantages are positive outcomes attained from successful outcomes of innovations. With my research I focus on measurable performance metrics to explore the ultimate organizational goal.

When investing in innovation, soundly managed organizations such as my own have outcome metrics which define success. In practical terms, these metrics are often reflected in business metrics such as a return on investment figure measured by expense reduction, gross profit improvement, associate retention and other quantifiable metrics which can be benchmarked (Gaynor, 2002). I explore and define the business metrics that my organization uses in Chapter 4 to outline how my organization may measure success. Glor (2014) discusses that not only is innovation a requirement for an organization's long-term sustainability, but that the ability to conceptualize and measure successful innovation outcomes is vital. Without a measure of success, an organization will never understand what innovation methodology can be used for successful outcomes, and that many resources may be wasted without this rigour. Within my organization the imperative for precise measurement of success is high: with thin margins and increasing competitive pressures, a miscalculation of success measurements may result in negative financial implications.

2.4.1 Successful Business Outcomes of Innovation

As with most business decisions, the financial impacts of innovation must be considered when evaluating outcomes. Day (1994) suggests that organizations first identify the spanning points which may be associated with successful or unsuccessful innovation outcomes. The spanning points or touch points of an organization refer to all interconnections between constituents related to the organization such as the customer, competitors, suppliers and regulatory boards. For each of these touch points, there should be an understood benefit that is empirically supported and often financial in nature. For example, service-process-related innovation may increase accountability and a sense of ownership (Keillor et al., 1997). This, in turn, may create enhanced employee satisfaction which increases employee-retention, helping to decrease the cost of employee turnover.

For some organizations, innovation is viewed as a business opportunity: to grow faster, bigger, more profitable and to outpace one's competitors (Camison and Villar-Lopez, 2014). For other organizations, innovation is actually a business weakness: being undermined by a competitor who is more successful with innovation outcomes than itself (Camison and Villar-Lopez, 2014). For organizations for which this is true, the relative success of innovation outcomes between organizations will also be relevant. If a competitive innovation is not successful, then the incumbent organization may not be at a disadvantage. This means that innovation is not only what will differentiate an organization from its competitors, but also what will drive the prosperity of the organization. In Chapter 1 I discussed how urgent this requirement is for food organizations such as mine (Prajogo and McDermott, 2013) as embracing a culture of successful innovation outcomes supports adequate return on investment in an industry with razor-thin profit margins. This means that taking different approaches to common situations (Shaffer, 2014, 146), improving existing processes, products and systems and anticipating market needs can provide necessary competitive advantage. Being able to realize successful outcomes from innovation efforts is foundational to sustained success within an industry that continues to grow. To implement innovation and fail means significant impact on an

organization's financial return but can also mean additional learning and growth can be realized. To ignore innovation altogether may allow one's competitor to gain the upper hand (Schumpeter, 2008).

2.4.2 Perceiving Successful Innovation Outcomes

Innovation outcomes relative to the selling touch point of the organization is what is being examined in this thesis as I study our sales force and customer-facing innovations. I chose this aspect of innovation because perceived successful innovation outcomes with our sales teams and our customers have the potential to return significant financial benefits in a variety of ways. For example, improved perceptions of credibility with customers (Keillor et al., 1997) may enable a sales associate to further penetrate a customer account. Successful sales-related innovation outcomes may enhance the ability of my organization to provide accurate and timely information to customers (Bondra and Davis, 1996) which in turn, may lead to increased sales or profit margins. Successful sales-related innovation outcomes may make additional information available regarding the competition and the industry, may allow customer feedback to be more readily received and acted upon and may ensure that non-sales-related associates within an organization are more knowledgeable in order to provide support for the sales organization (Ahearne et al, 2005).

With regard to the research conducted in this thesis it is also important to note that, conversely, innovation related to the selling function may also present the most risk due to the fact that it may directly impact transactions or relationships with customers. This caution is supported by Ahearne et al. (2005), who examined the high risk, high-reward nature of evolving innovative communication practices within the sales organization. This lends further urgency to my research. As an example of both the risks and rewards associated with perceived successful innovation outcomes related to my organization's sales teams, sales may increase by 15% to 35% (Uhlaner et al., 2013.) Conversely, if my organization is unable to successfully implement innovation we may find that reduced profits will ensue as we lose our competitive advantage in an already crowded marketplace (Stoneman and Kwon,

1996). Thus, to ensure sustainable profitability for my organization, it may be beneficial to further investigate the factors which may be associated with the successful outcomes of sales-related innovation.

2.4.2.1 Exploring Perceived Success of Innovation Outcomes through Accumulated Utilization

Some research posits that perceived success of innovation outcomes occur when any individual, or collection of individuals decide to utilize an innovation (Gupta, 2011). This is successful as defined by the implementor. This position does not address the staying power of innovation. Govindarajan and Trimble (2010) posit that execution of innovation is the measure of success and state that execution can be measured by utilization of an innovation by an organization. Achieving innovation utilization at the organization level is dependent upon the decisions made at the individual level. This is still not a full measure of perceived success of innovation outcomes from an organizational effectiveness perspective, as while it may require many individuals utilizing the innovation, it still does not demonstrate that critical entrenchment that will provide return to an organization. For example, if an organization's leadership embraces an innovation, this does not mean that it will be utilized successfully and repeatedly. Similarly, if an individual utilizes an innovation, this also does not mean that the innovation will be used successfully and repeatedly.

Shaw and Burgess (2013) believe that perceived success of innovation outcomes should be measured by front-line acceptance and utilization of the innovation. Using this singular measurement as a gauge, the innovation efforts in my experience that were not accepted by the sales associates were generally met with perceptions that the outcomes of the innovation were unsuccessful.

A perception that the outcomes of the innovation were successful means that an organization has continuous, committed and sustained use of the innovation by its planned individual users beyond the initial introduction period (Pullig et al., 2002). The fundamental question is how to measure successful outcomes. Pullig et al. (2002) suggests that perceptions of successful innovation outcomes may be

measured by demonstrated usage which results in fully realized benefits throughout appropriate areas of the organization.

Ideally, to help facilitate perceptions that the outcomes of innovation are successful, both individual and organizational efforts are present and working in concert. Gupta (2011) asserts that perceptions that the outcomes of innovations are successful are only achieved when there is an accumulated level of utilization of innovation within a particular organization. Both of these aspects are studied within my thesis and will be explored in subsequent sections.

2.4.3 Successful Innovation Outcomes and Change Management

Anything novel needs to be considered within the context of change management and this certainly applies to innovation which is, by definition, presenting something novel. The literature in this area is extensive and speaks to the accelerated and urgent environment which exists universally in business today. Euchner (2013) paints a realistic portrait of the ability to implement innovation successfully within the context of change management noting that sometimes organizations implement innovation well, and sometimes they implement innovation poorly and that the difference between the two outcomes often relates to the ability to manage change both at the organizational and individual levels.

Other researchers provide guidance for managing the significant changes that innovation may bring. Creating urgency for the necessary change that will be created by innovation may support individuals in understanding its importance which in turn will help support successful innovation outcomes (Euchner, 2013; Modi, 2011).

Establishing a shared vision from the leadership level can liberate workers within the organization to do whatever it takes to ensure that the changes that are required to support the innovation are made (Euchner, 2013). Organizations that wish to successfully implement innovation need to concentrate on the benefits that it will provide and ensure that all levels of associates within the organization are

supported. This may lead to increased engagement, motivation and security which may help to overcome reluctance or worse, indifference (Euchner, 2013).

From a change management perspective, the rapid pace of new innovative technologies demands persistent and agile strategies to avoid innovation outcome failure (Aiken and Keller, 2009). As organizations strive to implement innovation amid increased external pressure, they must adopt leadership styles which will improve the success of these innovations. Organizational profitability and sustainability are also threatened through margin erosion, lost sales and lack of account penetration. There is significant value in studying these areas so that organizations can concentrate on the areas that may be positively associated with the adoption and successful utilization of innovation and avoid costly failures (Euchner, 2013).

Adoption of innovation and subsequent diffusion within the organization requires promoting changes that potentially disrupt routine practices. This becomes challenging when the decision makers involved perceive changes as causing unnecessary disturbance on organizational functions. Enzi (2012) suggests that these experiences may complicate the innovation implementation processes and impede its successful outcome (p. 189). The body of scholarly work which produces knowledge in the area of change management urges practitioners such as myself to understand the impact of change on people who are charged with implementing innovation and therefore have a role to play in its successful outcomes.

With reference to change theory, Aarons et al. (2011) observed that receptiveness and readiness for change positively relate with the pre-adoption structures and adoption frameworks. Relatively, such preparedness is essential while putting the innovation into practice. The presence of people-related issues makes the process seem an intimidating exercise leading to innovation outcome failure. People-related challenges require patience and structure to combat particularly, having the right people (Enz, 2012, p. 190). Unlike the past where the organizations culture would

eventually shape its people, individuals collectively define the value system. Often, implementing innovations brings changes to the workplace environment that the employees have known and experienced for years. These adjustments bring likely conflict especially where initial propositions turn half-truths leading to high variability of delivery (Enz, 2012). Under such circumstances, there can only be little progress unless the actual innovation structures are understood and aligned. Consequently, the innovation process should include commitment and conditions required to encourage acceptance overcome misunderstanding resistance.

2.4.4 Successful Innovation through Barrier Removal and Business Transformation Teams

A significant theme in the academic research focuses on barriers to innovation within organizations and the use of cross-functional or business transformation teams. This type of team goes by different names in the literature, business transformation team, cross-functional team and more prevalently now agile teams. Regardless of names, a business transformation team is generally comprised of cross-functional subject matter experts with representation from all related disciplines including human resources, finance, communications and technology, in addition to representation from the discipline that may be associated with the outcome of the innovation (Jacoby, 2018). Beaumont et al. (2017) compared organizations which use business transformation teams with organizations that do not use them while deploying innovation. The results showed that using the teams created significantly better performing innovation. Jacoby (2018) asserts that cross-functional teams create more successful innovation than single functional groups as they quickly remove barriers, create more collaboration, insightful dissent and varied proficiencies. Through my research I will seek to understand whether support mechanisms such as business transformation teams could assist with overcoming some of these barriers in order to create successful innovation outcomes. My organization does not currently utilize a business transformation team of any type or name and this is something that I will explore in my research.

D'este et al. (2012) suggest that there are essentially two types of barriers which stand in the way of successful outcomes when organizations work to implement

innovation. One barrier pertains to the actual learning process required to successfully implement innovation. Training and support may help to overcome this barrier (D'este et al., 2012) and this is something that I will explore during my research. The second barrier involves obstacles to organizational commitment to the innovation which may deter successful innovation outcomes. Organizational commitment may take the form of incentives and support (D'este et al., 2012) and will also be explored through my research to understand if there may be an association between this commitment and successful innovation outcomes.

Barker et al. (2009) observe that despite the perceived and tangible business benefits of innovation, the innovation process often fails when the anticipated benefits fail to materialize. This failure to reach potential may stem from low user acceptance driven by the following facets as noted by Barker et al. (2009):

- Disruption of established sales routines
- Sales force perception of innovation as another tool of micromanagement
- Differing expectations of benefits (management vs. front-line sales).

Researchers identify major barriers to successful innovation outcomes, including: 1) perceived reliability of the innovation particularly when technology-based; 2) length and intensity of learning curve; and 3) degree of organizational support provided to associates within the organization (Pourkiani et al., 2013; D'este et al., 2012).

2.4.5 Defining Successful Innovation Outcomes for this thesis research

Having navigated the various definitions of successful innovation outcomes through the literature, I must now clearly define how success is measured within my action research using both perceptions and actual business results (Gumusluoğlu and Arzu, 2009). Successful innovation outcomes are measured twofold within this thesis: through positive individual perceptions of the business outcomes of the innovation implemented by the organization; and through positive results as measured through the business metrics for each innovation established by the organization.

2.5 Enabling Factors and Successful Innovation Outcomes

Implementing innovations with successful outcomes requires identifying and understanding what may improve or what may limit successful innovation outcomes. This does not mean, however that having well aligned enabling factors "guarantees success of placing the program, practice or idea into effective use" (Fixsen et al., 2005, p. 16). Areas to consider include start up and implementation costs, assembling appropriate support systems, ensuring reporting and analytics and the entire human resource framework including training, incentives and change management. Fixsen et al. (2005) suggest that initial complexity of an innovation or situation, along with social stressors, staff turnover, anxious administrations and collegial rivalry may cause innovation outcome failure (Klein, 2005). Fixsen et al. (2005) further suggest that the existence of forces such as fear of change, comfort in status quo and the work involved to realize outcomes of innovation may make the prospect of successful innovation outcomes daunting. This emerges as the organization struggles to understand the decision to adopt the innovations. Macallair and Males (2004) found that successful innovation outcomes may be inhibited when innovation is attempted without "adjusting the supporting functions and roles" (Schroeder, 2011, p. 12). To overcome this, an organization must acknowledge the existence of these factors, understand their potential for recurrence and reinforce the culture of accepting and encouraging disruptions (Brands, 2015, p. 2).

2.5.1 Organizational and Individual Factors Improve both Perceived and Actual Successful Innovation Outcomes

Innovation outcomes take place on both an individual and organizational level and it is a nuanced environment which encompasses the individual decision to adopt, deploy and implement organizational processes (Damanpour and Evan, 1984; Lofsten, 2014) as well as the organizational commitment, environment and support of these processes. Individual factors and organizational factors may be measured differently as they are in my research. In my thesis I measure individual perceptions of innovation outcomes and I also use organizational business metrics to understand innovation outcomes at this more macro level. Combining individual perceptions with organizational outcomes allows me to view innovation outcomes from different

angles and understand associations which may exist between an individual's perception of an innovation's success and an organization's measurement of an innovation's success. Some researchers believe that successful innovation outcomes require organizational and individual elements to work together (Damanpour and Evan, 1984; Gupta, 2011; Lofsten, 2014): an initiation at the organizational level which includes decision-making, evaluation, resource identification and allocation and formation of perceptions; an implementation element at the individual level which includes initial implementation and ideal deployment of the innovation. The implementation or outcome element is the most measurable of the phases, as it represents the overall commitment of both an organization and its associates to the continued use of an innovation (Klein, 2005). In reality, organizations often expend significant resources during this phase with elaborate launches and training efforts and yet still might experience unsuccessful innovation outcomes. This supports the position that successful and sustainable innovation outcomes may require more than just an effective launch phase, but rather, support through each phase of innovation.

Gupta (2011) asserts that to create successful outcomes, innovation requires a defined process which is travelled by an individual moving from awareness of an innovation to shaping a perception of the innovation, to making a decision to accept or reject the innovation. From this point, the individual implements the innovation and then validates the decision. Gupta (2011) aligns with Rogers (2003) in that there are many steps along the stages of innovation which may lead to successful innovation outcomes. Along this path, an individual makes the choice to continue forward through the adoption and execution process, or to stop and revert to the status quo.

The body of empirical research supports the notion that an organization's culture creates the enabling conditions required to either stimulate or inhibit innovation adoption. Deshpande and Webster (1989) also posit that organizational culture encapsulates individual recollection of events, practices, processes and guidelines, and also envelop individual understanding of what behaviours are rewarded and

expected vs. what behaviours will be unsupported (Schneider, 1990; Schneider and Rentsch, 1987). This research underscores the need for organizations to cultivate an environment where behaviours which support continued and consistent utilization of innovation are rewarded and supported. Specific organizational environmental factors may either stimulate or impede the sustained utilization of innovation once introduced. These factors will be discussed in the following sections and include leadership, training, support, incentives, values, age and tenure, organizational size and gender.

2.5.1.1 Leadership and Successful Innovation Outcomes

Schumpeter (2008) believes that the demand on leadership is higher for successful innovation outcomes than it is for innovation ideation. Within my practice, this distinction is very clear as it is common for various managers to come up with great ideas, but very few of them have the ability or resources required to implement this innovation with successful outcomes. This very real situation has informed my research focus on innovation outcomes rather than simply the stages of innovation.

My thesis research concentrates on innovations which involve my organization's sales force. Within my organization these types of innovations may be viewed as windows into the sales process with outcomes that can increase productivity and enhance transparency and accountability. With respect to innovations that involve sales teams successful innovation outcomes are by no means commonplace (Gohmann et al., 2005). Kalakota and Robinson (2001) posit that the front line users' perceptions of innovation will ultimately impact its eventual outcome of acceptance (favourable perception) or rejection (unfavourable perception). Given the investment made by organizations in innovation, its successful outcome is critical and Kalakota and Robinson (2001) make practical recommendations for organizations based on this imperative. For example, leaders of an organization who include sales associates during the selection process may create perceptions of ownership and aid in successful outcomes (Kalakota and Robinson, 2001). Excluding them from this may create the perception from sales associates that the chosen innovation is burdensome and onerous. It is also recommended that the sales force

innovation reflect the actual sales process and not an idealized sales process (Kalakota and Robinson, 2001) (i.e. what is real vs. what is desired). There is often the perception from front-line sales staff that the sales force innovation is employed by management to spy on them and to micromanage their daily tasks (Kalakota and Robinson, 2001). To counter this perception, leadership may consider clearly communicating that the relevant innovation is being implemented for the good of the sales associates and it not intended to monitor their daily activities. Other factors that may better align perceptions between leaders and front-line sales force toward innovation include training, incentives and collaborative development (Kalakota and Robinson, 2001). My thesis research will survey front-line, customer-facing sales associates as these individuals are responsible for implementing innovations on the front-line. Better understanding these associates will help to illustrate the challenges and opportunities that exist for organizations and perhaps lead to strategies for more successful outcomes of front-line innovation.

Researchers have also examined leadership styles which may be conducive or counter-productive to the sustained utilization of innovation once implemented. Narver and Slater (1990; 1995) define facilitative leadership as a style of managing people in a manner which encourages inquiry for the purposes of cross-functional learning. In terms of innovation, this suggests that it is the cross-functional learning and pollination of ideas that occurs that may have an association on the sustained innovation outcome. This inter-functional coordination (Narver and Slater, 1995) references the coordinated allocation of organizational resources for the purposes of enhancing the customer value proposition. Cascio et al. (2010) identify management commitment and alignment as a potential antecedent of innovation adoption. The concept of leadership commitment has been well documented (Barton, 1994; Cummings and Worley, 1993; Morgan and Inks, 2001). This commitment must come from the very top of an organization, not just front-line or middle management leadership. Leadership provides direction, sets the culture and is looked upon as the provider of sustainable prosperity for associates.

A strong innovation climate takes into account fitting and aligning the innovation to the organization value proposition. Ford et al. (2008) found that implementing successfully requires more participative group-based strategies to ensure aligned attitudes, competencies and skills to deliver the innovation.

2.5.1.2 Training and Learning Development

Fleischer et al. (1988) assert that availability of training for associates who are intended to implement innovation will not only accelerate its outcome but will also increase favourable perceptions of the innovation. Allowing appropriate time to allow users to adapt to innovation may lead to successful outcomes as even the simplest of innovations may require extensive learning curves (Zuboff, 1988). Leal-Rodriguez et al. (2014) indicate that outlining a calendar or schedule for associates so that they understand the timelines that are involved with the innovation may help to increase successful outcomes by impacting favourable perceptions of the innovation.

2.5.1.3 Support

Unwavering user support from all levels of the organization may be a key enabler of successful innovation outcomes (Rousseau, 1988). Users need to see others using the innovation with favourable experiences. User support can take the form of technical support, leadership endorsement and peer-to-peer utilization. Support and recognition from organizational leaders (Klein, 2005) is relevant to innovation outcomes in that associates who are responsible for implementing innovation are favourably impacted by leadership presence and support of the innovation.

2.5.1.4 Incentives

Monetary incentives and recognition (Lawler and Mohrman, 1991; Barua et al., 1997) are constant motivators within business. Oftentimes incentives are viewed as the main motivating factor for all aspects of achieving goals regardless of innovation-related or not. Disincentives for users who do not utilize the innovation (Klein, 2005) represent the classic metaphor of the carrot and the stick, with the stick being disincentives.

2.5.1.5 Values

Shared values are a foundational element of organizational culture (Klein and Sorra, 1996). Shared values must exist which are aligned with the innovation in order to lead to acceptance and appropriate utilization (Kelman, 1961; Klein and Sorra, 1996). Ruekert and Walker (1987) define organizational shared values as individuals and groups within a structure that interact using common meanings. The degree to which these values are commonly held creates a culture of higher commitment toward the desired behaviours. The innovation literature regarding values shows that the ideal environment for successful innovation outcomes may include a number of unique and shared values (Deshpande´ and Webster, 1989; Slater and Narver, 1995). Manohar (2014) provides cross-industry examples that core values are shared across organizations that are successful with innovation outcomes, regardless of industry. These enabling conditions allow an innovation to transcend individual and organizational resistance toward sustained utilization as appropriate (Glynn, 1996).

2.5.1.6 Age and Perceived Success of Innovation Outcomes

A common social perception is that the older an individual becomes, the less likely they will be to embrace innovation. The literature in this area is both extensive and divided. Schubert and Andersson (2015) conducted a study which found that employee age and innovation activities have an inverse relationship in that as average employee age increases, innovation adoption and successful outcomes decreases. Their study examined the relationship between age and innovation from a variety of perspectives, including access to training, reduced cognitive capabilities and vested interests. Their hypotheses examined whether older employees invest less in training due to their proximity to retirement from the workforce or whether older individuals actually have lower intelligence, reasoning and memory than do their younger colleagues. It examines whether older employees may actually subvert new innovation because they are vested heavily in older systems or processes. Schubert and Andersson (2015) found that employee age impacts innovation outcomes negatively and that the best way for organizations to mitigate this negative effect is to lower the retention of older workers over time. Ng and Feldman

(2009) suggest instead that the underlying factor in perceived success of innovation outcomes is more related to the individual personality and character composition of that individual than it is specifically to age. Ng and Feldman (2013) also found in a subsequent study that there is no relationship whatsoever between innovation-related behaviours and age.

Regardless of these different perspectives on the association between age and innovation outcomes, the aging workforce is real (Toossi and Torpey, 2017) and also part of the fabric of my organization. While there appears no consensus on the relationship between innovation and the age of the people who are xpected to adopt and use the innovation, within my company there is a need to understand whether there exists an association between innovation outcomes and age. The sales associate that participate in the survey cross many age cohorts making it possible to better understand whether associations do or do not exist. It will be possible to examine the state of innovation outcomes against a backdrop of varying demographics including the age of a sales associate.

2.5.1.7 Tenure and Perceived Success of Innovation Outcomes

Often obstacles to perceived success of innovation outcomes manifest in an organization's inability to let go of the status quo (Becker et al., 2009). Cultural factors may present which impede the very progress that the organization is attempting to make (Kumar, 2014). It is not until the post-mortem is performed after innovation is attempted that these obstacles are better understood.

Longevity at an organization is often touted as a positive attribute of both an individual and an organization (Ng and Feldman, 2013). An individual who has higher tenure is thought of as loyal, and an organization that has high tenured employees is viewed as a desired employer. With respect to innovation outcomes, tenure may be viewed negatively (Ng and Feldman, 2013). It is a persistent perception that the longer one's organizational tenure, the less positive one's relationship with innovation adoption and perceived success of innovation outcome. The literature related to tenure and innovation outcomes is somewhat thinner than the research

devoted to age and innovation outcomes. It is important to distinguish between tenure and age, treating them as separate constructs (Steffins et al. 2014). Ng and Feldman (2013) found that length of tenure at an organization has no relationship with perceived success of innovation outcomes. In practice, there may be a case of assuming a false relationship between tenure and innovation without any empirical support. An empirical position exists, however, that tenure and innovation outcomes may be positively related due to the fact that longer tenured workers may have gained a great deal of practical knowledge and know the best way to implement innovation (Steffins et al., 2014). This knowledge applies also to political savvy and understanding for how to move innovation through conception to execution and successful outcome.

2.5.1.8 Gender and Perceived Success of Innovation Outcomes

The literature does not provide a consensus regarding the role that gender plays in perceived success of innovation outcomes. Although it investigates individual characteristics, it does not consider gender in any great detail. In their study of innovation, Pretorius et al. (2005) did not discover differences between males and females with innovation. They had suggested that having access to different resources might result in gender differences but their research results did not bear this out. Heyden et al. (2018) found that there might be gender dependencies with innovation outcomes between a sales representative and an opposite sex supervisor in that a male supervisor was needed to support the female sales representative. In most of the literature, it was agreed that females were generally underrepresented in research sampling (Pretorius, 2005; Heyden et al., 2018).

My research studies my food company in which females are underrepresented in the workforce as I indicated in Chapter 1 but there is growing proportion of female workers in what has traditionally been a male-dominated industry. My research will examine perceptions of innovation outcomes and perceptions of what factors are felt to be important to successful outcomes from both male and female perspectives.

2.5.1.9 Organization Size Related to Success of Innovation Outcomes

Within the literature, the size of an organization may be categorized in many different ways including size of resources (Lee and Xia, 2006), size of workforce (Leal-Rodriguez et al., 2014) and size of competition (Laforet, 2013). Due to the size of available resources and personnel, larger organizations may have a greater propensity to innovate and to be able to successfully implement innovations (Leal-Rodriguez et al., 2014). In practical terms, however, this may not be accurate. A larger organization may have its largesse from sales volume, but may exist virtually and have a disproportionately small workforce. A large organization may have great difficulty working with bureaucratic channels to obtain funding that is required to implement new innovative systems and processes. Smaller firms may have greater propensity for innovation due to less bureaucracy, flexible rules and greater ability to adapt (Dejong and Marsili, 2006). Despite the positions taken in the literature, there does not seem to be clear consensus when it comes to establishing a relationship between organizational size and perceived success of innovation outcomes (Lee and Xia, 2006). Based on the innovation process framework discussed by Frambach and Schillewaert (2002), Hueske and Guenther (2015) assert that the size of an organization plays a significant role in influencing the outcome of innovation adoption and is positively related to perceived success of innovation outcomes. This is due to the fact that larger organizations need to consistently improve their performance to remain competitive. My organization is a larger firm, with 10,000 associates working across Canada and 890 front-line sales associates alone.

2.5.2 A Word about Pullig et al. (2002)

The Pullig et al. (2002) study that is referenced in my thesis has proven to provide a foundational element to my research. I read extensively about this research in my early days of my literature review and was intrigued by the similarities. My organization was in the midst of implementing a salesforce automation system (SFA) and this was one of the innovations that I chose to study in my research. Pullig et al. (2002) studied SFA with the goal of identifying specific factors that may improve perceived success of innovation outcomes. These researchers were measuring innovation outcomes both at an organizational level through business metrics of

salesforce productivity and from individual levels by studying individual perceptions. From this research, these scholars proposed a conceptual model of innovation effectiveness that suggested among other aspects that for innovation outcomes to be successful an organization must organize a number of factors that will help facilitate the entrenchment of the innovation. These factors inform both empirical research questions which are investigated in my research.

2.6 Successful Innovation Outcomes and Research Question Development

The literature review has informed the empirical research question development for the quantitative survey component of this thesis and has created a direct link between the body of academic work and the research that is reported in this thesis. Based on these scholarly findings, this research will focus on the core areas for this research investigating innovation outcomes within my organization, a wholesale food distributor. The literature review informed my approach to exploring innovation outcomes both individually perceived using a quantitative survey and organizationally measured using established performance metrics. I will now walk through each major theme from the literature, relate it to the empirical research questions that I am exploring in my thesis and also outline some considerations from the standpoint of my practice.

2.6.1 Demographic Factors, Empirical Research Questions and Practical Considerations

Demographic Factors were described by a number of the researchers whose work was reviewed. Pretorius (2018) described gender as making no difference in innovation outcomes. Tenure was discussed by Damanpour and Evan (1984) and Heyden (2018) evaluated gender and age as areas of interest with innovation.

From a practical standpoint, the aging workforce makes it important to better understand how age might be associated with innovation outcomes. The Canadian workforce is 60% female (Statistics Canada, 2010). The workforce of the studied organization is underrepresented: 22% female. Understanding if gender may be

associated with innovation outcomes will assist in providing support to increase successful innovation outcomes.

My organization has varying levels of organizational tenure. Further exploring the relationship between tenure and perceptions of innovation outcomes may help to better understand what types of support different tenure groups might require when implementing innovation.

My empirical research question #1 allows me to explore the relationship between these demographic factors and perceptions of innovation outcomes.

2.6.2 Enabling Factors, Empirical Research Questions and Practical Considerations

Enabling factors were highlighted by Pullig et al. (2002) and are explored through the survey administered to the sales force. Within my research, survey participants were asked to evaluate the importance of the following organizational factors which may be related to their perceptions of innovation outcomes: incentives, training, support, trust, customer focus, competitive differentiation, encouragement, best practice sharing, entrepreneurial values.

This relationship is explored through Empirical Research Question #2: What factors do sales people perceive may be associated with successful innovation outcomes?

2.6.3 Accumulated Utilization, Empirical Research Questions and Practical Considerations

Successful innovation iutcomes through demonstrated accumulated utilization which was discussed by Gupta (2010). From a practical standpoint, innovations that are perceived to have successful outcomes are also more likely to be engaged and updated by front-line users.

This relationship is explored through Empirical Research Question #3: How does perceived success of innovation outcomes relate to business measures of innovation success?

2.6.4 Actual Results, Empirical Research Questions and Practical Considerations

Successful innovation outcomes and business results were discussed by Ahearne et al. (2005) and Uhlaner et al. (2013). From a practical standpoint, I study how organizational KPIs may be related to perceived successful innovation outcomes or an individual's willingness to use an innovation or share an innovation with a customer. Tying sales results to perceptions of successful innovation outcomes used both the quantitative survey and organizational performance measures.

This relationship is explored through Empirical Research Question #4: What role do increased sales results play in an individual's perception of successful innovation outcomes?

2.6.5 Barriers, Empirical Research Questions and Practical Considerations

A number of barriers to innovation and its outcomes were explored in the literature review (D'este et al., 2012; Pourkiani et al., 2013; Pullig et al., 2002). From a practical standpoint, business transformation units assist with breaking down barriers which may exist within organizations. This may facilitate successful innovation outcomes. Business transformation teams support the learning process required to deliver successful innovation outcomes. They also confirm an organization's commitment to innovation success.

The potential role of business transformation teams is explored through Empirical Research Question #5: What association do business transformation teams have on both an individual's perception and an organization's measurement of successful innovation outcomes?

The literature review helped to further inform my overall research as I explored both individual perceptions of innovation outcomes and organizational results of innovation.

2.7 Chapter Summary

The findings from this literature review provided insights into the robust scholarly works relevant to innovation and its outcomes. Understandings that emerged included the critical imperative that exists for organizations to accelerate successful innovation outcomes, the higher than desired failure rates for innovation, and some of the factors and characteristics which may be related to successful innovation outcomes. The available research has helped to inform the overall research direction and also helped to shape the research questions that are both directly related to the literature and the stated research problem. The literature explored the very nature of innovation itself as well as stages of innovation. The scholarly review showed that many factors might be associated with the perceived and actual success of innovation outcomes, including organizational factors such as incentives and training and individual factors such as tenure and individual benefits realized through innovation.

Chapter 3 Research Methodology: Action Research

3.0 Introduction

This chapter outlines the action research approach and design chosen for my thesis which was thoughtfully constructed to answer my research question #1: What factors may be associated with successful innovation outcomes within my organization?, as well as the resulting subset of empirical research questions:

- Empirical Research Question #1: How do demographic factors of age, tenure and gender relate to an individual's perception of an innovation outcome?
- Empirical Research Question #2: What factors do sales people perceive may be associated with successful innovation outcomes?
- Empirical Research Question #3: How does perceived success of innovation outcomes relate to business measures of innovation success?
- Empirical Research Question #4: What role do increased sales results play in an individual's evaluation of successful innovation outcomes?
- Empirical Research Question #5: What association do business transformation teams have on both an individual's and an organization's evaluation of successful innovation outcomes?

As indicated earlier, the methodology for Research Question #2: What actions could my organization put into place to help improve the success of innovation outcomes will be discussed in Chapter 7.

This chapter introduces the innovations which I chose for study and explain why they were selected. It discusses the development of the survey that was delivered to the front-line sales team, how the research participants were identified and sampled, how the data was collected and how information was derived from the chosen data collection methods. It discusses the secondary measures, business definitions and data sources that were used in addition to the primary data generated from the survey. It then discusses the data analysis process conducted to address the empirical research questions. The ethical framework which governed the research including participant anonymity, data confidentiality and privacy is also discussed. All

of this is described as part of my action research journey which was initially described in Chapter 1 and is discussed in more detail later in this chapter.

3.1 Research Philosophy

Much of this chapter is dedicated to the research design and data collection aspects of answering my empirical research questions. Before we begin this discussion, however, I would like to establish the philosophical grounding for my action research. Guba and Lincoln (1994:105) refer to this "outside in" approach as peeling the research "onion" by first looking at the ontology and epistemology before looking at the methodology.

My focus is to ensure that my research will be relevant to my research questions and rigorous in its methodological approach. As described in Chapter 1, there exists beliefs about the phenomenon of innovation outcomes within my organization. These beliefs need to be transformed into epistemologies. This will be done through the scientific inquiry that will be described in this section. I also believe that a positivist philosophy is required to aid my inquiry, to understand through direct observation how our sales force interacts with the innovations being studied. I will make recommendations for implementing innovation in the future after analysing and reflecting upon my research. Therefore, I adopted a positivist, quantitative approach in the development of my survey research instrument and the analysis of the data. My research approach and my action research methods are further discussed in the following sections.

3.2 Action Research Approach

Action research is appropriate for this study due to my insider status within my organization as well as my desire and ability to make change within my organization (Coghlan and Brannick, 2010). As an action researcher, I have a great scholarly curiosity regarding innovation outcomes, a vested professional interest in understanding how innovation may produce successful outcomes and the proximity

and ability to explore the process of making change within my organization. I therefore undertook action research within my own organization which involved much collaboration, communication and reflection.

As an action researcher, I set goals to answer research questions through my research. These research questions were constructed according to the purpose that I outlined in Chapter 1. I further discussed these research questions in greater detail in the preceding section.

The construction of my research design allowed for a well-rounded understanding of innovation outcomes within my organization and was grounded by the academic literature which provided guiding principles for the journey. My research design was to first understand the high level factors that may be associated with successful innovation outcomes within my organization and then understand the success of innovation in relationship to a number of factors at a more micro level and finally to put my learnings to work within my organization to understand whether my action research could make a positive impact.

My action research approach followed the arc of my research end-to-end. Table 1 summarizes my approach and I describe each step in the subsequent sections.

Action Research and Reflective Practice I conducted my action research within my own organization while engaging in reflective practice. The elements of this approach are displayed below.	
Pre-Planning	• Developing research questions • Establishing communities of practice and journaling • Gaining endorsement within my organization for my research
Action: Literature Review	• Delving into academic literature to discover i) knowledge created by other researchers regarding both actual and perceived innovation outcomes ii) ensure that my approach is grounded in academia iii) learn more about what factors may be associated with successful innovation outcomes
Observation and Reflection	• Identifying areas within literature to inform my own research • Understanding how this knowledge would inform my research purpose and questions
Action: Survey	• Identify survey methodology: audience survey • Socialization within organization and gaining leadership endorsement
Observation and Reflection	• Analysing and understanding results from survey
Refinement	• Synthesizing results for leadership and collaboratively refining approach • Creating checklist that could be deployed • Making practical recommendations
Action: Deployment of checklist	• Using checklist on deployment of innovation
Observation and Final Reflection	• Taking results back to organization and creating recommendations for my organization • Reaching conclusions for my own future practice

Table 1 Arc of Action Research

3.2.1 Reflective Practice

My action research process began with a great deal of reflection within my practice, where, as I described in Chapter 1, I encountered inconsistent success with innovation outcomes based on individual perceptions and/or actual business

outcomes using performance metrics. As a practitioner, there is considerable value for me to better understand what factors are present when innovation results in successful outcomes as this would allow me to learn to identify aspects of the environmental context that have affected innovation success. This could then inform further actions in the future with other innovation efforts to support successful outcomes for my team and my organization. I will describe some of the reflective practice techniques below including my action research journal and the communities of practice which guided my research.

3.2.1.1 Action Research Journal

My action research journal has been an important document for me throughout this research process. I would use this journal to jot down notes about my research, about observations or important thoughts. I would also use this journal as a research mirror as it reflected back to me the things that I could learn about my organization, my research focus and my world. I think that it has, at times, helped me to understand more deeply my research purpose and has helped ground me during this long and winding research journey. When I read back through my journal, it is obvious that I have a deep interest in what I am studying as it has kept my interest for a significant period of time. In many respects, the journal has helped to be a support and an extra resource for me on my exploration of innovation outcomes. An extract of my journal may be found in Appendix F.

3.2.1.2 Communities of Practice

As part of my regular practice, I participate in informal learning sets or communities of practice and have done so for over twenty years with a fairly stable core group. It is a self-facilitated group where marketing professionals come together, both from within my organization and external to my organization. We meet monthly for about four hours as part of our personal and professional development and the group size ranges from 5 to 12 people attending each meeting. Our agenda is self-directed and individuals agree to a privacy commitment (what is discussed in the community stays in the community) and members are free to bring work related issues or problems to the group where they could benefit from collaborative exploration.

During the first stage of my action research process when I was still defining my research questions, I would broach agenda topics which focused on innovation outcomes and why it would fail. My community mentors would help me clarify my thinking by questioning why I thought in certain ways or how I thought the problem could be solved. These structured conversations helped me to not only better understand my own viewpoints on innovation outcomes but also to help me formulate an action plan toward exploring these viewpoints. These discussions provided me with further fodder for contemplation and reflection. The outcome of this process is most evident in the statement of my research questions. I have captured the main understandings of my communities of practice conversations within my learning journal, which is summarized in Appendix D.

3.2.2 Literature Review

Through my action research journey, I had a great deal of reflection and through these thought processes and curiosities, my conversations within my community of practice and the information that I absorbed through the literature review all helped me to create empirical research questions to explore during my research phase. As my practical conversations continued, this experience led me to the academic literature to learn more and to augment the workplace discussions. I conducted a literature review in the area of innovation outcomes and examined research from a variety of angles to determine what factors may be associated with innovation outcomes. The literature review helped me to define what innovation is and what successful innovation outcomes are, whether perceived or as measured by organizational performance metrics. There were many different aspects of innovation and innovation outcomes, and I tried to focus my review on the areas that were relevant to my research questions, focusing on individual perceptions and organizational measurement.

3.2.3 Survey: Identifying Methods and Participant Sample

After my literature review, I began to entrench my methods within my practice. I discussed my approach and suggested methods with my organization's leadership

team. I gained endorsement and the necessary approvals to survey our front-line sales force in order to generate quantitative data that would help me explore individual perceptions toward innovation outcomes. I then developed a survey to help me explore my research questions within the framework of the scholarly knowledge that is reviewed and discussed in Chapter 2. The details of the survey methodology and design are discussed in Chapter 4.

3.2.4 Refinement: Results and Practical Approach

During this phase of my research, I compiled the results of my survey and mapped these results to the secondary data generated through my organization to gain an understanding of individual perceptions (through survey) and organizational results (through business metrics). After analysing the results, I put together summaries of key understandings from my research for my leadership team and we reviewed the overall results and discussed ideas that we could implement immediately to see if they helped us with innovation outcomes. We put together a checklist that we felt might help our organization achieve more successful outcomes from innovation. This is presented in Appendix I.

3.2.5 Deployment of Checklist: Putting Research into Action

I then took this checklist to a department within my organization that was about to implement an innovation. We agreed to utilize the checklist with this new innovation and observe the results. I discuss this portion of my action research in more detail within Chapter 7.

3.2.6 Observations and Final Reflections for Future Action Research and My Own Practice

I was able to implement the checklist within an innovation and understand any association with successful innovation outcomes. As part of my reflective practice I discussed not only other aspects of expanded research in the area of innovation outcomes but also discussed shifts that had occurred within myself as a practitioner scholar and also within my organization itself.

3.3 Chapter Summary

This chapter presented the methodological approach for my action research study. It outlined my overarching action learning approach and provided an overview of the stages of my research including the survey, the participant group and how I used tools to explore individual perceptions of innovation outcomes as well as orgnaizational outcomes using established business metrics. The described approach also explains how I then took action within my own organization. Critical reflection served as a guiding light for my methodology allowing me to continually clarify my approach within the framework of my research design and approach. In the next chapter I will discuss the research methodology for my quantitative survey in greater detail.

Chapter 4 Research Methodology: Measuring Individual Perceptions and Using Business Performance Metrics

4.0 Introduction

My research focused on dual sources of information to better understand both individual perceptions of innovation outcomes using a quantitative survey and business outcomes of innovation outcomes using actual performance metrics.

The quantitative survey was used to answer my first research question:

RQ1: What factors may be associated with perceived successful innovation outcomes within my organization?

With this survey, I wanted to better understand the individual perceptions of my organization's front-line sales associates toward innovation outcomes.

The goal of this survey was to obtain answers to my empirical research questions through data returned from a survey of my direct, front-line sales force. This rich source of data could then be explored alongside actual business outcomes using established performance metrics which will be discussed below.

I then used actual business performance metrics to evaluate my organization's measurement of an innovation outcomes. These performance metrics are described below in further detail.

Together, these two sources of measurement (individual perceptions and organizational measurement) helped create further understanding of innovation outcomes.

4.1 Measures, Business Definitions and Data Sources

While the quantitative survey itself will be the central foundation of this methodology section, additional data points will be utilized in the results and discussion chapters when comparing and correlating practical data which exists within my organization with original data which emanated from my survey and this research effort.

A number of measures and data sources were utilized during my research and are referenced within this thesis. Within Table 2, I define these measures and data

sources to help the reader become familiar with the business terms of my organization, how they are defined and how they are utilized. Sample reports for these measures are placed in Appendix B to illustrate the type of data that was utilized.

Table 2 Measures – Business Definitions and Data Sources

Term or Metric	Consideration	Data Source
Term: Salesforce CRM	Customer relationship management tool, a cloud-based system that is used by the sales associates to manage their day-to-day business. This system is programmed within the "Salesforce" technical platform and language.	In addition to being a tool used by the sales associates, this tool was also the source of aspects of the data used in this research.
Metric: Increased Sales	This is a measured used by my organization which describes year over year performance as measured by cases sold to customers.	This data is pulled from the organization's server and a sample of this report is included in Appendix B.
Metric: Sales Adoption Rate	This is a measure which uses the total number of sales associates as the denominator and uses the total number of active sales associate users of an innovation as the numerator. So divided and expressed as a percentage this is our Sales Adoption Rate. This is a typical measure that our organization would use to measure any form of sales associate adoption rate.	This metric is pulled from the organization's SalesForce Customer Relationship Management (CRM) system.
Metric: Customer Adoption Rate	This is a measure which uses the total number of customers as the denominator and uses the total number of active customer users of an innovation as the numerator. So divided and expressed as a percentage this is our Customer Adoption Rate. This is a typical measure that our organization would use to measure any form of customer adoption rate.	This metric is pulled from the organization's SalesForce Customer Relationship Management (CRM) system.
Metric: Customer Retention Rate	This is a measure which shows what percentage of active customer users are using the innovation for five consecutive weeks in the last three	This metric is pulled from the organization's SalesForce Customer

Term or Metric	Consideration	Data Source
	months. This is a typical measure that our organization would use to measure any form of customer retention.	Relationship Management (CRM) system.
Metric: Investment	This is the total fiscal year actual expense that shows twelve fiscal periods of actual expenses recorded for the initiative. This is the typical measure that our organization would use to measure any investment in any initiative within the enterprise.	This metric is found in full year performance report published by our Commercial Finance team.
Term: Transformation Team Assigned	Indicates which initiatives had a transformation team assigned and which did not.	I used my own knowledge of each initiative to log this data.
Metric: ROI Objective	This was the measure expressed as a return on investment. This is reported as a minimum sales growth objective established by the business owner.	I manually extracted this measure from the capital investment plan prepared for each initiative.
Metric: ROI Objective Met	This is a simple "Yes" or "No" as to whether the stated ROI Objective was achieved, or not.	I took this metric from our company financials as well as my own knowledge of each initiative to log this data.
Metric: Impact	This was a measure that was used on the quantitative survey whereby the sales representative allocated 100 points to one or more of nine factors. This was measured by the average number of points assigned to each factor.	The average score that could be assigned to any of the nine factors is 11. Any score that was 10 or below was rated "below average" and any item that was rated 12 and below was rated "above average".

4.1.1 Definition and Measurement of Successful Innovation Outcomes

The focus of this research is examining factors which may be associated with innovation outcomes. This focus necessitates the definition of what "success" is, from both an organizational point of view and the users' point of view. I will discuss the measurement of successful innovation and then introduce the innovation in the subsequent section.

This thesis will explore two perspectives on successful innovation: individual and organizational. The organization being studied has its own metric for measuring

success of the innovation being implemented and this is a quantitative measurement using sales growth, return on investment, customer retention and other business measures. These were defined in the preceding section. The participants in this research may have alternative, individual perspectives on successful innovation. For them, they were asked questions to evaluate the innovation's success, to see if they would use the innovation themselves or if they would encourage their customers to use it. These two perspectives are further explored in Table 3.

Table 3 Definition and Measurement of Successful Innovation Outcomes: Both Individual Perceptions and Actual Business Results

Perspective	How Success is Measured	What Business Measures will be Used	What Survey Measures will be Used
Individual Perceptions	Perceived Success Measures	n/a	The following four questions were asked regarding each innovation. These questions were influenced by the 2002 Pullig et al. study. The answers to these questions were explored to understand the relative perceived success of innovation outcomes: How would you rate "innovation" overall in terms of successful outcomes as it relates to positive impact to your customers? What degree of positive impact has "innovation" had on your business performance? How likely are you to encourage your customers to continue to use "innovation"? How likely are you to continue to use "innovation" yourself?
Organizational Results	Established business measures (defined in the preceding section) will be utilized to evaluate	ROI Objective met Increased Sales Results	These measures were provided by my organization.

Perspective	How Success is Measured	What Business Measures will be Used	What Survey Measures will be Used
	successful innovation outcomes through positive business outcomes.		

4.1.2 Introducing the Innovations: Identification and Description of Innovations Studied in this Thesis

The six innovations which are being studied in this thesis are defined and characterized in Table 4. The names of the innovations are labelled along with the nature of the innovation described in terms of the theoretical characteristics provided by Schumpeter (2008) and Pullig et al. (2002).

Table 4 Description of Innovations

Innovation	Description	Theoretical Context
NCOB*	A process and product involving the onboarding of new customers within the Canadian marketplace. It represents a significant change in process for the sales associate, a tracking mechanism using the organization's CRM tool, new collateral to share with potential customers and some follow up protocols. Innovation #1 was launched six months prior to this survey and has shown a 30% adoption rate within the organization's salesforce. It is not perceived as an innovation which has been readily adopted by the salesforce.	Schumpeter (2008) classifies this innovation as new methods of production. NCOB fits within Pullig et al.'s (2002) description of innovation as a process that is novel to an organization.
Loyalty	A customer-facing loyalty program. The program has been in place for 3 years and is an ongoing source of focus for the organization. There is an 80% adoption rate within this participant base with a constant push to grow adoption rates to 90%.	Schumpeter (2008) classifies this innovation as new products. Loyalty fits within Pullig et al. (2002) description of innovation as a product which is novel to an organization.

Innovation	Description	Theoretical Context
CRM*	A customer relationship management tool that has been introduced to the sales force within the last 12 months. There was a rocky path to adoption, involving training, change management, leadership endorsement, feedback sessions, incentives, threats and so forth to ensure that sales associates were engaging with Innovation #3. The utilization/adoption rate has increased over the last 6 months but is still not at 100% adoption.	Schumpeter (2008) classifies this innovation as new supply chain. CRM fits within Pullig et al. (2002) description of innovation as a process which is novel to an organization.
ISR*	This acronym stands for "Inside Sales Representative" and is a recently and rolling launched innovation which impacts sales associates directly. It involves an Inside Sales organization contacting customers in addition to the sales associate points of contact.	Schumpeter (2008) defines this innovation as a new organization. ISR fits within Pullig et al. (2002) description of innovation as a process which is novel to an organization.
Customer First*	A new innovation launched within the previous 12 months which involves polling customers directly to assess satisfaction and loyalty. Sales associates are asked to support this innovation, to follow up with customers who describe issues that require resolution.	Schumpeter (2008) defines this innovation as a new marketplace. Customer First fits within Pullig et al. (2002) description of innovation as a concept which is novel to an organization.
Compensation	A critical compensation-related innovation that was launched in the last 12 months. It involves a new calculation for sales commissions and impacts overall benefits and compensation for our front-line sales people. It was very negatively received and misunderstood upon launch.	Schumpeter (2008) defines this innovation as a new process. Compensation fits within Pullig et al. (2002) description of innovation as a process which is novel to an organization.

*Transformation team assigned

These innovations were chosen to be studied within this thesis for several reasons: they had been recently rolled out very broadly within my organization so while they were convenient and timely for study, they also crossed multiple departments and forms of innovation which provide a rich environment for study.

4.1.3 Organizational Outcomes: Business Performance Metrics

A number of business measures were identified as providing practical benchmarking for the studied innovations. Table 5 describes the business measures that were used within my organization to gauge successfulness of innovation outcomes.

Table 5 Business Measures of Innovation Success

Innovation	Sales Adoption Rate	Customer Adoption Rate	Customer Retention Rate	Sales Growth	Investment	Successful according to ROI Objective
NCOB*	60%	75%	86%	8%	$1.5M	No
Loyalty	41%	50%	91%	3%	200K	No
CRM*	90%	93%	82%	1.5%	90M	Yes
ISR*	68%	82%	90%	6.3%	12M	Yes
Customer First*	80%	96%	92%	5.2%	3M	Yes
Compensation	95%	90%	88%	1.3%	900K	No

For each of these innovations, different stakeholders had varying degrees of ownership and interest. As I worked through my organization to gain endorsement for my research, I also found that having innovations with various functional appeal allowed me to gain good cross-functional support of my research. This very practical nuance of action research allowed me to be inclusive of different organizational functions.

4.1.4 Business Transformation Teams

As indicated, Business Transformation Teams were utilized for four of the innovations (NCOB, CRM, ISR, Customer First). These business transformation teams were assembled with an associate from each of the following functions: finance,

information technology, sales, merchandising, marketing, HR, learning and trainng. These members were seconded from their regular function to work exclusively on the innovation. They met weekly beneath an executive sponsor who led the innovation project. Their role was to interface with the sales teams who were deploying the innovation and ensure that their functional counterparts who were managing the innovation were providing the sales representatives with the support and information that they might require.

4.1.4.1 Perceptions of Successful Innovation Outcomes

My research looks at successful innovation outcomes from two perspectives: organizational actual business results and individual perceptions. As discussed in Table 2, the organizational measurement uses ROI metrics and the individual perceptions evaluated through the four survey questions described in Table 3.

4.1.4.2 Factors and Values that Sales Team Perceives Important for Successful Innovation Outcomes

My organization's 890 sales associates were asked to participate in a survey that focused on innovation outcomes of six innovations which had been recently implemented within my organization. As well, they were asked to weight, in order of importance, four climate factors and six values that may affect the successful outcomes of these various innovations (i.e. training, support, rewards, leadership and encouragement). These factors and values were informed by Pullig et al. (2002) and discussed in Chapter 2. My action research into innovation outcomes considered these organizational factors which may impact sustainable sales force innovation as well as efficacy of same. Participants were provided with definitions of these factors to ensure transparency. The individual and organizational factors along with the definitions are listed below in Table 6.

Table 6 Success Factors for Enabling Innovation Outcomes

Grouping	Success Factors for Innovation Outcomes
Organizational	**Incentives:** If incentives are offered in exchange for the adoption of the innovation (could be incentives for Sales, or for Customer, etc.).
Organizational	**Training for you:** Sufficient and appropriate training is provided for all users.
Organizational	**Support for you:** Sufficient and timely solutions provided when problems and/or questions are encountered.
Organizational	**Encouragement/Leadership:** Usage of the innovation is encouraged throughout the organization (i.e., by your Company leadership, and elsewhere within your Company).
Individual	**Customer Focus:** Understanding how these innovations will assist you in assisting your customers.
Individual	**Competitive Differentiation:** Understanding how these innovations will differentiate us from our competitors.
Organizational	**Ability to share Best Practices:** Having a culture and structure which fosters cross-functional sharing of information (i.e., between departments, between locations, etc.).
Individual	**Trust:** Having the ability to rely upon other members of your organization.
Organization	**Entrepreneurial Values:** Having an environment where risk taking and pro-activeness is encouraged.

The participants then ranked these factors based on their importance in impacting the ability to successfully implement innovation using a ranking scale. They were asked to distribute a total of 100 points between the nine aspects listed based on their association with supporting perceived successful innovation outcomes. The web survey supplied a running total as they worked through the questions to ensure that the choices summed to 100. Definitions of each factor were provided within the table that was presented to ensure understanding.

4.1.4.3 Demographic Data

The survey collected demographic data from each respondent to inform Empirical Research Question #1 which asks whether demographic factors may have an association with successful innovation outcomes. The demographic variables studied are presented in Table 7 below.

Table 7 Demographic Variables Studied

Demographic Variable	Question Asked
Tenure	How long have you worked for this company?
Gender	Please select your gender
Age	Please select your age range

4.2 Survey of Sales Associates

I decided to focus my research of innovation outcomes on our customer-facing sales associates because they are most often charged with implementing innovation to customers and they present interesting demographic nuances within a homogenous job function. I outline this participant group in more detail in the next section. In my research design, which will be discussed in subsequent sections within this chapter, I will describe the survey that was deployed to this group.

4.2.1 Type of Survey

I identified that a quantitative survey would be the best approach to enable me to reach this large participant group within my organization. Our sales force is large and spread out across the expanse of Canada and electronic surveying allowed me to approach every front-line sales associate within my organization. Asking questions from different perspectives of innovation outcomes would help me to understand what factors support perceived successful innovation outcomes.

I used a web-based survey tool through Walker Intelligence software which is a proprietary tool available to me through my workplace. My organization has a significant partnership with this organization for customer loyalty work and this partnership allowed me to have access to this survey development tool. This allowed me to custom create and deploy survey instrumentation through a system that was already well known to our sales force rather than an off-the-shelf public access tool. Because I had full access to this tool, I was able to not only develop the survey, the questions and content, but I programmed and deployed the survey myself through this tool. I had exclusive and private access to the results through my own portal and this also enabled me to share the results later with my leadership team in a credible fashion that was familiar to them.

The development of the survey was informed by my literature review and my action research approach including my own critical reflection process with the goal of providing answers to my empirical research questions. I drafted the content and gained ethics approval from the University of Liverpool, shared it with my organization's leadership team for feedback and discussion and with my academic supervisor and refined accordingly. I then hard-programmed the questions into the Walker survey tool and prepared for deployment. The survey may be found in Appendix C.

The quantitative survey was administered in November 2015 and comprised 35 closed questions. The survey explored six different innovations that had recently been implemented within my Canadian wholesale food organization and were discussed in the preceding two sections.

4.2.2 Description of the Survey

The survey itself comprised four electronic pages. The survey questions were constructed based on my research questions. The innovations were displayed to respondents using their operational names and the first question pertaining to each innovation was a screening question to ensure that the respondent was familiar with the innovation. In practical terms, each of the innovations should have been very familiar and relevant to the research participant in their front-line sales role. Despite this familiarity, not all of the innovations were perceived as delivering successful outcomes by the sales associate and not all of the innovations were deemed successful by the organization using business metrics. Regardless, the use of the screening question ensured working knowledge of each innovation described.

A 5-point Likert scale was chosen for this portion of the survey instrument which is supported by the literature. Hartley (2014) notes that 5-point Likert scales are particularly suitable for quantitative inquiries where there are larger sample sizes such as that found in this investigative effort. Scales using 5 to 7 points are common and Hartley (2014) suggests that there is no material difference when choosing between the two odd scale points. My quantitative survey utilized a 5-point Likert

scale which required participants to use their individual perceptions to evaluate factors and how they felt these factors relate to perceived successful innovation outcomes. On this scale 5 was the highest and 1 was the lowest, meaning that 1 was perceived to be the least related to successful innovation outcomes and 5 was perceived to be the most related to successful innovation outcomes.

4.2.3 Identifying Participants

As the next step in my research, I determined my research participants. As my organization aggressively pursues innovation in all its forms, there was great appetite for discovering how we could become more effective at delivering successful innovation outcomes and driving accumulated utilization within our sales facing innovations. As well, in my community of practice discussions, there were many emergent understandings about the importance of driving innovation out to customers to help enrich their experience. Also, many of the innovations that are implemented at my workplace involved our front-line sales staff. It is this front-line sales staff that meets with customers each day, takes orders and is responsible for our profits. As an action researcher, I had been told by various sales associates that they are overwhelmed, that there is too much "new" happening and that our organization needs to prioritize, plan and become more strategic about how we are rolling out innovation.

4.2.4 Sampling

My organization employs 890 front-line sales associates who work in locations across Canada. Because I had access to the entire sales force, I had a powerful survey technology tool and I had the support of my company's leadership team, I decided to use a 100% sampling strategy and deploy my survey to the entirety of my organization's 890 sales people. My sampling strategy is described in Table 8.

Table 8 Sampling

Sampling Stage	Quantitative Sampling Strategy
Population	890 direct, front-line sales associates within my organization. This is a defined role within my organization and each member of this

Sampling Stage	Quantitative Sampling Strategy
	organization is known and identified through our enterprise-wide CRM tool.
Sample Frame	890 field associates
Sampling Unit	Sales associates
Data Collection	Quantitative survey delivered electronically
Sample Plan	Gain endorsement from my organization's executive team by showing research plan and supporting documentation. Send letter explaining goals of my thesis and goal of research to research participants and their immediate supervisors; share confidentiality and ethics form, participant waiver Deliver survey with timely reminders.
Sample Recruitment	All field associates were emailed directly and invited to participate in the survey through 100% sampling
Sample Size	890 field associates are in the population. I contacted the entire sampling frame. I received responses from 709 responses (80%) of which 659 were eligible to participate.

This sampling strategy allowed for the canvassing of the entire sales force within my organization. The goal of this significant scale was to provide rich data which spanned geographies, ages, genders and varying organizational and individual factors. Due to my insider, action researcher status, I had fairly unlimited access to my target participant group and also was able to develop a high level of awareness across the entire sales team. The data that was to be generated was highly anticipated by my organization's leadership team due to the paucity of information that has been previously available. The organization viewed this research as a seminal opportunity to understand how our associates were using and perceiving innovation. This high level of interest in the data also meant that I had powerful and vocal support for my survey effort.

The entire population of front-line customer-facing associates within my organization was accessible to me so I contacted 100% of this group to reach the largest possible participant group. Data collection was conducted via electronic survey which provided economies of scale as the more surveys administered and collected within one platform, the better overall cost per respondent. One hundred percent sampling, while rarer than random sampling methodologies allows for richer insights due to the wide coverage of the population (Creswell, 2009). I did not use an

anonymous off-the-shelf survey website, but I built a custom survey tool which allowed me to personalize the survey for each participant while maintaining anonymity. Each participant received an email that had their name on it, their company name on it, and also received personalized reminders if they had not already completed the survey. The surveys were anonymized before the data extraction, which is described in the Ethics and Confidentiality section of my thesis.

Sales leaders were asked to validate the email addresses prior to the survey being launched to ensure that all were correct and to minimize bounce backs and/or unhygienic data. Participants were contacted via email and the email addresses were harvested from my company's CRM tool.

4.2.5 Response Rate

Eight hundred and ninety surveys were initially sent to sales associates. A screening question was used to ensure that the respondent was a front-line, customer-facing sales associate. This turned out to be a sound approach as fifty respondents of those surveyed were deemed ineligible based on this screener. Table 9 displays the distribution of eligible and ineligible responses.

Table 9 Response Rate Distribution

		Frequency	Percent of sent
Sent		890	100%
Received	Ineligible	50	5.6%
	Eligible	659	74%
	Total	709	80%

In total, I received responses from 709 (80%) of the sales associates invited to complete the survey. After omitting 50 surveys from ineligible respondents based on the screening question, 659 of the returned surveys were valid. These participants represent 78% of the 840 eligible surveys received.

4.2.6 Data Collection Procedures

Once internal stakeholders were notified of the survey and had a chance to collaborate and endorse the instrument, the survey followed a set process to notify and solicit support for the survey:

1. Week 1 Day 1: Notice from the President that the associate would be receiving a survey (this notification came via email to all participants as well as posted on the organization's CRM tool
2. Week 1 Day 4 Email link to all participants with the survey
3. Week 2 Day 4 Email reminder to all participants who had not yet completed the survey
4. Week 3 Day 4 Survey concluded

During my preparatory meetings with my organization's leadership team we agreed that the data collection period would last no more than six weeks. Through prior surveys to the sales associates it was found that six weeks would allow us to maximize our returns without fatiguing the participants. There were also realistic budget constraints as each week that the collector remained open, I would be charged a fee from the software company that manages the survey platform. Each communication phase reinforced that completing the survey was optional and that it would be confidential and provide benefit to the organization and ultimately to the participants by way of improved innovation outcomes. The participant authorized an electronic consent form before participating in the survey and had an Exit option as well as opportunities to contact myself or the President if they had questions, concerns or comments. The consent form may be found in Appendix E along with other Ethics and Confidentiality materials.

It took longer than I had anticipated to achieve the appropriate approvals and sign-offs on the survey within the organization prior to deployment. There were many discussions and varying opinions on the correct course of action. This took considerable time and discussions to reassure stakeholders, to gather feedback and to collaborate effectively as an action researcher. Once approved, the actual data collection took far less time than anticipated (it had been estimated that it would

take six weeks to collect the quantitative data, when in fact it only took two weeks for data collection and 2.5 weeks in totality from initial notice to the close of the survey). There were no incentives/rewards offered for completion of the survey.

4.2.7 Ethics and Confidentiality

During the sales force survey and data collection, I was interacting with colleagues, co-workers and direct reports. As an action researcher, I had a higher familiarity with these stakeholders than an outside researcher may have had. As such, I needed to be vigilant to ensure that all participants were comfortable and secure. Respondent anonymity was guaranteed and data is presented in this thesis by a participant number rather than by name in order to track response rates by geography. Research was conducted in accordance with the University of Liverpool governance and guidelines as well as with my own organization's ethics policy. I gained the consent of participants through a multi-stage process which is detailed in Appendix E. An Ethics Information Sheet was shared with the participants which allowed the participant to ensure that they had read and comprehended the information screen, had an opportunity to ask questions. This was also an opportunity to reinforce that their participation was voluntary. Participants were also informed of the benefits of participating in this research and were also assured visibility into the top-line results of the research. The theme of innovation outcomes is one that is commonly discussed within organizations which may have created a higher than usual comfort level with the topic.

4.3. Data Analysis

The quantitative survey results were returned via the web-based survey tool and were then downloaded to a raw comma-delimited (CSV) file. I then prepared a codebook, which may be found in Appendix A, which manually translated text data into numerical data. This codebook was then imported into SPSS software to run analysis. Email addresses and other identifying information was stripped away from this codebook to ensure anonymity and adherence to the ethical framework established for this research.

I entered the raw data into SPSS. Following data entry, the first step in the analysis of the survey results involved running basic descriptive statistics. This phase allowed for the exploration of data, the assessment of associations between various constructs and signalled the beginning of the sense making process of the data prior to performing more detailed statistical analysis. I then analysed the results to identify factors which may be related to perceived successful innovation outcomes. Data on categorical variables like gender, tenure and age are presented in Chapter 5 using frequency distribution and bar charts.

4.3.1 Exploring Empirical Research Questions

The data collected through this research were analysed to gain a better understanding of the factors which may facilitate or deter perceived successful innovation outcomes within organizations. This exploration is related directly to the research questions presented in Chapter 1. Empirical research questions are listed below and will be explored through the quantitative survey.

4.3.1.1 Empirical Research Question #1: How do demographic factors of age, tenure and gender relate to an individual's perception of an innovation outcome?

Exploring the association between sales representative demographic variables (age, gender and tenure) on perceived innovation outcome success was done using the independent samples t test and ANOVA. More precisely, for exploring differences in perceived success by gender, independent samples t test is used. Effect of age and tenure was explored using single factor ANOVA as age and tenure have more than two categories. Effects that were significant at alpha = 0.05 were interpreted as support for an association between the demographic variable and perceived successful innovation outcomes.

4.3.1.2 Empirical Research Question #2: What factors do sales people believe may be associated with successful innovation outcomes?

Effect of factors perceived to affect success of innovation outcomes were assessed using repeated measures ANOVA. Nine factors were offered to respondents where each respondent shared a total of 100 points among nine factors with higher assigned points indicating greater perceived impact of that factor on success of the

innovation. Since this design generated repeated measurements, repeated measure ANOVA was used. Wilk's lambda measure and the associated F test was used to explore the overall difference among nine factors and then pair wise comparisons were used to understand significance of difference in pairs of factors.

4.3.1.3 Empirical Research Question #3: How does perceived success of innovation outcomes relate to business measures of innovation success?

Perceived success of innovation utilization was explored through characteristics including success, degree of positive impact, encourage customers to use and self-use of innovation. Actual successful innovation outcomes were explored using the business metrics set by my organization. Odds ratio was used to compare the perceived and actual outcomes of the innovation over a three year period.

4.3.1.4 Empirical Research Question #4: What role do increased sales results play in an individual's evaluation of successful innovation outcomes?

Descriptive statistics were utilized to understand percentage increase in sales in Year 1 across successful and unsuccessful innovation outcomes.

4.3.1.5 Empirical Research Question #5: What association do cross-functional or business transformation teams have on both an individual's and an organization's evaluation of successful innovation outcomes?

The effect of assigning transformation teams on innovation outcome success (based on having met the set ROI objective) was examined using comparison of proportion of successful innovations with assignment of transformation teams. Since my study involved six innovation efforts, the proportion of innovations with successful outcomes of those where transformation teams were assigned was computed using odds ratios.

Chapter 5 Results

5.0 Introduction

The purpose of my thesis was to investigate the factors which may be associated with successful innovation outcomes. Innovation outcomes could be evaluated against business measures or sales associates' perceptions. In either case, gaining a better understanding of how to improve successful innovation outcomes would be beneficial to my organization as it depends on successful outcomes to remain competitive and profitable. This chapter will explore the results generated from exploration of Research Question #1: What factors may be associated with successful innovation outcomes within my organization?

Both my research purpose and the academic literature guided my work and empirical research questions were explored through quantitative inquiry comprising web-based surveys of front-line, customer-facing sales associates. Data gathered from the resulting 659 surveys completed by respondents was used to identify factors which may be associated with successful innovation outcomes. The findings presented in this chapter will merge these quantitative results with my organization's practical results and will summarize the collected data, the statistical treatment, and the mechanics of analysis for the described research. Detailed data analysis may be found in Appendix H and discussion of these results may be found in Chapter 6.

5.1 Frequency Tables for Demographic Variables

As described earlier, I ran categorical analysis for the demographic data that was generated from my survey. The goal of this was to understand the demographic circumstances of sales associates and then explore these circumstances with respect to perceptions toward innovation outcomes and the actual business measures themselves. The frequency tables will be presented in the following three sections and will help to provide an overview of my survey participants.

5.1.1 Description of Survey Participants

Table 10 below displays the frequency distribution of age of sampled sales associates. The majority (more than 50%) belonged to age group of 26 to 45 years. 23.1% belonged to 46 to 55 years. Only 4.7% were aged 56 or more years and only 2.9% were 20 to 25 years old.

Table 10 Frequency Distribution of Age

	Frequency	Percent
20 - 25 years	19	2.9
26 - 35 years	185	28.1
36 - 45 years	229	34.7
46 - 55 years	152	23.1
56 or more years	31	4.7
Did not state (NA)	15	2.3
Refused	2	.3
Missing	26	3.9
Total	659	100.0

Due to the high number of respondents that had participated in the survey, the age results provided never before viewed information for my organization and a transparent view of the age of our salesforce.

5.1.2 Tenure Frequency

Table 11 illustrates the frequency distribution of tenure within my organization, showing that the bulk of the salesforce has less than five years' experience with the company. Leaders within my organization have held beliefs that longer tenured associates may not be advocates for innovation and may even block successful innovation outcomes.

Table 11 Frequency Distribution of Tenure

	Frequency	Percent
0 - 5 years	313	47.5
6 - 10 years	131	19.9
11 - 15 years	126	19.1

16 or more years	89	13.5
Total	659	100.0

5.1.3 Gender Frequency

Table 12 illustrates the distribution of gender within my organization. The frequency distribution of gender is consistent with the actual gender distribution of employees in my company where the number of male employees are significantly higher than female employees.

Table 12 Frequency Distribution of Gender

	Frequency	Percent
Male	423	64.2
Female	236	35.8
Total	659	100.0

5.2 Summary Results

The results were generated through both the survey that I administered to my salesforce to explore individual perceptions and the existing business performance measures which has been described in earlier chapters. The survey data captured individual perceptions of successful innovation outcomes whereas the business performance measures reflected my organization's evaluation of successful innovation outcomes using established business metrics.

5.2.1 Sales Associate Perceptions of Innovation Outcome Success

Participants evaluated the six innovations on the extent to which they perceived each to have generated successful outcomes for customers, whether they believed each had a direct impact on their sales results, whether they would encourage a customer to use it and whether they would use the innovation themselves. All evaluations were measured on a 5-point scale. The lowest range of the scale or "1" indicated the least favourable perception while the highest range of the scale or "5" indicated the most favourable perception. Points, 2, 3 and 4 indicate the grades between the two extremes with 3 providing the most moderate or neutral choice.

The results of this survey will be described in subsequent sections of this chapter. I will begin with a summary in Table 13.

Table 13 Summary of Individual Perceptions of Innovation Success

Innovation	Perceived Successful Outcome for Customers	Perceived Impact on Own Sales Results	Encourage Customers to Use	Use Self	Overall
NCOB*	2.91	3.34	2.64	3.76	3.16
Customer First*	3.01	3.05	2.97	3.03	3.01
ISR*	2.92	3.04	2.94	2.99	2.97
Compensation	3.26	2.26	2.06	3.07	2.66
CRM*	1.66	2.26	2.93	3.00	2.46
Loyalty	1.86	2.13	2.69	3.05	2.43
Overall	2.6	2.68	2.7	3.15	2.78

Cells contain mean score for all sales associates, *n* = 659, where values above 3 indicate perceived positive outcome and values below 3 indicate perceived negative outcome. Innovations tagged * were supported by a transformation team.

The last column of Table 13 shows mean sales associate perception of the success of each innovation which is depicted as an average of the four perception scores: perceived successful outcome for customers, perceived impact on own sales results, whether the sales associate would encourage his/her customer to use the innovation themselves and whether the sales associate would use the innovation her/himself. The last row displays the overall average of this aggregated score across all of the studied innovations: 2.78. Three innovations were rated above the average: NCOB (3.16), Customer First (3.01) and ISR (2.97). These innovations were also supported by transformation teams during their implementation. The intention to use the innovation oneself, as reported by the sales associates was 3.15 and was the highest of the averages.

5.2.2 Business Performance Measures and Innovation Outcome Success

In addition to the individual perception summary, there are also business summary metrics. These metrics are depicted in Table 14 which shows summary results from organizational business metrics as they relate to the six studied innovations. The

results in this table have been ranked in terms of sales growth which is an easily understandable business objective.

Table 14 Summary of Results – Organizational Business Metrics

	Business Metrics from Organization					Successful According to ROI Objective
Innovation	**Sales Adoption Rate**	**Customer Adoption Rate**	**Customer Retention Rate**	**Sales Growth**	**Invest-ment**	
NCOB*	60%	75%	86%	8%	$1.5M	No
Compensation	68%	82%	90%	6.3%	12M	No
CRM*	80%	96%	92%	5.2%	3M	Yes
Customer First*	41%	50%	91%	3%	200K	Yes
ISR*	90%	93%	82%	1.5%	90M	Yes
Loyalty	95%	90%	88%	1.3%	900K	No
Overall	72%	81%	88%	4%	$17.6M	

*Transformation team supported innovation

Table 14 summarizes multiple data points from within my organization. The first column lists the six studied innovations along with whether they were supported by a transformation team. The following four columns then list success metrics as measured by my organization. These measures were defined in Chapter 4. The fifth column lists the investment that was made by my organization to implement the innovation. Finally, the last column shows whether my organization identified the innovation as successful. The average sales growth associated with the six innovations that were implemented was 4%, and three of the innovations scored over the mean: NCOB, Compensation and CRM.

Table 15 takes the business evaluation of the innovations one step further and displays my organization's evaluation of an innovation's success based on ROI not only for Year 1 of the innovation, but also examines Year 2 and Year 3.

Table 15 Summary of Results – Organizational Return on Investment

Innovation	**Successful According to ROI Objective Yr 1**	**Successful According to ROI Objective Yr 2**	**Successful according to ROI Objective Yr 3**
NCOB*	No	No	Yes

Innovation	Successful According to ROI Objective Yr 1	Successful According to ROI Objective Yr 2	Successful according to ROI Objective Yr 3
Customer First*	No	Yes	Yes
ISR*	Yes	Yes	Yes
Compensation	Yes	No	No
CRM*	Yes	Yes	No
Loyalty	No	No	No

*Transformation team supported innovation

Table 15 displays the ROI success factor set by my organization. The ROI was calculated for Year 1 of the innovation being implemented, as well as for the two years following. In Year 1, three of the six innovations were deemed successful using the ROI objective. In Year 2, three of the six innovations were deemed successful (with only one carryover from Year 1). In Year 3, three of the six innovations were deemed successful with only one innovation remaining consistently successful according to ROI from Year 1 to Year 3.

In Chapter 6, I will discuss why an individuals' perception of an innovation outcome succeeding or failing may differ from an organization's measurement of the same innovation. I will now take a deeper dive into both the individual and organizational data as it pertains to each empirical research question.

5.3 Empirical Research Question #1: How do demographic factors of age, tenure and gender relate to an individual's perception of an innovation outcome?

This section addresses the demographic factors of age, tenure and gender as they may be associated with successful innovation outcomes. Frequency tables and detailed data result summaries regarding this data may be found in Appendix H. Table 16 summarizes the associations that were observed through my research of demographic factors (tenure, age, gender) with successful innovation outcomes. Areas where I identified an association have been displayed in bold typeface.

Table 16 Demographic Association with Innovation Outcomes (Age, Tenure, Gender)

Innovation	Perceived Successful Outcome for Customers	Perceived Impact on Own Sales Results	Encourage Customers to Use	Use Self
NCOB*	Tenure=0 **Gender=1** Age=0	Tenure=0 **Gender=1** Age=0	**Tenure=1** Gender=0 Age=0	Tenure=0 **Gender=1** Age=0
Customer First*	Tenure=0 Gender=0 Age=0	Tenure=0 Gender=0 Age=0	Tenure=0 Gender=0 **Age=1**	Tenure=0 Gender=0 Age=0
ISR*	Tenure=0 Gender=0 Age=0	Tenure=0 Gender=0 Age=0	Tenure=0 Gender=0 Age=0	Tenure=0 Gender=0 Age=0
Compensation	**Tenure=1** **Gender=1** **Age=1**	**Tenure=1** Gender=0 **Age=1**	**Tenure=1** Gender=0 Age=0	Tenure=0 Gender=0 Age=0
CRM*	**Tenure=1** **Gender=1** **Age=1**	**Tenure=1** **Gender=1** **Age=1**	Tenure=0 **Gender=1** Age=0	Tenure=0 Gender=0 Age=0
Loyalty	**Tenure=1** **Gender=1** Age=0	**Tenure=1** **Gender=1** Age=0	**Tenure=1** Gender=0 Age=0	Tenure=0 Gender=0 Age=0

*Transformation team supported innovation. 0=no association; 1=association

Bold typeface displays where associations have been identified at 0.05

Table 16 displays factors that are associated with sales associates' perceptions of the outcomes of the six innovations: NCOB, Customer First, ISR, Compensation, CRM and Loyalty. Associations were found at 0.05 significance for all innovations except ISR. The following sections present greater detail regarding the five innovations where associations were identified.

5.3.1 Age

Participants were able to self-select from a range of ages. The goal was to determine if an association existed between age and other aspects of successful innovation outcomes. Table 17 shows association between age and perceived innovation success.

Table 17 Association between Age and Perceived Innovation Outcomes

Innovation	Perceived Successful Outcome for Customers	Perceived Impact on Own Sales Results	Encourage Customers to Use
Customer First*			46 – 55 years → least negative 3.15
Compensation	46 – 55 years → least negative (3.45)	20 – 25 years → least negative (2.53)	
CRM*	56 years or older → least negative (1.87)	20 – 25 years → least negative (2.74)	

Sales associate age was associated with the perceived success of three of the six innovations. Workers aged 46 to 55 had the strongest perceptions that the Compensation innovation had successful outcomes for customers (mean = 3.45) and were the most likely to report that they encouraged customers to use the Customer First innovation (3.15). The oldest workers in the study shared other sales associates' perceptions that the CRM innovation did not have successful outcomes for customers, but were less negative about it than younger workers (56 and older = 1.87). The youngest workers in the survey (20 to 25 year olds) shared the perception of others that the Compensation and CRM innovations had a negative impact on their own sales results, but differed by being the least negative (Compensation = 2.53, CRM = 2.74).

These results were unexpected because management had the perception, aligned with the literature that age differences were similar for all innovations implemented for the sales forces, and furthermore that age differences would all be in the same direction, with younger workers more likely than older workers to view innovation outcomes as successful. Instead, there was little difference by age, the differences were limited to only three of the six innovations, and older and younger workers

perceived those innovations to be more successful on different measures of innovation outcomes. The implications of these results are discussed in Setion 6.1.1.

Older workers had the greater incidence of associations between perceptions and innovations. Sales associates 46 years old and older demonstrated an association on perceived successful outcomes for customers for Compensation and CRM innovations and associations with encouraging customers to use the Customer First innovation. Sales associates aged 20 to 25 years of age demonstrated an association on perceived success of innovation outcomes on his/her own business results for the Compensation and CRM innovations.

5.3.2 Tenure

In this section, I will discuss the association of tenure with a variety of innovation outcomes factors. Table 18 reports summary results for exploring the association of tenure with characteristics of different innovations.

Table 18 Association between Tenure and Perceived Innovation Outcomes

Innovation	Perceived Successful Outcome for Customers	Perceived Impact on Own Sales Results	Encourage Customers to Use
NCOB*			11 years or more → least negative (2.8)
Compensation	6 years or more → most positive (>3.11)	11-15 years → least negative (2.6)	16+ years → least negative (2.6)
CRM*	11-15 years → least negative (2.16)	11-15 years → least negative (2.46)	
Loyalty	11-15 years → least negative (2.17)	11-15 years → least negative (2.4)	11 years or more → least negative (11-15 = 2.75; 16+ = 3.02)

This table identifies NCOB, Compensation, CRM and Loyalty innovations that were perceived by longer-serving sales associates to have a stronger positive impact on their customers than more recently appointed sales associates. Sales associates with

more than 10 years' tenure also perceived the Compensation innovation to have a stronger positive impact on their own business performance than sales associates who had been with my organization for less time. Similar to the discussion with the age demographic, the weak tenure and perception relationship is contrary to the popular organizational belief that longer tenured employees will be more reluctant to participate in innovation and will perceive innovation outcomes more poorly. Overall, there are differences for four, but not all of the innovations as well as a pattern of positive perceptions of innovation outcomes across the innovations where I observed differences.

5.3.3 Gender

Respondents were able to self-select their gender on the survey. Table 19 shows associations between gender and the perceived success of the studied innovations.

Table 19 Association between Gender and Perceived Innovation Outcomes

Innovation	Perceived Successful Outcome for Customers	Perceived Impact on Own Sales Results	Encourage Customers to Use	Use Self
NCOB*	Females (3.03) > males (2.83)	Males (3.45) > females (3.15)		Males (3.85) > females (3.59)
Compensation	Males (3.32) > females (3.15)			
CRM*	Females (1.93) > males (1.51)	Females (2.40) > males (2.18)	Females (3.10) > males (2.84)	
Loyalty	Males (3.45) > females (3.15)	Females (2.30) > males (2.04)		

Female and male sales associates had different perceptions of the outcomes of the NCOB, CRM, Loyalty and Compensation innovations. There were differences in the perceived outcome for customers of all four innovations; perceived impact on own business results for NCOB, CRM and Loyalty, and on intention to continue use for NCOB only. Where ratings were negative on average (perceived impact on customers for NCOB and CRM and perceived impact on own business result for CRM and Loyalty), females were less negative than males. On the other hand, where average perceptions were positive (perceived impact on customers for Loyalty and

Compensation, and perceived impact on own business result and intention to continue use for NCOB), males were more positive than females. This is a significant finding for my organization and more detail will be discussed in Chapter 6.

5.4 Empirical Research Question #2: What factors do sales people perceive may be associated with successful innovation outcomes?

Survey respondents were given a list of nine factors to consider how they may influence successful innovation outcomes. These scores were reported in such a way that the individual scores of the nine factors would total 100. The approach of utilizing factors in this manner was informed by Pullig et al. (2002). Associations of these factors were then evaluated relative to the mean score: Above Average, Average and Below Average. Table 20 displays descriptive statistics for perceived impact score of nine factors that the participants evaluated as they related to successful innovation outcomes.

Table 20 Sales Associates Assessment of Impact of Nine Factors on Successful Innovation Outcomes

	Mean	SD	Impact
Incentives	20.12	8.6	Above average (Highest)
Training Sales Associates	12.41	6.48	Above average
Support to Sales Associates	12.4	6.46	Above average
Trust	11.98	6.98	Average
Customer Focus	11.89	6.74	Below Average
Competitive Differentiation	10.23	5.54	Below Average
Encouragement/Leadership	9.76	5.08	Below Average
Ability to Share Best Practices	9.57	5.18	Below Average
Entrepreneurial Values	9.55	5.73	Below Average
Overall	*11.99*		

Table 20 is sorted on the average score given by the sales associate, from highest level of importance to lowest. The average of these nine factors is 11.99. Incentives were the most important factor perceived to positively affect successful innovation outcomes with an average score of 20.12, well above the average. Other above average factors were training for sales associates (12.41) and support for sales

associates, customer focus and trust. Average score was attained by trust (11.98). Below average but in the top five of the factors was customer focus (11.89).

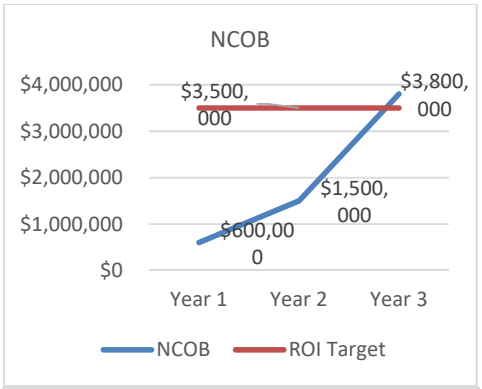
To compare the six studied innovations and whether they employed training and/or incentives, refer to Table 21 which outlines where training was used and where incentives were employed. Training was used in all of the six innovations. Explicit incentives were used in three of the innovations: NCOB, Customer First and ISR.

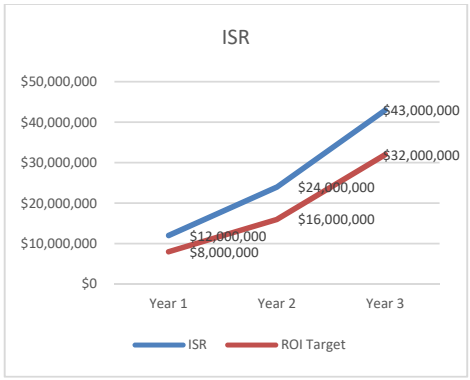
Table 21 Innovations which Employed Incentives and Training

Innovation	Incentives Used?	Training Used?
NCOB*	Yes	Yes
Customer First*	Yes	Yes
ISR*	Yes	Yes
Compensation	No	Yes
CRM*	No	Yes
Loyalty	No	Yes

5.5 Empirical Research Question #3: How does perceived success of innovation outcomes relate to business measures of innovation success?

This section compares the individual sales associates' perceptual evaluations of innovation outcomes to the organization's evaluation against the key business metric of ROI. Figures 3 and 4 show the three year ROI targets and performance of each innovation against these business metrics. Figure 3 shows those innovations with successful ROI outcomes, while Figure 4 shows those that did not meet the established ROI outcomes for the business.





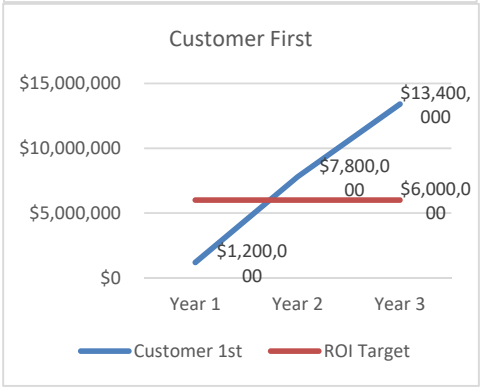


Figure 3 Actual and Target three year ROI outcomes for innovations that successfully met their ROI target

Overall, ISR met its ROI target in all three years, Customer First only exceeded its ROI target in Years 2 and 3, and NCOB only in Year 3. These were also the three innovations that were perceived most positively by sales associates as shown in Table 13: NCOB (3.16), Customer First (3.01) and ISR (2.97). It appears that user perceptions of innovation outcome success can act as a leading indicator of actual business success.

With respect to the unsuccessful innovations, the Compensation innovation met its ROI target in Year 1, it failed to meet target in subsequent years. CRM met its ROI target in Years 1 and 2, but not in Year 3, and the Loyalty innovation failed to meet its ROI target in all three years. These innovations not only failed to meet ROI over three years but also were perceived by sales associates to be the least successful: Compensation (2.66), CRM (2.46) and Loyalty (2.43). Figure 4 further illustrates the unsuccessful innovations.

Figure 4 Actual and Target three year ROI outcomes for innovations that did not meet their ROI target

Although not successful by all perceptual measures, sales associates did perceive NCOB to have successful outcomes, overall. ROI results in Year 1 did not indicate success. When compared to Year 2 and Year 3 ROI results, however, the perceived success by the sales associates in Year 1 to be a success was eventually matched by organizational success through ROI.

Figure 5 displays Year 1 through Year 3 ROI for both organizational outcomes and individual perceptions for the Customer First innovation.

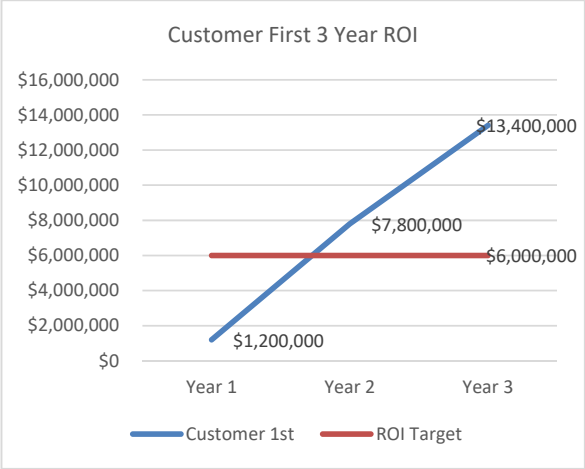


Figure 5 Organization Outcome Success vs Individual Perceived Innovation Success Year 1 through 3 ROI Customer First Innovation

Sales associates perceived NCOB to have successful outcomes. ROI results in Year 1 did not indicate success. When compared to Year 2 and Year 3 ROI results, however, the perceived success from the sales representative was eventually matched by organizational success through ROI.

Figure 6 displays Year 1 through Year 3 ROI for both organizational outcomes and individual perceptions for the ISR innovation.

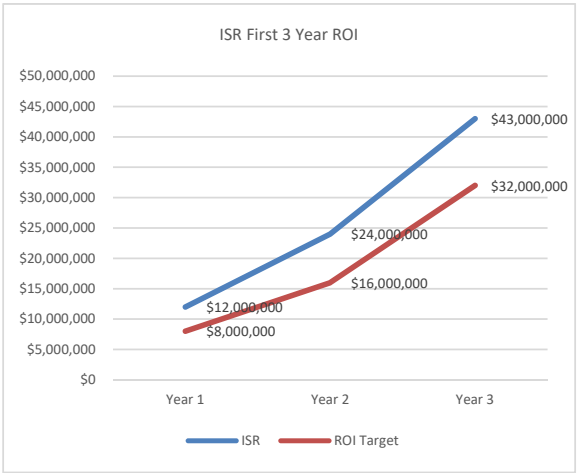


Figure 6 Organization Outcome Success vs Individual Perceived Innovation Success Year 1 through 3 ROI ISR Innovation

Sales associates perceived ISR to have successful outcomes. ROI results in Year 1, 2 and 3 were also successful.

Figure 7 displays Year 1 through Year 3 ROI for both organizational outcomes and individual perceptions for the Compensation innovation.

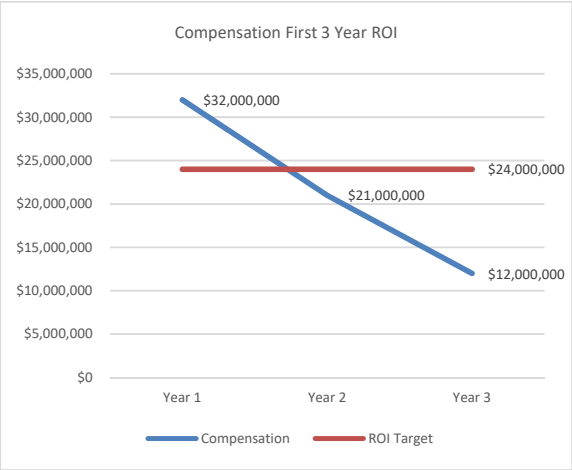


Figure 7 Organization Outcome Success vs Individual Perceived Innovation Success Year 1 through 3 ROI Compensation Innovation

Sales associates perceived Compensation to have unsuccessful outcomes. ROI results in Year 1 indicated success. When compared to Year 2 and Year 3 ROI results, however, the perceived success from the sales representative was eventually matched by organizational lack of success through ROI.

Figure 8 displays Year 1 through Year 3 ROI for both organizational outcomes and individual perceptions for the CRM innovation.

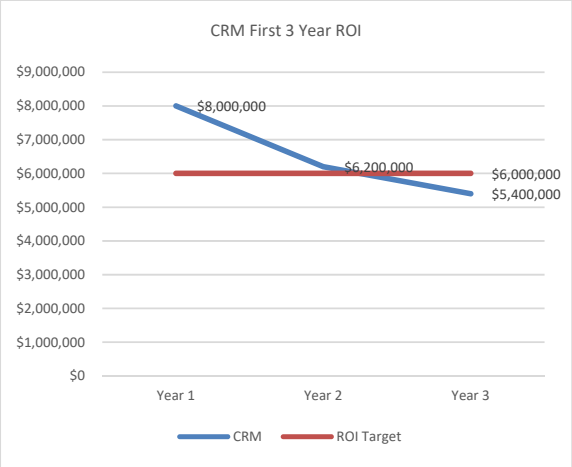


Figure 8 Organization Outcome Success vs Individual Perceived Innovation Success Year 1 through 3 ROI CRM Innovation

Sales associates perceived CRM to have unsuccessful outcomes. ROI results in Year 1 and 2 indicated success. In Year 3, however, the ROI indicated an unsuccessful innovation outcome.

Figure 9 displays Year 1 through Year 3 ROI for both organizational outcomes and individual perceptions for the Loyalty innovation.

Figure 9 Organization Outcome Success vs Individual Perceived Innovation Success Year 1 through 3 ROI Loyalty Innovation

Sales associates perceived Loyalty to have unsuccessful outcomes. ROI results in Year 1, 2 and 3 all indicated lack of success as well. The results of my research indicate an

association between perceived success of an implemented innovation and an organizational measure of success by Year 3 of an innovation's lifecycle.

I utilized odds ratios to further explore associations that may exist between the individual perception of success and organizational success. This measures association between innovations which are perceived successful by sales associations with innovations that have either experienced success or not using business metrics. The goal is to better understand if an association exists between perceived success vs actual success through Years 1, 2 and 3 after implementation. These results, expressed year after year, will be displayed in the following tables. Table 22 displays the odds ratio between individual perception and organizational success for Year 1.

Table 22 Odds Ratio Individual vs Organizational Success Year 1

	ROI Year 1 Not Successful (Organization)- 3	ROI Year 1 Successful (Organization) - 3	Total	Rate	Odds
Innovations Perceived Successful Year 1 (Individual) - 3	2	1	3	0.33	0.5
Innovations Not Perceived Successful Year 1 (Individual) - 3	1	2	3	0.66	2
Total	3	3	6		

*95% confidence interval

In Year 1, there was an odds ratio of 0.25 that an innovation perceived by individuals to be successful would be successful in organizational terms.

Table 23 displays the odds ratio between individual perception and organizational success for Year 2.

Table 23 Odds Ratio Individual vs Organizational Success Year 2

	ROI Year 2 Not Successful (Organization)- 3	ROI Year 2 Successful (Organization) - 3	Total	Rate	Odds
Innovations Perceived Successful Year 1 (Individual) - 3	1	2	3	0.66	2
Innovations Not Perceived successful Year 1 (Individual) - 3	2	1	3	0.33	0.5
Total	3	3	6		

In Year 2, there was an odds ratio of 4 that an innovation perceived by individuals to be successful would be successful in organizational terms. Practically speaking, innovations perceived by individuals in year 1 to be successful were 4 times more likely to be successful than not by year 2.

Table 24 displays the odds ratio between individual perception and organizational success for Year 3.

Table 24 Odds Ratio Individual vs Organizational Success Year 3

	ROI Year 3 Not Successful (Organization) - 3	ROI Year 3 Successful (Organization) - 3	Total	Rate	Odds
Innovations Perceived Auccessful Year 1 (Individual)- 3	0	3	3	1	Infinity
Innovations Not Perceived Successful Year 1 (Individual) - 3	3	0	3	0	0
Total	3	3	6		

In Year 3, individual users' perceptions of success provided a perfect prediction of organizational success by year 3.

5.6 Empirical Research Question #4: What role do increased sales results play in an individual's perception of successful innovation outcomes?

In examining the potential association between increased sales and successful innovation outcomes, descriptive statistics were generated. Table 25 compares sales associates' mean overall perception of success (mean score on all measures for all innovations) for innovations that met the organization's target for increased sales in Year 1 with those that did not meet the target.

Table 25 Comparison of Increased Sales with Innovations

Success	N	Mean	Std. Deviation	t	p
No	3	2.75	3.482	0.094	.930
Yes	3	2.81	2.514		

The data indicates that mean perceived sales results are slightly higher for innovations that met my organization's requirement for increased sales than for those that did not meet it. Furthermore, there is less variation in perception. This data does indicate that there is a strong possibility that there is no difference in the mean, even though there is adifference in variation, so individual perceptions of sales results may very well be the same across successful and unsuccessful innovation outcomes as measured by the organization.

5.7 Empirical Research Question #5: What association do business transformation teams have on both individual perception and organizational measurement of successful innovation outcomes?

The studied innovation programs consist of six innovations, four of which were implemented using a business transformation team (NCOB, Customer First, ISR, and CRM). The job of this cross-functional team was to support the implementation to drive both individual perceptions of the innovation as well as the organizational results to deliver successful innovation outcomes.

I then compared the ratios of successful to unsuccessful innovations to understand the likelihood that business transformation teams would have an association with successful innovation outcomes. The three innovations that realized ROI success in

Year 1 (ISR, Compensation, CRM) were related to the three innovations that did not realize ROI success in Year 1 (NCOB, Customer First, Loyalty). I then compared the innovations which utilized transformation teams (NCOB, Customer First, ISR and CRM) and those that did not. This same exercise was then calculated for Year 2 and Year 3. Table 26 displays Year 1.

Table 26 Ratios of Successful to Unsuccessful Innovations and Transformation Teams Year 1

	No Transformation Teams - 2	**Transformation Teams - 4**
ROI Success (Yr 1)	1	2
No ROI Success (Yr 1)	1	2

There was a 66.67% chance that transformation teams would lead to ROI success in Year 1. There was also a 66.67% chance that transformation teams would lead to no ROI success in Year 1. This odds ratio of 1 indicates that in Year 1 it was equally likely that an innovation supported by a transformation team would be a success or not.

Table 27 displays the ratios of successful to unsuccessful innovation and transformation teams Year 2.

Table 27 Ratios of Successful to Unsuccessful Innovations and Transformation Teams Year 2

	No Transformation Teams - 2	**Transformation Teams - 4**
ROI Success (Yr 2) - 3	0	3
No ROI Success (Yr 2) - 3	2	1

In Year 2, there was a 75% chance that transformation teams may be associated with ROI success and a 25% chance that transformation teams would lead to no ROI success. In Year 3, there was a 75% chance that transformation teams would lead to ROI success and a 25% chance that transformation teams would lead to no ROI

success. The odds ratio is 1.5, meaning that innovation supported by transformation teams are 50% more likely than those without transformation teams to be successful. These results for Year 3 are displayed in Table 28.

Table 28 Ratios of Successful to Unsuccessful Innovations and Transformation Teams Year 3

	No Transformation Teams - 2	**Transformation Teams - 4**
ROI Success (Yr 3) - 3	0	3
No ROI Success (Yr 3) - 3	2	1

5.8 Chapter Summary

This chapter outlined the results which emanated from the quantitative survey. The empirical evidence gathered from the quantitative survey delivered to my Canadian wholesale food company indicate that there are a number of factors which must be considered in order to generate successful outcomes from innovation. Key findings that were highlighted in this chapter include the understanding that both individual and organizational evaluations of success must be considered when trying to create successful innovation outcomes. Both business transformation teams and incentives may help improve successful outcomes of innovation as well as understanding the big picture benefits. There were also some age and tenure associations with successful innovation outcomes that will be discussed further in Chapter 6. In this next chapter I will discuss these findings and put them into context of managerial implications within my organization.

Chapter 6 Discussion and Practical Implications

6.0 Introduction

The purpose of my action research study was to achieve three main objectives: 1) Better understand the factors which may improve the success of innovation outcomes, 2) Seek an understanding of innovation outcomes through the individual perceptions of my organization's sales associates as well as through the lens of business goals and 3) Provide insights to my organization to better support movement toward successful innovation outcomes and create practical business benefits.

After conducting a scholarly literature review, I developed and administered a questionnaire to the front-line sales force of my organization and this, along with primary business metrics from my organization were utilized to achieve these objectives and to answer the empirical research questions addressed in the survey. This chapter discusses the survey results as they relate to the literature and also discusses the practical implications for my organization. How these implications were put into action within my organization will be discussed in Chapter 7.

6.1 Demographic Factors and Individual Perception of Successful Innovation Outcomes

6.1.1 Age and Individual Perceptions

With respect to the association of age, my literature review provided inconclusive results relating to the association between individual age and the individual's perception of innovation outcomes. Schubert and Andersson (2015) found that innovation adoption and successful innovation outcomes decreases as average employee age increases while Ng and Feldman (2009, 2013) failed to find an association with age, instead suggesting that individual personality and character composition is more important.

The results of my research do not precisely corroborate these findings as I found more association with successfully perceived innovation outcomes among my

organization's oldest cohort (46 years+) which was followed closely by my organization's youngest cohort (20 to 25 years). It would be difficult then to state that age is associated with perceived innovation outcomes.

This conclusion is not aligned with my organization's current thinking and approach when it comes to age of our workforce, particularly our sales associates. I would suggest that we should consider a profound shift in how we think about the workforce. As the workforce demographics continue to age with the retirement of the Baby Boomer cohort and the progression of Millennial and Generation Z through the organization, this will no longer be an area that can be treated based on instinct and will instead need to be directed by knowledge created through action research. For example, we may currently perceive older workers as in their latter stages of their career and not able to cope with the change that innovation may bring. Knowing that this is actually not evidence-based could open up many windows to further utilize our workforce when deploying innovation.

6.1.2 Tenure and Individual Perceptions

Ng and Feldman (2013) asserted that advanced tenure might be viewed in a negative light when an organization is innovating. This is a belief from certain leaders within my organization where it was voiced that longer tenured associates have a difficult time adapting to changes and innovation. The inverse of this belief is that workers that are new to the organization may have a greater propensity toward positively perceiving innovation than do associates who have worked within the organization for a longer period. However, some have suggested that tenure and positively perceived innovation outcome may be positively related if individuals with greater tenure have superior practical knowledge and are better able to implement innovation (Steffins et al., 2014).

Within my survey I found some association between tenure and positively perceived innovation outcomes with respect to the NCOB, CRM, Compensation and Loyalty innovations. Sales associates with more than 10 years tenure perceived the Compensation innovation as having a stronger impact on their evaluation of

successful innovation outcomes than sales associates who had been with my organization for less time. My results are similar to those obtained by Steffins et al. (2014) in that I found that sales associates with longer tenure (most prominently, between 11 and 15 years) were more positive (or, to be precise, less negative) about some outcomes of some innovations than those who had been with my organization for less time.

It was surprising to see that longer tenure was associated with less negative (or, in the case of the Compensation innovation, more positive) perceptions. Longer tenured sales associates may have been more positive about the inward-facing Compensation innovation because, in line with Steffins et al. (2014), they were better able to leverage the innovation to obtain better results for themselves and their customers. They may also be better able to implement the CRM and Loyalty innovations given their long experience in the company and providing customer service. On the other hand, these associates may have provided similar ratings to those with less tenure for innovations that introduced substantially new practices to their work, with which no group was more familiar than any other. Longer tenured sales associates were also more likely to encourage their customers to use selected innovations, again perhaps because their experience provides them with knowledge that enables them to see advantages for their customers and, consequently for their own business results.

It is also interesting to observe innovations where no associations with tenure were found: Customer First and ISR. An innovation such as Customer First may be so commonplace in other organizations or so familiar to an individual from his/her own life as a consumer that it might not be viewed as innovative as other “innovations” that are deployed through my organization. It could also be that these two innovations may be viewed as more helpful to a sales associate as they provide greater insight in the mindset of customers.

Practically speaking, my organization cannot easily or quickly alter the age or the tenure of its workforce. What it can do, however, is understand that the association between tenure and positively perceived innovation outcomes may exist and build this knowledge into future innovation plans. Identifying that all tenures are viewed as potentially related to innovation outcome may allow the overall sales team to be further supported to ensure success. In organizational terms, this would mean ensuring that all tenured associates have access to additional resources and training in order to successfully implement innovation. It may also be prudent to pair shorter tenured workers with longer tenured workers. This could create a balanced approach leading to successful innovation outcomes. For example, ensuring that all tenured workers fully understand the financial and personal benefits that can be derived from successful innovation may support its successful outcome.

6.1.3 Gender and Individual Perceptions

With respect to gender, previous literature has also found varying results with respect to the association between gender and positively perceived innovation outcomes. One study that did focus upon gender found that males were more closely oriented toward successful innovation outcome when compared with females (Pretorius et al., 2005). The research suggested that males might perceive more successful innovation outcomes than females, with females having a lower propensity to realize successful outcomes with innovation. The results of my research found some differences between genders with higher perceptions of success among females as compared with males in the NCOB, CRM and Loyalty innovations.

My research did not provide any evidence to suggest that my organization should take a more gender-differentited approach to innovation to generate any different outcomes. Although my organization has a greater proportion of males than females within its workforce, this proportion may vary across departments or teams. There are traditionally female disciplines or functions within my organization such as Human Resources, Marketing and support or administrative roles. In my

organization's sales organization, which is the target of this study, the gender division is weighted heavily toward male.

6.2 Individual Success Factors and Individual Perceptions

The nine factors introduced by the Pullig et al. (2002) study were examined for their perceived association with influencing successful innovation outcomes within my organization. The largest association was found in relation to incentives offered, followed by training and support to sales associates, which was then followed by trust and customer focus factors. The smallest association was found with respect to the ability to share best practices, entrepreneurial values, and encouragement and leadership factors. Additionally, results indicated that the mean association score across the nine factors significantly differed, with the incentive factor being significantly higher than all remaining factors. Sales associates believe that incentives will have among the highest impact on innovation outcomes. Pullig et al. (2002) study found that successful innovation outcomes may be enabled through trainng, encouragement, leadership and organizational support. Shared values may include customer orientation, adaptive culture, information sharing, entrepreneurial values and trust. I have summarized a comparison of the Top 3 results from my success factor research with Pullig et al. (2002) Top 3 results in the below Table 29.

Table 29 Comparison Success Factors My Research vs. Pullig et al. (2002)

My Research	Pullig et al. (2002) results
Incentives	Training
Training	Encouragement
Organizational Support	Organizational Support

Pullig et al. (2002) study did not discover that incentives were associated with successful innovation outcomes. One observation regarding this is that my research focused on a business to business organization while the Pullig study focused on business to consumer. For my research, not all of the studied innovations employed incentives and/or training. For the six studied innovations, incentives were provided

to sales associates for three of the innovations: NCOB, Customer First and ISR. Interestingly, these were also the three innovations which scored the highest from an individual's perception of successful innovation outcomes and were also the innovations which returned successful ROI in Year 3 of the study.

For my organization, incentives and training are simple levers to pull because they are within the realm of control. Training and support can take on many forms and can be coupled with incentives to help sales associates be part of successful innovation outcomes. Understanding how these factors, however, relate to the successful outcome of innovation, can be more complex. When examining an environment that will be optimal for successful innovation outcomes, my organization may need to consider that the factors that are enabled by the organization can play a role in supporting success. Training programs that assist managers in supporting front-line associates who implement innovation and coaching programs that help managers learn different ways to encourage their teams may aid in successful innovation outcomes.

6.3 Individual Perceived Successful Outcome vs. Organizational Successful Outcome

Perceived impact of innovation was highest for NCOB (3.16), Customers First (3.01) and ISR (2.97). All three of these highest-ranking innovations were supported by a business transformation team. This could indicate that the support of a business transformation team could lead to higher scores on overall perceived innovation successful outcome. This observation is corroborated by Beaumont et al. (2017) who indicated that having cross-functional teams creates higher favourability within an organization because stakeholders recognize members of their own functional team as part of the implementation effort creating proxy ownership. Another interesting data point from the individual results is that the score for an individual's inclination to use the innovation is higher than the other individual perception scores. That is, an individual registered higher likelihood to use the innovation than the likelihood of encouraging their customer to use or than their individual perception of innovation successful outcome.

Using the business metrics of sales adoption, customer adoption, customer retention, sales growth and investment made, each innovation was scored. The ROI for each innovation was tracked over three years post implementation. In Year 1, three of the six innovations were deemed successful using the ROI objective. Two of these innovations utilized transformation teams. In Year 2, three of the six innovations were deemed successful (with only one carryover from Year 1), with all three of these innovations supported by a transformation team. In Year 3, three of the six innovations achieved successful ROI, and all of them were supported by a transformation team. Only one innovation - ISR which was supported by a transformation team - was consistently successful according to ROI from Year 1 to Year 3.

Using Year 1 ROI data and comparing it against overall individual perception data, there does not appear to be an association. In other words, an individual's perception of perceived successful outcome does not relate to an organization's outcome in Year 1. In this review, only ISR was perceived to have a successful outcome by an individual and was tracked as successful by the ROI figure by the organization. In Year 3, however, something interesting happens. In this study, the individual perceptions of perceived successful outcomes were highest for NCOB, Customers First and ISR. By Year 3, the innovations which were deemed successful according to the set ROI objectives were NCOB, Customers First and ISR. This indicates that an individual overall perception of successful outcome during the earliest part of an innovation could be related to the innovations eventual outcome of success by an organization's standpoint. This could be attributable to having more time for an innovation to entrench, more time for the heavier investments to pay off and more time for the innovation to acculturate.

6.4 Increased Sales Results and Individual Perception of Successful Innovation Outcomes

I observed a slightly higher mean perceived sales increase for innovations that also met my organization's sales objectives. It has been suggested in the literature that sales-related innovation may allow organizations to more easily provide accurate

and timely information to customers (Bondra and Davis, 1996), which may also have the effect of further increasing sales or profit margins. Sales-related innovation outcomes may be associated with a series of benefits, including allowing for information to be more readily available, customer feedback being more easily received and acted upon, and helping to ensure that non-sales-related associates are more knowledgeable in order to provide support for the organization. Additionally, it has been suggested that sales -related innovation outcomes may have the strongest association with sales force performance (Keillor et al., 1997). The results of this study did confirm these previous results, particularly over time as increased sales results were found to be associated with successful innovation outcomes.

Practically speaking, when a front-line sales associate decides to implement an innovation, there can be far reaching economic consequences, including impact to individual compensation, impact to commercial transactions with customers and impact to the profitability of an organization. The literature asserted that organizations might benefit in ensuring that stakeholders are fully aware of the benefits and the personal value that can be generated through the successful outcome of innovation (Barker et. al, 2009). From my own survey results over a three year period there was an association between perceived innovation success by an individual and results by the organization. Whether the returned benefit is time efficiencies, financial return or increase in business volume, if the individuals who are responsible for implementing the innovation understand these benefits, the innovation will have a greater chance of being successfully implemented.

The managerial implications for these findings are clear: Ensure that the agents who are responsible for executing the innovation understand the benefits of it. Employ thought leaders to help shape positive perceptions of innovation. Ensure that the credibility of the innovation is sound by communicating clearly and competently. This credibility will give the associates confidence to share the innovation with other stakeholders in a positive way. When I shared these findings with sales leaders within my organization, there was a realization that the credibility issue played a

larger role than initially thought. Sales associates who did not feel confident with the innovation would use terminology such as “this is something that management wants me to show you”, as opposed to “I have something great to show you that is going to help your business”.

6.5 Business Transformation Teams and Individual Perception/Organizational Measured Successful Innovation Outcomes

As outlined in Chapter 2, the business transformation team (Jacoby, 2018) or cross-functional team (Gaynor, 2002) or agile team (Beamont et al., 2017) is a common term in business and refers to a specialized unit which is dedicated to assisting with the change management process that is often associated with successful innovation outcomes. Of the six studied innovations, four innovations (NCOB, CRM, ISR and Customers First) utilized transformation teams. In Year 1, 1 of the 4 transformation team supported innovations had ROI success. In Year 2, 3 of the 4 transformation team supported innovations had ROI success. In Year 3, 3 of the 4 transformation team supported innovations had ROI success. It appears that transformation teams are associated with individual perceptions of success and in organizational measures, particularly over alonger period of time. As well, the odds ratio identified in Chapter 5 indicate that innovation supported by transformation teamsa are 50% more likely to be successful. While transformation teams may be associated with more successful outcomes, success is still not a certainty. With regard to the literature, it would be expected that business transformation teams support the learning process that is required to create successful innovation outcomes. This was found to be the case based on the results of the current study. The finding that business transformation teams may have an association with successful innovation outcomes provides support to Drucker’s (1998) position that a system-wide involvement of all departments is essential to prevent innovation failure.

Innovations which are supported by business transformation teams were far more likely to generate successful outcomes than those that did not benefit from this support. These differences help to highlight the requirement for whole organization support, as well as collaboration between the technology department which

normally employs the business transformation teams, and the field business leaders who normally are charged with implementing the innovation. Both departments within an organization are accountable for achieving the overall mission of an organization and will need to work together to accomplish business objectives in terms of successfully implementing innovation. Business often relies on the technology department to provide business transformation support while the technology department relies on the business to actually implement and adopt the innovation. This can be the case whether it is a purely technical innovation, or perhaps just a process innovation which still requires project management or changes to existing systems in order to be implemented. An informed collaboration between business leaders in the field, project managers and technology leaders can create a solid foundation for innovation to be successful implemented and leveraged, allowing organizations to continue to evolve and thrive.

Creating a specialized team to assist with the implementation of a specific innovation requires planning and intentional management. The team works within the innovation plan, provides support, feedback and helps refine the plan based on the process itself. It is an agile team that is responsive to new findings throughout the implementation process. It stands to reason that utilizing this type of team during the innovation process would improve the success of innovation outcomes based on the fact that there would be more cross-functional support and enhanced communication.

As an outcome from this research and further discussion within my practice, guidance for managers within my organization has emerged: employing a business transformation team may be associated with more successful innovation outcomes. Knowing the objections which are voiced above by my organization's leaders can assist with strategies to overcome them. Practically speaking, this knowledge may also assist with budget planning for my organization as we allocate financial resources for innovation projects.

6.6 Key Understandings

This study of factors which may improve the success of innovation outcomes, both perceived and as measured by business performance metrics, have allowed several key understandings to emerge. These understandings may have the capacity to be embedded within my organization's processes and routines to help improve the success of innovation outcomes. Table 30 presents a summary of four key understandings that have emerged from my research and are described in practical terms, presented in context of scholarly works and practical application.

Key Understanding from my research	Sources from the Literature	Application to my Organization
Key Understanding 1: Individual perceptions as well as organizational practical performance metrics must be taken into consideration in order to create successful innovation outcomes.	The need for individual acceptance (Shaw and Burgess, 2013), commitment to utilize (Pullig et al., 2002; Schumpeter, 2008; Gupta, 2011), understanding (Klein, 2005) and/or positive view of innovation (Simpson et al., 2006; Keillor et al., 1997) is well documented in the literature.	Monitoring individual perception of success knowing that these individual perceptions may be associated with long-term organization success of the innovation. Keeping regular checks on these perceptions may allow my organization to pivot strategy if we find that we are not on track with individual perceptions. In the case of my study, individual perceptions were measured after the fact and too late to make any impact or changes to the innovation that was being deployed

Key Understanding 2: Enlisting the support of a dedicated business transformation team may assist in successfully implementing innovation by removing barriers, clarifying and setting context for the innovation.	Although these teams or support units may have different labels in the literature, the notion of having this support team in place is supported (Jacoby, 2018; Beaumont et al., 2017; Herr and Anderson, 2005).	
Key Understanding 3: Multiple enabling factors may contribute to successful innovation outcomes.	Pullig et al. (2002) found that successful innovation outcomes may be improved through trainng, encouragement, leadership, organizational support, customer orientation, adaptive culture, information sharing, entrepreneurial values and trust.	Focus on customer and benefits should be outlined. Incentives and trainng may be associated with perceived successful innovation outcomes and should be included during the implementation process.
Key Understanding 4: Show no Bias toward Demographic Factors	Similar to my research findings, Ng and Feldman (2009, 2013) failed to find an association with age, instead suggesting that individual personality and character composition is more important to the outcome of an innovation. With respect to tenure, Steffins et al. (2014) found that associates with	With respect to demographic factors, older workers should be included alongside younger workers, more tenured workers should be included alongside less tenured workers and males and females should work alongside each other when working with innovation without fear of

	longer tenure had more positive perceptions about some outcomes of some innovations.	negative association on perceived innovation outcomes

Table 30 Key Understandings in Context of Literature

In Chapter 7 I will describe how I took these four key understandings to my leadership team to discuss and then creation action from the understandings. The intention with this step is to put some of the key understandings into action and gain an understanding of whether they were effective.

6.7 Chapter Summary

Innovation is imperative within business, and perhaps even more so within the wholesale food channel in Canada due to marketplace nuances and heightened competitive pressures. As the requirement for innovation continues to accelerate, so will an organization's need to better understand how to effectively facilitate the successful outcome of said innovation within their organization for the purposes of generating sustainable prosperity.

This research provided insight into the factors which can improve or limit successful innovation outcomes, as both perceived by the individual and measured by the organization within a wholesale foodservice distributor setting. The information gathered from this research helped identify key understandings which may be associated with perceived successful innovation outcomes. In Chapter 7, I will discuss how these understandings were put into action within my own organization, along with the ensuing results.

Chapter 7 Putting Research into Action

7.0 Introduction

In this chapter I demonstrate the action that was taken within my organization following my survey research. I describe the methodology that I used, the data sources, the sample/participant characteristics and design of my post-quantitative action research. This stage describes the key understandings of the research, the methodology of putting it into action within my organization, the action that I then took and the organizational outcomes of this process. The goal of this stage was to explore the second research question that I identified in Chapter 1:

RQ2: What actions could my organization put into place to help improve the success of innovation outcomes?

I explored this research question by taking the key understandings that emerged from my survey research into Research Question #1 and were presented in Chapter 6, and then using them to take action within my organization.

7.1 Planning and Preparation

I wanted to discuss the results from my survey with the leadership team of my organization and share with them the four key understandings that I discussed in Chapter 6. This occurred two months after my survey concluded. There are seven members of the leadership team and they had sponsored my initial research and were invested in the results. Their support was also required for this phase of my study, putting what we learned in the quantitative phase to action within our organization. They are characterized as follows in Table 31.

Table 31 Participants in Pre-Research Action

Position	Comment
President	This position oversees the Canadian foodservice operations. All of the branch locations and personnel report through this position.
VP Sales	This position is responsible for the sales force and the customers.
VP Merchandising	This position is responsible for procurement, sourcing, category management and supply chain.
VP Finance	This position oversees the financial reporting and auditing of the organization.
VP Operations	This position oversees our logistics and distribution network.
VP HR	This position is responsible for the associates that work for my organization, the programs, and development and recruiting of our people resources.

In all, I conducted three workshops with my organizational executive leadership team: two prior to taking action within my organization and one post-action. The workshops were preceded by a summary of the survey findings which was sent to each of these organizational leaders as a pre-read. I also documented and collected data such as meeting minutes and action steps during this stage as well. Organizational files and records were employed as secondary data sources. The list of these described data sources includes:

- Minutes and notes of workshops, including reflections
- Reflective memos written by myself during the research
- Organizational metrics and company documents relevant to the innovations and the research
- Review of the findings by a sales leader who was not part of the executive team and who represented the field sales team
- Feedback from the team on what they had learned from the study
- Emails exchanged with the executive team

Extracts of all of this data may be found in Appendix H.

7.2 Turning Research into Action: Methodology

After the scholarly literature review, the first phase of inquiry, comprising the survey that was sent to my company's sales force was followed by a second inquiry: bringing the results back to the organization, eliciting feedback, implementing some

of the suggested actions and then understanding the outcomes within my organization. This approach is described in Table 32 which was suggested by Ramsey (2014) and illustrates the moments of my action research.

Table 32 Moments of Research

Moment	Put into Practice	Actions Taken
Mapping the Terrain	I conducted a scholarly literature review and then I gathered data through a quantitative survey to inform what further action will be required within my organization. I used real business results as well as results from my survey.	Literature review Quantitative survey Gathering of business results over three years
Testing Plausibility	During this stage I needed to network with various colleagues, leaders and stakeholders to first of all come together to review the results and ultimately gain endorsement for the approach.	I summarized results of the quantitative survey, mapped to the business results that are more familiar to my organization's leaders I sent the results and requested meetings: both one on one and group meetings Gained consensus on putting into place a few key changes with the goal of improving our innovation outcomes
Evaluating Action	We implemented some key changes and evaluated the results.	I put into place the key changes in the form of a playbook. Put measurement plan in place to be able to evaluate the results of this action

Mapping the terrain was discussed in the preceding chapters. I will now discuss the moments of testing plausibility and evaluation action.

7.3 Testing Plausibility: Translation of Key Understandings into Business Actions

As indicated above, I led two workshops with my organization's leadership team, beginning with the information that had been shared in the pre-read (Appendix H). My goal was to ensure comprehension of the four key understandings that I outlined

in Chapter 6, align on the suggested actions and then agree to be able to use these suggested actions to put to work within my organization and observe the results. My initial key understandings were the result of my reflection on my survey results and my literature review and were evaluated in subsequent stages of my action research. This process is described in the following sections.

7.3.1 Key Understanding 1: Individual perceptions as well as organizational practical measures must be taken into consideration

In order to create successful innovation outcomes, I recommend that my organization monitor individual perception of success knowing that these individual perceptions may be associated with long-term organization success of the innovation. Business results pertains to both individual perceived business results and organizational business results. The finding from my research is that a sales associate within my organization who understands the big picture of business results or the individual picture for what business results a sales associate might expect from the innovation could be associated with successful innovation outcomes.

Keeping regular checks on individual perceptions may allow my organization to pivot strategy if we find that we are not on track with individual perceptions. In the case of my study, individual perceptions were measured after the fact and too late to make any impact or changes to the innovation that was being deployed

7.3.1.1 Suggested Action

My recommendation and suggested action was to implement regular pulse surveys of our sales force to understand their feedback during the innovation rollout as opposed to at the end of the rollout. This suggested action was accepted enthusiastically by stakeholders from all areas of the organization. The Market Insights team would lead on the creation of the survey and the results would be reviewed in monthly leadership meetings.

7.3.2 Key Understanding 2: Overcoming Barriers by enlisting the Support of a Dedicated Business Transformation Team

In the literature, the theme emerged which asserted that overcoming barriers through collaboration and cooperation was part of the path toward successful innovation outcomes (Pourkiani et al. (2013), D'este et al. (2012), Pullig et al. (2002). My research identified an association between business transformation teams and successful innovation outcomes.

7.3.2.1 Suggested Action

The suggested action was to identify business transformation teams to help support successful innovation outcomes. I needed to obtain leadership endorsement to create a format for transformation teams and explain benefits and overcome objections. After reflection and discussion within my organization, I had some practical tasks to implement a barrier-removing transformation team. This would require the creation of a job description for members of this team and recruit based on this description. This description may vary from project to project. Team member profiles should include information technology experts along with subject matter or department experts. Working together will ensure appropriate representation and balance between IT and the functional practice.

All organization stakeholders believed that having a support team, or a panel of subject matter experts, could help the innovation process. The conversations regarding the feasibility of this team, however, grew quite passionate. The IT stakeholders believed that they were not given enough resources to implement innovation which automatically set them up for innovation outcome failure. The various business function stakeholders, such as Finance and Sales, felt that while their infusion of expertise could help innovation deployment, it might also leave them short-handed during the day-to-day functioning of the business. They were reluctant to commit their subject matter expert resources to the project in the fear that, while it would advance the successful innovation outcomes, it would also render them less successful within their portfolios. Executive leaders felt that the subject matter experts should be pulled from their day-to-day teams and that the

teams should backfill the temporary voids without committing additional resources. Most of my organization's leaders also felt that bringing in external BT resources would not be as effective as utilizing internal associates.

7.3.3 Key Understanding 3: Factors which may contribute to positive innovation outcomes

Enabling factors were explored in my research. The top four factors that were identified by the sales force were explored in this section. These factors are: i) incentives ii) training iii) support and iv) trust.

7.3.3.1 Suggested Action

The recommendation and suggested action is to communicate financial benefits upfront to all stakeholders. This recommendation is corroborated in my literature review which discussed increased financial benefit to workers could create a positive halo around innovation (Ahearne et al, 2005; Uhlaner et al. 2013).

Agents who are responsible for implementing innovation should be aware of the detailed benefits, for themselves as individuals, for their teams and departments and for the organization.

- Identify and employ thought leaders who will reinforce these benefits to their peers and colleagues
- Ensure that the benefits that are being communicated are accurate. Do not misrepresent or overstate them or else all credibility will be lost

This suggested action was not readily accepted by organization stakeholders and I have doubts whether it will be implemented fully due to its relative controversy. This anticipated outcome may be attributed to several reasons.

- Some leaders were reluctant to quantify the benefits of the innovation in case they were held accountable for this number. If, for whatever reason, the innovation fell short of its perceived financial benefit, then the innovation outcome may be viewed as a failure
- If stating the benefits to the users actually results in a less favourable business outcome, the users would not only doubt the credibility of that innovation but all subsequent innovations

- There was also caution exercised by organization leaders in communicating the projected financial outcomes or benefits in case there was resultant jealousy from some organizational association. For example, if the financial benefits of one innovation outcome impacted one group of associates and this was communicated, resentment might build from other departments who did not realize similar befits.

For these reasons, the leadership team felt that the projected financial outcomes should potentially be softly communicated or not communicated at all. This practical reaction is actually corroborated by the literature which asserts that communicating benefits that do not materialize can lead to less successful innovation outcomes. While intuitively it makes sense to explain the benefits of the innovation, if the leadership team is not certain that these benefits may develop, it makes more sense to softly communicate them.

Another recommendation was to institute training programs to assist managers in supporting front-line associates. Developing coaching programs to help managers encourage their teams would also help with this suggested action. The training and development teams fully supported this approach and were charged with developing programs in conjunction with functional experts. The stakeholders also discussed the potential for the identification of different innovation programs. A coach who was effective in one area might be less so in another area.

7.3.4 Key Understanding 4: Show no bias toward demographic factors

With respect to demographic factors, older workers should be included alongside younger workers, more tenured workers should be included alongside less tenured workers and males and females should work alongside each other when working with innovation without fear of negative association on innovation outcomes

7.3.4.1 Recommendation and Suggested Action

This will require the insertion of all ages and all tenures of associates into both the business transformation teams and the functional deployment team. We would need to identify role models for all associates to endorse the innovation. Targeting

female associates with communication that emphasizes how the innovation will differentiate my organization from its competitors. Targeting effective communication to female associates in particular, outline the customer benefits associated with the innovation.

The concept behind this recommendation was readily understood by stakeholders. The feasibility of identifying associates with suitable age and tenure profiles while still maintaining subject matter expertise was discussed. The feeling was that the business could implement this recommendation "the best that they could", but it would be difficult to control and measure the contributions of this approach. Some interesting discussions of demographic cohorts were had when comparing the addition of younger workers to the teams and the different work approach that they might bring. The human resources department felt that there would be friction between the Millennial and other cohorts as they worked together. The stakeholders that tactics would need to be developed for cross-cohort collaboration.

7.4 Development of Checklist

Within the leadership meeting, I then facilitated a discussion among my leadership group with the goal of agreeing on an interim checklist that could be utilized by our organization throughout the innovation process. My goal was to have this endorsed checklist that I could bring to project leaders within my company to utilize and observe the effects. To achieve this, I stated this goal within the meeting so that all of the leaders understood our objective. I asked them to react to the results of the study and provide their own narrative based on their own practical experience and knowledge. We examined the recommendations which were outlined in the prior section, item by item and I began to write on a whiteboard some of the ideas that surfaced. The whiteboard discussion is summarized below:

- ROI goals need to be set beyond just one year increments. Sightlines should be on short, medium and longer term goals.
- Should utilize feedback mechanisms to better understand sentiments from those who are implementing innovatons. Should be done pre, during and post implementation

- Create process around dedicated business transformation teams, including functional inclusions, budgets, composition and how we manage performance reviews for seconded associates
- Clearly explain a WIIFM for associates who will be implementing innovation. Consider PowerPoint or other presentation/communication document. Possibly one-page POS sheet.
- Evaluate tenure of associates and create Chatter groups with a mix of both longer tenured associates and shorter tenured associates.
- Create incentive, trainng plans for innovation
- Identify customer focus of innovation

This discussion resulted in a checklist that the leadership team endorsed as a protocol that could be potentially utilized throughout innovation projects within our organization. The checklist is found in greater detail in Appendix I. The checklist was intended to synthesize the translation of key understandings and leadership recommendations and distil through an easier-to-understand checklist that could be followed end-to-end by practitioners within my organization. My leadership team was very receptive to the checklist as they felt that it was something that could be repeatable within the organization and very easy to benchmark and monitor from a management point of view.

7.5 Putting the Checklist into Action

I then took this checklist to the lead of a new innovation which was being launched. The innovation was a menu services portal that was being launched to our customers through our sales force. It is described below in Table 33 and uses the same format that was used to introduce all six of the innovations in Chapter 4. Thus, this is now the seventh innovation.

Table 33 Menu Services Innovation

Innovation	Description	Theoretical Context
Menu Services Portal (Menu)	Represents a new process of creating menus for restaurant customers. It involves reaching out directly to corporate customers through	Schumpeter (2008) characterizes this innovation as a new

Innovation	Description	Theoretical Context
	direct email to inquire about their menus. It then collects customer information and using a new technology tool, creates a menu for them, and then stores it in a digital locker for the customer. This process represents a change in process for the sales associate who would previously contact the customer and work on the menu with them. Now it will be done through a dedicated customer service representative.	method of production. Pullig et al. (2002) describe this innovation as a process that is novel to an organization.

I discussed with the lead of this menu services project that we could look at the checklist and then discuss how to best implement the guidance within the checklist for this particular menu innovation. We could then understand if this would assist in enabling successful innovation outcomes. Implementation of the checklist would also include the identification and deployment of a business transformation team which was identified in the literature review as an enabler of innovation outcomes and was borne out by my survey. For the lead of this project it was exciting because she would receive more support and attention with her critical project. She was also nervous because she felt that she would be under more leadership scrutiny than she might normally have expected.

7.5.1 Methodology

The goal of this stage of research was to understand if the checklist had any bearing on successful innovation outcomes. It was a multi-stage process:

- I first took the checklist that had been endorsed by my organization's leadership team and described above and detailed in Appendix I and discussed it with the lead of the innovation that was being deployed. I reviewed the goals of my research, which was in addition to the goals that she had with her innovation.
- Together, we discussed the results and reflected as a group on the opportunity that could be leveraged to better understand associations with successful innovation outcomes. There was a new innovation that was about

to deploy which was a customer-facing, sales associate deployed innovation: a menu tool.

- I consulted the checklist and created tools and a framework to support each of the items that were on the checklist. These tools are found in Appendix I.
- We deployed the innovation with the support of the tools and within the stated framework.
- I measured and observed the results of the innovation using a quantitative survey along with the empirical business results which the innovation generated.
- I returned to the leadership team of my organization to discuss the viability of the checklist, make refinements based on these new learnings and identify another case where it could be implemented.
- This then began an ongoing cycle of action learning which persists today.

I will now describe the stages and steps within this phase of my action research. The detail for each of the below sections may be found in Appendix H.

7.5.1.1 Pilot Implementation

I undertook a pilot in the summer of 2016 and the implementation was occurring between August 2016 and December 2016. The pilot pertained to a new menu application and process that was to be implemented with our customers. This project had its own ROI measures and was being launched as a pilot within 12 companies, impacting possibly 3,000 customers and being deployed through 34 sales associates.

7.5.1.2 Establish Organizational Goals

Working with the lead of the innovation, I collected the ROI goals that had been put in place for this innovation. These goals comprised sales growth, margin growth and customer adoption. We also established what desirable behavioural goals would be for the sales associates. The innovation was a menu application to be used by customers and the innovation needed to be communicated to the customer by a sales associate in order to be launched. These goals were measured by the number

of customer introductions that a sales associate was able to successfully convert to subscription.

7.5.1.3 Database Protocol

To address the observations made during the quantitative phase of my research, I put into place a data hygiene protocol with our Customer Relationship Management section to cleanse our sales associate database. The goal of this was to ensure that any communication was being distributed to the correct audience. This would save time and provide a direct channel for feedback. It would also ensure that my efforts did not lose any credibility due to participants feeling that we were not coming from a place of competence.

7.5.1.4 Individual Outcomes

I created a slide which explained the benefits that could be realized by an individual who was involved with this innovation. The important part of this slide was to help the sales associate, who was charged with deploying this innovation, understand the personal benefits that he/she could derive.

7.5.1.5 Business Outcomes

I created a slide which explained the big picture benefits of the innovation to the organization. This was an understanding gained during our prior research referencing that understanding how the innovation might benefit not only the individual, but the greater entity may impact the success of an innovation outcome.

7.5.1.6 Customer Outcomes

I created a slide which explained the benefits for the customer. This was an important learning from the prior research which was that knowing that an innovation could be beneficial for a customer may lead to successful innovation outcomes.

7.5.1.7 Facilitating Cross-Communication through Chatter Group (Tenure, Age, Gender)

Incorporated within the CRM innovation which was studied within my research is also an established community which enables groups of individuals to come together

to discuss projects or other aspects of the business. On this community (named Chatter) I created a group dedicated to this new Menu innovation. I enrolled all of the participating sales associates to this group and moderated it myself. I facilitated discussion on the innovation which enabled associates of various tenures and ages and genders to come together to discuss and learn from one another. As facilitator, I was able to monitor how many individuals commented or replied within the group, as well as frequency over time. We were also able to interact with one another in a less quantitative fashion, to share ideas and provide feedback. Some screenshots of the Chatter group are found in Appendix I.6.

7.5.1.8 Incentive Program

I put in place an incentive program for the sales associates which rewarded behaviours that would generate the desired innovation outcome including communicating the innovation to customers, encouraging customers to use the innovation and using the innovation themselves. The incentive program was announced before we began training and then was reinforced throughout the project via email and during sales meetings. Incentives were put in place for both sales associates and customers. Although incentives for customers were not specifically mentioned during the quantitative phase of my research, the need for customer-centricity was. I determined to weave the customer message as closely as possible throughout the innovation deployment.

7.5.1.9 Training Program

Working with our Learning and Development team, I created an online learning module to help train our sales associates. This learning module was accompanied by an in-person training session for each sales associate. The quality of the in-person training was variable based on the sales associate who was delivering it making it difficult to quantity. The transformation teams were also on hand to deploy training to our sales associates and then after initial training were able to support the sales associates.

7.6 Data Collection

I utilized the business metrics of ROI outcomes as well as survey metrics from a quantitative survey that I delivered to the sales associates. The survey itself was modelled after the survey that I used during the quantitative phase of my research. I asked the same four questions of the 34 sales associates that participated. I had 100% response rate from the sales associates who were part of the Menu innovation pilot. I also took the business metrics for the full year fiscal period.

7.7 Implementation Outcomes

The business metrics returned after one year of the Menu innovation showed that the innovation was successful in terms of its ROI objective. The sales growth of this innovation relative to other innovations was quite significant. In Table 34, I compare the outcome of this innovation to the most successful from the original set of innovations in terms of sales growth.

Table 34 Business Results – Menu Innovation

Innovation	Customer Adoption Rate	Sales Growth	Successful according to ROI Objective – Year 1
Menu	35%	11.5%	Yes
NCOB	75%	8%	No

From an individual perception perspective, I took the results from this post-survey, organizational action and compared it to the innovations that were researched in the initial quantitative phase of my study. This is displayed in Table 35.

Table 35 Individual Results All Seven Innovations

Innovation	Perceived Successful Outcome for Customers	Perceived Impact on Own Sales Results	Encourage Customers to Use	Use Self	Overall
Menu*	3.34	3.56	3.71	4.21	3.70
NCOB*	2.91	3.34	2.64	3.76	3.16
Customer First*	3.01	3.05	2.97	3.03	3.01
ISR*	2.92	3.04	2.94	2.99	2.97
Compensation	3.26	2.26	2.06	3.07	2.66

CRM*	1.66	2.26	2.93	3.00	2.46
Loyalty	1.86	2.13	2.69	3.05	2.43

* Transformation team assigned

7.8 Evaluation

I then undertook an action research approach to evaluating and understanding the results of this process. This involved reflection and returning to the organization.

7.8.1 Reflection on the Role of the Checklist

I have had the benefit of year-long data from this action research to help me understand whether implementing this checklist was helpful to a successful innovation outcome. The overall average for individual perceptions for the Menu innovation was higher than any of the other six, previously researched innovations.

7.8.2 Organizational Evaluation

I then took the results of this action research and the outcome of the innovation and discussed further within our leadership team. These practical discussions within my organization helped us to better understand what factors could improve or limit successful innovation outcomes. I socialized the findings within my company by discussing the highlights with the leadership team. These discussions led us to determine that we needed to develop a playbook, usingn the checklist as a guide. The playbook would contain templates and other more detailed step-by-step instructions for those leading innovations so that they could have all of the resources at their disposal. I then developed this playbook which I presented with the goal of helping my organization's teams utilize some of the findings to support changes in innovation processes and procedures for us going forward. This final playbook is found in Appendix J.

The guidance contained within the playbook incorporates the individual and organizational factors which have been studied as well as the feedback provided by the organization upon review of the key understandings and our evaluation after implementing the checklist with the newest menu innovation. As the last step with this research, I presented the playbook to a cross-functional panel of leadership stakeholders within the studied organization. The intention with this final step was to understand if what they had told me during the initial stages of this research

aligned with the findings from the quantitative research. The goal was to gather their feedback to see if this made sense and to also see what findings could be put into action for organizational gains.

While the innovation outcomes playbook was developed based on results from the front-line sales associate survey, it is important to note that ultimately customers are impacted by this playbook as well. Customers are critically important to an organization's success and should be considered when evaluating innovation and its outcomes. Most of the factors that have been studied in this study pertain to the individual who works within the organization or the organizational factors that exist. Still, most of these factors do relate to a customer, either directly or indirectly. For example, customers are directly impacted by how likely a sales associate would be to engage with them using the new innovation. They may be impacted by delayed or lagging innovation that impacts their transactions with an organization. The front-line sales associate is primarily responsible for ensuring that the customer is satisfied and that an excellent service experience is delivered. This requires them to ensure that any innovation that is being deployed from within their organization only impacts customers in an enriching way.

7.9 Shifting the Organization as a Result of Action Research

This phase of my research resulted in an intervention for the business. Reviewing this research and focusing on RQ2 enabled our organization to pause its current behaviours and really contemplate shifts in approaches and tactical pivots. Both studies within my thesis research (1- quantitative survey and 2- organizational action) have helped create a shift in the thinking within my organization's leadership. Together we worked to solve a known problem and using the key results of this research will enable us to move closer to the goal of resolution.

7.10 Chapter Summary

The knowledge generated from this research provides a richer understanding of innovation outcomes within my organization and the individual factors which may help to improve the outcome of successful innovations. My organization's

leadership may be able to employ the information generated from my thesis to address the concerns and fears of our front-line sales associates which should be considered throughout every step of the innovation process. Understanding how various factors may impact individuals within my organization may support decisions regarding resource allocation; timeline and adoption curve estimation and will assist in generating overall endorsement and buy-in from all constituents. Further, the information collected from my research may be further utilized by my organization and its associates to help gain insight into the innovation process. It can be used to support future planning processes for us as we consider their innovation lifecycle. This research also provides information that may be employed by my organization to encourage cross-departmental collaboration, to work together toward defined organizational KPIs.

Chapter 8 Final Reflections and Conclusions

8.0 Introduction

During the literature review, I discussed that generating successful innovation outcomes might be considered a vital component to business success in today's competitive world. This could indicate that organizations which embrace innovation may be more likely to succeed within an increasingly competitive business environment while those who remain indifferent to innovation may experience an erosion in market share while watching their innovation-inclined competitors surpass them. It is my hope that the results of my research have helped to extend the current understanding of both perceived and organizationally measured successful innovation outcomes within my organization. In particular, I hope that my research has provided some insights to my organization to help improve the success of innovation outcomes, particularly for those innovations which are implemented by our front-line customer-facing sales associates. This chapter will discuss my journey as an action researcher including my reflections on being an insider researcher and the impact that my research has had on both myself and my organization. It will discuss the limitations of my research as well as suggest some considerations for future research.

8.1 Answering My Research Questions

I began my research journey with research questions that I strived to better understand through my action research. I will close the loop on these questions in this section by discussing what I learned, question by question, in relation to specific literature.

Research Question 1: What factors may be associated with successful innovation outcomes within my organization?

I began my research with a number of thoughts as to what factors may be related to successful innovation outcomes. These thoughts were formulated from my own practical experience as well as my scholarly literature review. After studying these factors through action research including a quantitative survey as well as practical

work within my organization, I have a list of factors to consider which may be associated with successful innovation outcomes:

- Acknowledgement and support for demographic factors such as gender, tenure and age. Some associations were found in my research and these are always good reminders for my organization given our desire for inclusiveness. Acknowledging that sales associates in different age cohorts, of different genders and with different tenure may require different approaches or different kinds of support may contribute to more successful innovation outcomes.
- Providing incentives, training and management support may help contribute to more successful innovation outcomes.
- Using cross-functional business transformation teams may help contribute to more successful innovation outcomes.
- Finally, having a perception of success may be associated with successful innovation outcomes.

Research Question 2: What actions could my organization put into place to help improve the success of innovation outcomes

Through my scholarly literature review, quantitative survey and working within my own organization to implement and gain a better understanding of associations that may exist between certain factors and implementation outcomes, I have created a checklist of factors which may aid my organization in realizing more successful innovation outcomes:

- Using transformation teams to assist with peer leadership and subject matter expertise
- Set business goals with not just a one year horizon, but a two and three year horizon as well
- Explain to stakeholders what they and their customers stand to gain from the innovation

- Put the customer at the centre of the innovation and ensure that all organizational stakeholders understand how this will improve the life of the customer
- Create support mechanism for those that are charged with implementing the innovation, whether through an online community, regular meetings or newsletters to help share best practices or shared struggles
- Implement incentives for those who are charged with deploying the innovation
- Create training plan for those who will implement the innovation

8.2 My Journey as a Reflexive Action Researcher

The span of my research and its related efforts has now stretched many years, from conception and ideation; to proposal writing and acceptance; from data collection to analysis; and from interpretation of data and discussion with key stakeholders. This represents a significant journey for me as I travelled this road with many implications for me, my organization and scholarly knowledge. Kosnick (1999) refers to the "transformative power of action research" in her journey as an educational action researcher, and while we are in different industries I do agree with her assertion that authentic assessment of one's environment can take a long time and that our evaluation will evolve over this arc.

8.2.1 The Reality of My Practice

Throughout this journey my organization has continued to implement innovation, although our conversations regarding potential success factors have become more transparent. Since the time this thesis began to current state, we have seen disruptors enter our channel such as Amazon. These disruptors have proven very adept at innovating successfully. My imperative at the beginning of this thesis has now become our day-to-day reality. While this research may seem abstract to the reader, the book that I mentioned in Chapter 1 that I first read in 1994 and that was an inspiration for this research has now come to life: my organization must make continual decisions to implement innovation or not, and if we decide to proceed we know that we must realize successful outcomes or face dire competitive

consequences. Our struggle for market share is growing more intensive and we must realize more successful innovation outcomes than our competitors in order to continue to lead our industry.

8.2.2 The Evolution of my Reflexive Practice

During the course of this thesis, both my professional and personal development have continued. I have been married, have relocated internationally and taken on new assignments for my organization. Just this past year, we were caught in the natural disaster of Hurricane Harvey in the Southern USA and lost most of our material possessions, swimming through the water with essentially my academic laptop on my back to save my thesis. It is interesting to look back and see all of these professional and personal events, juxtaposed with organizational and industry events that I described in the preceding section, occurring in front of the backdrop that my research has continuously occupied. While I was engaging in a multi-stage process, seeking to collaboratively improve my organization through the implementation of informed change, I was seeking solutions and improvements of other areas of my life and requiring the participation of many other constituents. The richness of my personal and professional experiences have added more dimensions to my ability to critically reflect and reframe as they have given me new knowledge through which to make informed observations and fresh perspectives to view problems.

8.2.3 The Insider Phenomenon

As an action researcher, I have created tension within certain areas of my organization through the research stage. At the beginning of this research effort, the organizational leaders were very supportive and enthusiastic about my research and what benefits it might bring for our organization. At the tail end of this research, however, when I scheduled meetings to review findings and make recommendations, fatigue had definitely set in for many of these leaders. Some of the significant recommendations, such as business transformation teams, raised conflicts between departments which evidenced the need for more support, both financial and otherwise. Some of these conflicts have not yet abated. Other

recommendations, which seemed quite banal such as the need for more accurate databases, also raised passions within the leadership team and shone a light on the fact that more understanding and enhanced communication was required between departments. Still other recommendations, which I felt would prove more controversial, such as age and tenure targeting, were well accepted.

This research was intrusive within my organization and my own professional life and the impacts cannot be denied. As a researcher, the results stand on their own. As a practitioner, the results raised awareness that there is no such thing as a simple change. Any change requires more communication than one may initially foresee, and the impacts of even small recommendations require close collaboration and transparency between functional areas. As an action researcher, I experienced some bruising conversations with leaders within my organization who questioned whether these recommended changes should occur at all. There was also some skepticism at the end as to whether these results were readily applicable to the practice in general and our organization in particular. This skepticism was borne of several factors including the length of time that it took for this research to be completed. In practical terms, recommendations should be made quickly and implemented even more quickly so that the business can move forward not affording sufficient time for critical reflection. Two positive outcomes for me, as both a researcher and a practical professional was the development of patience (not a virtue that I previously grasped) and the ability to communicate more effectively to non-endorsers. These newly developed skills will stay with me as I carry forth as a research practitioner.

I did not understand the high level of interest that my research would hold for my company's leadership team. My organization values entrepreneurism and practical background. Long tenure at my company holds weight relative to education. There is a high degree of cynicism toward consultants and other "academic types", so I while I knew that there would be support for my research, I did not understand that there would be such thirst for this knowledge. Further compounding this is that, during the course of my thesis, I experienced many changes in leadership. I also physically

shifted divisions and this created opportunities to socialize my research to a larger audience which brought even richer feedback and thought processes to my research.

8.2.3.1 Shaping Organizational Outcomes

Through my action research, including my quantitative survey, my many discussions with organizational stakeholders and my own reflective practice, I can see how my research has been effective in improving my organization's routines and culture. The mere act of conducting this research has created a new type of dialogue within my organization's leadership team. There has never before been an academic research project conducted within my organization so this act alone has necessitated the growth of an awareness of academic knowledge and perhaps a modest appreciation for how this knowledge might benefit a practical organization. My organization has been able to learn through this research which was discussed by Kock et al. (2017). The term "business transformation team" is now commonplace within my organization (Jacoby, 2018). Some leaders within my organization still inquire about my research even though the timeline for this project has surpassed what we had originally discussed. I believe that the next research project that is brought to my organization's leadership will be met with a greater appreciation for what it might be able to accomplish or, even minimally, how my organization might be able to assist another student. This really brings to light how my research has created its own innovation income on three levels: personal for me as an action researcher (Herr and Anderson, 2005); scholarly for the knowledge that I was able to create for my organization (Camison and Villar-Lopez, 2014); and organizational with the shifts that I described (Damanpour and Evans, 1984).

8.3 Limitations of my Research

As with any research study (Creswell, 2009), my thesis has its own research limitations, a number of which I will note within this section. Within this discussion I will also address the potential effects of these limitations on my results as well as actions that I took to mitigate the effects of the limitations. I will also discuss what further research might bring us closer to an understanding of innovation success and

what organizational actions or methodological changes might be considered to overcome these limitations.

8.3.1 Dual Role

The dual role that I played within my organization must be considered as my action research was done solely within my own organization. As a positive aspect of this, working within my own organization afforded me a great deal of proprietary information to which an outside researcher may not have enjoyed access. As an action researcher, I was already privy to the inner workings, culture and the power distribution which exists. This allowed me to move without as much friction that may have been experienced by an external researcher.

This same insider bias which afforded me greater access was also accompanied by preconceptions and opinions as to why existing innovation outcomes had been successful or unsuccessful. Herr and Anderson (2005) refer to this as the politics and bias of action research (pp. 60) as my insider status provided me with the ability to influence participants' willingness to participate in my research. The familiarity to my research participants is unavoidable. This pertains to both the sales associates who responded to my quantitative survey as well as the leaders and executives who helped to endorse, guide and provide feedback on my research (Kock et al, 2017). The large scale quantitative survey was sent out across the country and although I did as much communication as I could to provide a framework for the participants I was unable to cover this topic as thoroughly as I would have liked, due in part to resource constraints. I was also conscious of fatiguing our sales force with my research questions, when I knew that both I and my organization would benefit from them focusing on their sales efforts instead. This created a bit more tentativeness on my part as I did not want to upset leaders within the company by distracting the sales force. It did not reduce my scope but I definitely was aware of walking a fine line to ensure that I received the data I required while keeping my organization's leadership team happy. My role is marketing and I was surveying sales associates which also lent familiarity as our disciplines are functionally tied together within our

organization which was another fine line for me to walk to ensure objectivity was maintained.

8.3.2 Two Attempts

Because I have now had two attempts at completing this thesis, I had to consider my previous research and thesis. The primary body of survey research has been revised and built on. I used this opportunity to extend the scope of my research as the research timeline allowed me to capture three years' worth of business data. This did allow for a more interesting analysis.

8.3.3 Inexperience of Researcher

If I knew then what I now know, I would have realized that I knew even less than I thought when I embarked on this journey. And, having arrived near the end of this particular journey, I somehow think that my mindshare penetration is even lower than when I began. That is, the body of knowledge in the universe has expanded, and while my own body of knowledge has expanded, this expansion has not been proportional to the greater universe.

I also thought that I had a unique vantage point and perhaps an insider's understanding of innovation outcomes and the impact on my organization. This was an arrogant assessment. I underestimated the tension that this research would cause in my organization. I underestimated how profoundly and how quickly the phenomenon of innovation would impact my organization. I did establish a large scope of study for my research and while this limitation may have impacted my methodological design and the results of my research, it did enhance my learning as an action researcher and helped me grow as both a scholar and a practitioner.

8.4 Suggestions for Future Research

Despite the limitations that were previously discussed, my research effort provided valuable information. It also left many avenues available for future research to be explored by myself or other researchers.

Another aspect of innovation outcomes that may benefit from further study within my organization is the longitudinal aspect of innovation and looking at multiple time periods past the initial innovation implementation. In my study I had the benefit of three years' worth of data, and it would be interesting to measure this over the coming years, which is something that I intend to do. This might help to create an even greater understanding of whether the length of the implementation cycle may have any bearing on a successful or unsuccessful outcome. I am also curious as to whether geography may play any influencing role in innovation outcomes. My thesis focused on our Canadian operations and I have access to our global divisions, so doing a future country comparison to look at associations with innovation outcomes may also be of value for future research.

It may bear further study to understand whether the research approach that I employed in my thesis may be applicable to other domains (i.e. healthcare), similar economies and organizations in similar industries as well as organizations in other industries. There is a contextual aspect to this research where variances may be found across cultures. This thesis may provide a foundation for subsequent research with the original participants as well as additional sectors and participants. There will also be benefit to do a future qualitative study to really identify central themes in innovation outcomes. It would also be interesting to see if the results of this survey hold true in other industries or in other economies.

8.5 Summary

As has been discussed throughout my thesis, the requirement for my organization to innovate is likely to continue to accelerate and the need to be able to realize successful outcomes with innovations will continue to increase in urgency and is vital for my organization's sustained prosperity. Therefore, it is valuable for my organization to understand what factors might be considered in order to improve the success of outcomes from these innovations. The end result of my research indicates that achieving successful innovation outcomes is actually the result of many different factors including training, incentives, support and understanding the individual and organizational benefits of the innovation. These factors may exist on

parallel levels with organizational factors and individual perceptions combining to create an optimal environment for successful innovation outcomes. As a leader within business and as a scholar-practitioner, it is my role to ensure that my organization identifies and understands these factors and then has the right processes and routines to implement checklists to allow for successful innovation outcomes and sustained prosperity both for my organization and the individual who work within it.

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Appendix A: Data Codebook

Company	Code
BDLS	1
Calgary	2
Central Ontario	3
Halifax	4
Kelowna	5
Moncton	6
Quebec	7
St. John's	8
Toronto	9
Vancouver	10
Victoria	11
Edmonton	12
Regina	13
Winnipeg	14
Size of Organization	
Less than 500 employees	1
500 to 1000 employees	2
1000 to 1500 employees	3
1500 - 2000 employees	4
2000+ employees	5
Leadership Structure	
President	1
President and EVP	2
GM Only	3
Business Transformation Team	4
Front Line Sales Role	Code
Yes	1
No	0

Tenure	Code
16+ years	4
11-15 years	3
6-10 years	2
0-5 years	1
Province	Code
AB	1
BC	2
MB	3
NB	4
NF	5
NS	6
ON	7
PEI	8
QC	9
Refused	10
SK	11
Gender	Code
Male	1
Female	2
Age	Code
20-25 years	1
26-35 years	2
36-45 years	3
46-55 years	4
56+ years	5
Prefer not to say	6
Refused	7
Aware of Initiative #1	Code
Don't Know	3

No	2
Refused	4
Yes	1
How would you rate Initiative #1 in terms of innovative effectiveness?	Code
Don't Know	7
Excellent	1
Fair	4
Good	3
Poor	5
Refused	6
Very Good	2
What degree of impact has Initiative #1 had on your business performance?	Code
Substantial Impact	6
Moderate Impact	5
Slight Impact	4
Negative Impact	3
No Impact	2
Refused	1
Don't Know	7
What degree of impact has Initiative #2 had on your business performance?	Code
Don't Know	7
Excellent	1
Fair	4
Good	3
Poor	5
Refused	6
Very Good	2

What degree of impact has Initiative #2 had on your business performance?	Code
Substantial Impact	6
Moderate Impact	5
Slight Impact	4
Negative Impact	3
No Impact	2
Refused	1
Don't Know	7
How likely are you to encourage your customers to sign up for Initiative #2?	Code
Don't Know	7
Extremely Likely	1
Not at all likely	5
Not Very Likely	4
Refused	6
Somewhat Likely	3
Very Likely	2
How likely are you to interact with Initiative #2?	Code
Excellent Value	1
Very Good Value	2
Good Value	3
Marginal Value	4
Poor Value	5
Refused	6
Don't Know	7
What value do you personally receive from Initiative #2?	Code
Excellent Value	1
Very Good Value	2
Good Value	3

Marginal Value	4
Poor Value	5
Refused	6
Don't Know	7
How often are you updating Initiative #3?	Code
Daily	1
Weekly	2
Monthly	3
Never	4
Don't Know	5
What platform are you using to update Initiative #3?	Code
iPad/Tablet	1
Laptop	2
Smart Phone	3
Other	4
Refused	5
Don't Know	6
Is your company impacted by Initiative #4?	Code
Don't Know	3
No	2
Refused	4
Yes	1
How would you rate Initiative #4 in terms of innovative effectiveness?	Code
Don't Know	7
Excellent	1
Fair	4
Good	3
Poor	5
Refused	6
Very Good	2

How would you describe the impact of Initiative #4 on your day to day activities?	Code
Extremely Positive	1
Very Positive	2
Somewhat Positive	3
Not Very Positive	4
Not at All Positive	5
Refused	6
Don't Know	7
How would you rate Initiative #5 in terms of innovative effectiveness?	Code
Don't Know	7
Excellent	1
Fair	4
Good	3
Poor	5
Refused	6
Very Good	2
What degree of impact has Initiative #5 had on your business performance?	Code
Substantial Impact	6
Moderate Impact	5
Slight Impact	4
Negative Impact	3
No Impact	2
Refused	1
Don't Know	7
How would you rate the Intervention and Opportunity Follow Up Alert system for Initiative #5?	Code
Don't Know	7
Excellent	1

Fair	4
Good	3
Poor	5
Refused	6
Very Good	2
Change in Business Volume Over Next Year from Sales Growth Programs	Code
Don't Know	7
Excellent	1
Fair	4
Good	3
Poor	5
Refused	6
Very Good	2
As a result of Initiative #6 how do you expect the volume of your engagements and new case sales to change over the next year?	Code
Increase Substantially	1
Increase Somewhat	2
Stay About the Same	3
Decrease Somewhat	4
Decrease Substantially	5
Refused	6
Don't Know	7

Appendix B: Sales Extract Sample

Local Sales Scorecard - Canada- FY14

vs LY

Area*	WK1	WK2	WK3	WK4	WK5	WK6	YTD
BC1	15.99%	21.65%	24.16%	19.13%	32.52%	23.20%	20.62%
BC2	7.03%	-0.40%	8.36%	4.82%	16.33%	8.50%	4.91%
BC3	5.52%	10.60%	5.46%	6.26%	18.08%	11.36%	7.12%
AB1	10.80%	13.00%	12.27%	5.00%	13.62%	12.55%	12.01%
AB2	0.85%	-0.49%	-4.22%	0.61%	10.69%	-0.08%	-1.34%
SK1	-0.53%	1.42%	-4.28%	-1.14%	4.67%	-1.57%	-1.14%
MB1	10.93%	12.81%	11.11%	7.52%	22.67%	8.65%	11.61%
West Division	**5.60%**	**6.85%**	**6.40%**	**5.33%**	**16.27%**	**8.33%**	**6.66%**
ON1	16.89%	3.10%	-3.14%	2.74%	16.10%	3.95%	5.64%
ON2	22.63%	31.59%	2.60%	0.90%	17.99%	10.86%	7.34%
ON3	-14.75%	-14.94%	-17.10%	-25.04%	-7.40%	-21.65%	-15.59%
ON4	2.88%	6.11%	5.57%	5.61%	8.65%	4.80%	4.82%
QC1	-4.10%	-3.78%	-10.88%	-6.42%	-12.59%	-9.36%	-6.23%
QC2	-3.52%	5.97%	-1.13%	-3.86%	-11.52%	-3.94%	0.40%
QC3	-3.70%	6.30%	3.24%	5.07%	13.08%	10.52%	1.83%
AT1	21.42%	19.69%	4.63%	12.46%	7.37%	10.34%	15.08%
AT2	1.57%	16.83%	16.81%	13.09%	18.57%	8.79%	11.37%
AT3	-3.93%	5.79%	10.41%	5.49%	4.20%	-3.73%	4.18%
East Division	7.31%	8.43%	0.70%	1.76%	9.01%	3.24%	3.79%
Canada	7.05%	7.69%	3.34%	3.45%	12.34%	5.59%	5.12%

*Area Field labels have been masked to shield confidential organizational data.

Appendix C: Survey

Q01A. Does your current role involve front-line sales? **REQUIRED**

○	Yes	1
○	No	2

IF Q01A IS NO, TERMINATE RESPONDENT AND SHOW THE FOLLOWING MESSAGE:

This brief survey is intended for those involved in front-line sales only. Thank you for your time!

Q1. How long have you worked for this company:

○	0-5 years	1
○	6-10 years	2
○	11-15 years	3
○	16 years +	4

Q2. Please state your province: **DROP DOWN PICK LIST**

○	BC	1
○	AB	2
○	SK	3
○	MB	4
○	ON	5
○	QC	6
○	NS	7
○	NB	8
○	NF	9
○	PEI	10

Q3. Please select your gender:

○	Male	1
○	Female	2

Q4. Please select your age range:

20-25 years	1
26-35 years	2
36-45 years	3
46-55 years	4
56+ years	5
Prefer not to say	9

Q5. Are you aware of NCOB?

Yes	1
No	2
Don't Know	9

IF Q5=NO (2), DON'T KNOW (9) SKIP TO NEXT SECTION

Q6. How would you rate NCOB overall in terms of successful outcomes as it relates to positive impact to your customers?

Excellent	Very Good	Good	Fair	Poor	Don't Know
5	4	3	2	1	9

Q7. What degree of positive impact has NCOB had on your business performance?

Substantial Positive Impact	Moderate Positive Impact	No Impact	Moderate Negative Impact	Substantial Negative Impact	Don't Know
5	4	3	2	1	9

Q8. How likely are you to encourage your customers to continue to use NCOB?

Extremely Likely	Very Likely	Neither likely nor unlikely	Not Very Likely	Not at All Likely	Don't Know

5	4	3	2	1	9

Q9. How likely are you to continue to use NCOB yourself?

Extremely Likely	Very Likely	Neither likely nor unlikely	Not Very Likely	Not at All Likely	Don't Know
5	4	3	2	1	9

Q10. Are you aware of Loyalty?

Yes	1
No	2
Don't Know	9

IF Q11=NO (2), DON'T KNOW (9) SKIP TO NEXT SECTION

Q11. How would you rate Loyalty Program overall in terms of successful outcome as it relates to positive impact to your customers?

Excellent	Very Good	Good	Fair	Poor	Don't Know
5	4	3	2	1	9

Q12. What degree of positive impact has Loyalty Program had on your business performance?

Substantial Positive Impact	Moderate Positive Impact	No Impact	Moderate Negative Impact	Substantial Negative Impact	Don't Know
5	4	3	2	1	9

Q13. How likely are you to encourage your customers to continue to use Loyalty Program?

Extremely Likely	Very Likely	Neither likely nor unlikely	Not Very Likely	Not at All Likely	Don't Know
5	4	3	2	1	9

Q14. How likely are you to continue to use Loyalty Program yourself?

Extremely Likely	Very Likely	Neither likely nor unlikely	Not Very Likely	Not at All Likely	Don't Know
5	4	3	2	1	9

Q15. Are you aware of CRM?

Yes	1
No	2
Don't Know	9

IF Q15=NO (2), DON'T KNOW (9) SKIP TO NEXT SECTION

Q16. How would you rate CRM overall in terms of successful outcome as it relates to positive impact to your customers?

Excellent	Very Good	Good	Fair	Poor	Don't Know
5	4	3	2	1	9

Q17. What degree of positive impact has CRM had on your business performance?

Substantial Positive Impact	Moderate Positive Impact	No Impact	Moderate Negative Impact	Substantial Negative Impact	Don't Know
5	4	3	2	1	9

Q18. How likely are you to encourage your customers to continue to use CRM?

Extremely Likely	Very Likely	Neither likely nor unlikely	Not Very Likely	Not at All Likely	Don't Know
5	4	3	2	1	9

Q19. How likely are you to continue to use CRM yourself?

Extremely Likely	Very Likely	Neither likely nor unlikely	Not Very Likely	Not at All Likely	Don't Know
5	4	3	2	1	9

Q20. Are you aware of CRM?

Yes	1
No	2
Don't Know	9

IF Q20=NO (2), DON'T KNOW (9) SKIP TO NEXT SECTION

Q21. How would you rate ISR overall in terms of successful outcome as it relates to positive impact to your customers?

Excellent	Very Good	Good	Fair	Poor	Don't Know
5	4	3	2	1	9

Q22. What degree of positive impact has ISR had on your business performance?

Substantial Positive Impact	Moderate Positive Impact	No Impact	Moderate Negative Impact	Substantial Negative Impact	Don't Know
5	4	3	2	1	9

Q23. How likely are you to encourage your customers to continue to use ISR?

Extremely Likely	Very Likely	Neither likely nor unlikely	Not Very Likely	Not at All Likely	Don't Know
5	4	3	2	1	9

Q24. How likely are you to continue to use ISR yourself?

Extremely Likely	Very Likely	Neither likely nor unlikely	Not Very Likely	Not at All Likely	Don't Know
5	4	3	2	1	9

Q25. Are you aware of CRM?

Yes	1
No	2
Don't Know	9

IF Q26=NO (2), DON'T KNOW (9) SKIP TO NEXT SECTION

Q26. How would you rate Customer First overall in terms of successful outcome as it relates to positive impact to your customers?

Excellent	Very Good	Good	Fair	Poor	Don't Know
5	4	3	2	1	9

Q27. What degree of positive impact has Customers First had on your business performance?

Substantial Positive Impact	Moderate Positive Impact	No Impact	Moderate Negative Impact	Substantial Negative Impact	Don't Know
5	4	3	2	1	9

Q28. How likely are you to encourage your customers to continue to use Customers First?

Extremely Likely	Very Likely	Neither likely nor unlikely	Not Very Likely	Not at All Likely	Don't Know
5	4	3	2	1	9

Q29. How likely are you to continue to use Customers First yourself?

Extremely Likely	Very Likely	Neither likely nor unlikely	Not Very Likely	Not at All Likely	Don't Know
5	4	3	2	1	9

Q30. Are you aware of Compensation?

Yes	1
No	2
Don't Know	9

IF Q31=NO (2), DON'T KNOW (9) SKIP TO NEXT SECTION

Q31. How would you rate Compensation in terms of successful outcome as it relates to positive impact to your customers?

Excellent	Very Good	Good	Fair	Poor	Don't Know
5	4	3	2	1	9

Q32. What degree of positive impact has Compensation had on your business performance?

Substantial Positive Impact	Moderate Positive Impact	No Impact	Moderate Negative Impact	Substantial Negative Impact	Don't Know
5	4	3	2	1	9

Q33. How likely are you to encourage your customers to continue to use Compensation?

Extremely Likely	Very Likely	Neither likely nor unlikely	Not Very Likely	Not at All Likely	Don't Know
5	4	3	2	1	9

Q34. How likely are you to continue to use Compensation yourself?

Extremely Likely	Very Likely	Neither likely nor unlikely	Not Very Likely	Not at All Likely	Don't Know
5	4	3	2	1	9

Q35: Below is a list of nine factors that may enable associate success when implementing innovation. We're interested in how **impactful** each factor is to you relative to your success when implementing something new.

In the table below, we'd like for you to distribute a **total of 100 points** between the nine aspects listed, based on their importance to your organization. At the bottom of the table, we provide a running total of your entries, to help you make sure they sum to 100.

ROTATE	Enter number of points, based on impact
a. **Incentives:** If incentives are offered in exchange for the adoption of the Innovation (could be incentives for Sales, or for Customer, etc.).	
b. **Training for you:** Sufficient and appropriate training is provided for all users.	
c. **Support for you:** Sufficient and timely solutions provided when problems and/or questions are encountered.	
d. **Encouragement/Leadership:** Usage of the innovation is encouraged throughout the organization (i.e., by your Company leadership, and elsewhere within your Company).	
e. **Customer Focus:** Understanding how these Innovations will assist you in assisting your customers.	
f. **Competitive Differentiation:** Understanding how these Innovations will differentiate us from our competitors.	
g. **Ability to share Best Practices:** Having a culture and structure which fosters cross-functional sharing of information (i.e., between departments, between locations, etc.).	

h. **Trust:** Having the ability to rely upon other members of your organization.	
i. **Entrepreneurial Values:** Having an environment where risk taking and pro-activeness is encouraged.	
Sum of your entries (must equal 100):	[Insert AutoSum to provide running total]

Appendix D: Community of Practice Reflections

The community of practice meets monthly. I have summarized some of the key themes within this appendix.

Theme: When aiming for successful innovation outcomes, what employee behaviours should an organization reward?

- Learning orientation, risk taking, initiative/self drivers, willingness to try
- Providing feedback and receiving feedback, change adaptive orientation
- Flexibility, openness, communication

Theme: What kinds of information can innovative technologies/systems provide that would be valuable in terms of helping increase an organization's productivity?

- Implementing a system that will track and benchmark health data for associates, and changes to these indicators to prove that a program is successful. For example, how well you are reacting to stress, and then ultimately they are using the information to seek additional resources, including funding and selling the program so that more people will participate in the program
- Sales growth, penetration technologies
- We need to look at innovation and efficiencies in order to drive out costs, such as people costs, training costs, costs of transacting, costs of analysing our business.

Theme: Organizational culture and shared values are necessary to drive successful innovation outcomes.

- Culture that feels safe to try new things, to bring new ideas, to be supportive that sort of thing
- Budget
- Training within a culture. Flexibility to be innovative. Communication.
- Clarity, top down and bottom up
- Trust

Theme: Issues that limit or enhance the effectiveness of successful innovation outcomes

- Culture
- Leadership and management
- Incentives
- Understanding customers
- Resources (financial and technology)
- Communication
- Security, trust

Appendix E: Ethics

E.1 Participant Consent Form

Committee on Research Ethics

PARTICIPANT CONSENT FORM

(this will be shown as an introduction screen prior to clicking through to the online survey which is anonymous)

Title of Research Project: Investigating the Acceptance, Adoption and Effective Utilization of Innovation, Technology and Automation Systems Within the Canadian Foodservice Distribution Segment		
Researcher(s):	Hassan QudratUllah Maureen Quirk	Please check box
1. I confirm that I have read and have understood the information screen for the above study. I have had the opportunity to consider the information, ask questions and have had these answered satisfactorily.		
2. I understand that my participation is voluntary and that I am free to withdraw at any time without giving any reason, without my rights being affected. In addition, should I not wish to answer any particular question or questions, I am free to decline.		
~~3.~~ I understand that, under the Freedom of Information Act in Canada I can at any time ask for access to the information I provide and I can also request the destruction of that information if I wish. Note: the survey will be anonymous and the data will not be accessible.		

4. I agree to take part in the above study.	

Researcher Date Signature

Principal Investigator:

Hassan QudratUllah

Student Researcher:

Maureen Quirk

21 Four Seasons Place, Suite 400

416-712-1362

quirk.maureen@corp.company.ca

E.2 DBA Ethics Approval Letter of Ethics Process Established by Researcher

Original E-mail

From : Evangelia Katsikea [evangelia.katsikea@my.ohecampus.com]

Date : 03/12/2014 06:52 PM

To : maureen.quirk@my.ohecampus.com

CC : Pascale Hardy [pascale.hardy@my.ohecampus.com], Paul.ellwood@liverpool.ac.uk, Hassan QudratUllah[hassan.qudratullah@my.ohecampus.com]

Subject : Re: Ethics application

Dear Maureen,

The DBA ethics committee have reviewed your revised documents and I am happy to inform you that you are authorised to proceed with your research.

Best Wishes,

Eva Katsikea, (on behalf of the ethics committee)

E.3 Ethics Information Sheet

Research Participant Information and Consent Form

You are being asked to participate in a voluntary and non-profit study as part of a doctoral thesis project. Please take your time to review this consent **page** and discuss any questions you may have with the researcher, Maureen Quirk. It is entirely your decision whether to participate in this voluntary study – it is completely optional.

Title of Study: Acceptance, Adoption and Utilization of Innovation, Technology and Automation Systems

Principal Investigator: Maureen Quirk, Doctoral Candidate, 416-712-1362, maureenquirk@hotmail.com

Academic Supervisor: Hassan Qudrat-Ullah, PhD, York University, University of Liverpool, Carnegie-Mellon

Purpose of Study

The goal of this study is to conduct action research to better understand why within organizations, some innovations are adopted and effectively utilized while others are not and in so doing inform practitioners so that they can better understand variables which can be influenced for competitive advantage, human resource efficiencies and ultimate market share acquisition.

You are being invited to participate in this study as you have unique perspectives regarding innovation implementation including sales force automation systems. Your insights will lead to a better understanding of the factors which will assist organizations in the effective deployment of innovation to generate the desired return..

Study procedures

You will participate in a web-based survey that will take approximately 30 minutes to complete. You may stop this process at any time. Your response is anonymous and your answers will in no way be tied to identifying information.

Study Results

Results will be made available to all participants in a general academic summary. Participants will not be identifiable within these results.

Confidentiality

Information gathered in this research study may one day be published or presented in public forums, however your name, your organization's name and other identifying information will not be used or revealed. Your participation information will be treated as confidential in accordance with the Personal Information Protection and Electronic Documents Act (PIPEDA) of Canada. All research information including survey results will be kept in a locked, secure area and destroyed once the data is captured and analysed. Any information containing your name, or contact information will be destroyed.

Voluntary Participation/Withdrawal from the Study

Your decision to take part in this study is voluntary. You may refuse to participate or you may withdraw from the study at any time.

Questions

You are free to ask any questions that you may have about this study and your rights as a research participant. If any questions come up during or after the study contact any of the research staff noted above. If you are unhappy, or if there is a problem, please feel free to let us know by contacting the Principal Investigator and we will try

to help. If you remain unhappy or have a complaint which you feel you cannot come to us with then you should contact the Research Governance Officer at the University of Liverpool: ethics@liv.ac.uk. When contacting the Research Governance Officer, please provide details of the name or description of the study (so that it can be identified), the researcher(s) involved, and the details of the complaint you wish to make.

Please only **provide consent** if you have had a chance to ask questions and have received satisfactory answers to all of your questions.

Statement of Consent

I have read this consent form. I have had the opportunity to discuss this research study with Maureen Quirk. I have had my questions answered in a language I understand. The risks and benefits have been explained to me. I believe that I have not been unduly influenced by any study team member to participate in the research study by any statement or implied statements. Any relationship (such as employee, student or family member) I may have with the study team has not affected my decision to participate. I understand that I will be emailed a copy of this consent form after authorizing it. I freely agree to participate in this research study and understand that my participation in this study is voluntary and that I may choose to withdraw at any time.

I understand that information regarding my personal identity will be kept confidential.

Participant authorization_____ Date

_____

(day/month/year)

Appendix F: Action Learning Journal Reflections

I maintained this journal throughout my research journey. I wanted to present a synthesis of my writing and have summarized some key themes within this appendix.

Excerpts from Action Learning Journal

April 2014- Reflective practice has not been the norm in my business world and is not a standard practice of anyone that I know in my organization. This practice is proving to be a great collaborative tool for enhancing my understanding of my current research project and I feel good about being able to help others by shining a different type of light on their current individual issues and opportunities. Joan's observation: use Walker tool rather than Survey monkey. Also SAS has survey tools that may integrate directly into statistical software. To investigate. Overall, I need to ensure that I do not grow too tactical, too quickly. Need to reflect and think through the overall strategy.

Oct 2013 – Reflection requires time and time is not a plentiful resource in anyone's books. Possibly contemporaneous reflection may be a more practical application of this. Sometimes in the learning set there is counter-agenda feedback or even possibly self-serving feedback which I find derailing my solution path. That being said, there is something to be said for taking the journey and there are other learning's to be had, the likes of which I may not even have contemplated. This community permits inquiry. Learning today: don't rush process; don't make assumptions about what my company's stakeholders will believe or say; being too solution-oriented in our fast-paced business world makes it difficult to share ideas in a thoughtful manner. Slow down to hurry up.

Feb 2/15 – Bias: I am making assumptions that my organization will not devote resources and attention due to academic nature. Showing them the WIIFM may mitigate. Being aware of biases of others including my organization's stakeholders is the first step and then finding a way to help push through them. Most critical to this is my own bias as an insider. I also have assumptions about everyone else's agendas and priorities. I am coming at the issue/structure with my "end game" in mind, namely to create a process that will make our changes more successful.

December/15 – Discussing the implications for my current practice and the consequences for not taking action on our issues regarding implementation. I am not the only one that can take action, but I do have the ability to take action. The reality is that if I do not take action then it is conceivable that our sales will drop, our profitability will decline and we will continue to lose sales associates. These associates will then go to our competitors and take their business with them. This will also create negative morale and repercussions including stock price dips, lost business potential layoffs and lack of further investment in our own growth and development.

Goal Setting: I need to clarify my organization's goals. I have assumed that they want to improve in this area, but they actually may think that it is the innovation and not the process. To accept that it

might be the process is to also accept some accountability and responsibility. So possibly there might be a congruency lacking between my views and the leadership's views. Also need to define what success is. We may already think that we are successful.

Appendix G: Detailed Data Results

G.1 Tenure

G.1.2 Tenure Association with Innovation

The below table shows ANOVA for association with tenure on innovation factors (Table 33).

Table 36 ANOVA Table for Association of Tenure on Different Innovation Factors

Innovation	Characteristic	Tenure	n	Mean	SD	F	p
NCOB	Perceived Successful Outcome for customers	0 - 5 years	313	2.87	1.035	2.115	.097
		6 - 10 years	131	2.94	.967		
		11 - 15 years	126	3.08	1.191		
		16 or more years	89	2.74	.911		
	Perceived Impact on Own Sales Results	0 - 5 years	313	3.36	1.301	2.320	.074
		6 - 10 years	131	3.50	1.279		
		11 - 15 years	126	3.09	1.426		
		16 or more years	89	3.39	1.230		
	Encourage Customers to Use	0 - 5 years	313	2.53	.994	2.799	**.039**
		6 - 10 years	131	2.64	1.023		
		11 - 15 years	126	2.81	1.164		
		16 or more years	89	2.78	1.009		
	Use Self	0 - 5 years	313	3.73	1.237	0.562	.640
		6 - 10 years	131	3.86	1.162		
		11 - 15 years	126	3.68	1.244		
		16 or more years	89	3.80	1.208		
Loyalty	Perceived Successful Outcome for customers	0 - 5 years	313	1.80	.944	5.513	**.001**
		6 - 10 years	131	1.71	.873		
		11 - 15 years	126	2.17	1.253		
		16 or more years	89	1.83	.991		
	Perceived Impact on Own Sales Results	0 - 5 years	313	2.09	1.081	2.971	**.031**
		6 - 10 years	131	2.01	1.056		
		11 - 15 years	126	2.40	1.460		
		16 or more years	89	2.09	1.114		

Innovation	Characteristic	Tenure	n	Mean	SD	F	p
	Encourage Customers to Use	0 - 5 years	313	2.62	1.193	3.116	**.026**
		6 - 10 years	131	2.59	1.073		
		11 - 15 years	126	2.75	1.276		
		16 or more years	89	3.02	1.225		
	Use Self	0 - 5 years	313	3.07	1.359	0.206	.893
		6 - 10 years	131	2.98	1.460		
		11 - 15 years	126	3.03	1.350		
		16 or more years	89	3.11	1.533		
CRM	Perceived Successful Outcome for customers	0 - 5 years	313	1.49	.817	13.739	**<.001**
		6 - 10 years	131	1.59	.876		
		11 - 15 years	126	2.16	1.400		
		16 or more years	89	1.66	1.076		
	Perceived Impact on Own Sales Results	0 - 5 years	313	2.24	.708	3.730	**.011**
		6 - 10 years	131	2.17	.634		
		11 - 15 years	126	2.46	1.056		
		16 or more years	89	2.19	.737		
	Encourage Customers to Use	0 - 5 years	313	2.97	1.414	0.344	.793
		6 - 10 years	131	2.82	1.395		
		11 - 15 years	126	2.93	1.465		
		16 or more years	89	2.96	1.522		
	Use Self	0 - 5 years	313	2.97	1.393	0.311	.817
		6 - 10 years	131	2.97	1.370		
		11 - 15 years	126	3.04	1.483		
		16 or more years	89	3.12	1.429		
ISR	Perceived Successful Outcome for customers	0 - 5 years	313	2.97	1.402	2.81	.085
		6 - 10 years	131	2.66	1.244		
		11 - 15 years	126	3.08	1.383		
		16 or more years	89	2.90	1.431		
	Perceived Impact on Own Sales Results	0 - 5 years	313	3.00	1.374	0.179	.910
		6 - 10 years	131	3.07	1.426		
		11 - 15 years	126	3.08	1.434		
		16 or more years	89	3.10	1.374		
	Encourage Customers to Use	0 - 5 years	313	2.87	1.386	1.034	.377

Innovation	Characteristic	Tenure	n	Mean	SD	F	p
		6 - 10 years	131	3.11	1.366		
		11 - 15 years	126	2.87	1.470		
		16 or more years	89	3.00	1.406		
	Use Self	0 - 5 years	313	3.03	1.407	1.040	.374
		6 - 10 years	131	2.90	1.413		
		11 - 15 years	126	2.87	1.347		
		16 or more years	89	3.16	1.373		
Customers First		0 - 5 years	313	3.04	1.393	1.209	.306
	Perceived Successful Outcome for customers	6 - 10 years	131	2.82	1.424		
		11 - 15 years	126	3.06	1.413		
		16 or more years	89	3.15	1.394		
	Perceived Impact on Own Sales Results	0 - 5 years	313	3.07	1.422	.962	.410
		6 - 10 years	131	2.88	1.462		
		11 - 15 years	126	3.17	1.502		
		16 or more years	89	3.04	1.405		
	Encourage Customers to Use	0 - 5 years	313	2.86	1.392	1.468	.222
		6 - 10 years	131	3.10	1.364		
		11 - 15 years	126	3.10	1.332		
		16 or more years	89	2.99	1.496		
	Use Self	0 - 5 years	313	3.01	1.429	.301	.825
		6 - 10 years	131	2.97	1.336		
		11 - 15 years	126	3.13	1.480		
		16 or more years	89	3.02	1.323		
Compensation		0 - 5 years	313	3.11	1.028	4.634	**.003**
	Perceived Successful Outcome for customers	6 - 10 years	131	3.44	1.016		
		11 - 15 years	126	3.32	1.115		
		16 or more years	89	3.44	1.022		
	Perceived Impact on Own Sales Results	0 - 5 years	313	2.10	.826	10.205	<.**001**
		6 - 10 years	131	2.27	.775		
		11 - 15 years	126	2.60	1.139		
		16 or more years	89	2.35	.725		
	Encourage Customers to Use	0 - 5 years	313	2.07	.811	2.753	**.042**
		6 - 10 years	131	1.94	.830		

Innovation	Characteristic	Tenure	n	Mean	SD	F	p
		11 - 15 years	126	2.00	.820		
		16 or more years	89	2.25	.830		
	Use Self	0 - 5 years	313	3.00	1.409	1.234	.296
		6 - 10 years	131	3.24	1.461		
		11 - 15 years	126	2.97	1.402		
		16 or more years	89	3.18	1.378		

Bold shows association

G.2 Gender

G.2.1 Gender Association on Innovation Outcomes

The following table shows association of gender with perceived innovation outcomes (Table 34).

Table 37 Exploring Association of Gender on Perceived Innovation Outcomes

Innovation		Gender	N	Mean	SD	t	p
NCOB	Perceived Successful Outcome for customers	Male	423	2.83	1.025	2.934	**.017**
		Female	236	3.03	1.059		
	Perceived Impact on Own Sales Results	Male	423	3.45	1.287	2.85	**.005**
		Female	236	3.15	1.349		
	Encourage Customers to Use	Male	423	2.67	.992	.997	.319
		Female	236	2.58	1.121		
	Use Self	Male	423	3.85	1.167	2.591	**.010**
		Female	236	3.59	1.293		
Loyalty	Perceived Successful Outcome for customers	Male	423	1.78	.922	2.629	**.009**
		Female	236	2.00	1.150		
	Perceived Impact on Own Sales Results	Male	423	2.04	1.081	2.736	**.006**
		Female	236	2.30	1.294		
	Encourage Customers to Use	Male	423	2.72	1.184	.656	.512
		Female	236	2.65	1.220		
	Use Self	Male	423	3.12	1.408	1.675	.095
		Female	236	2.93	1.380		
CRM	Perceived Successful Outcome for customers	Male	423	1.51	.865	5.172	<**.001**
		Female	236	1.93	1.225		
	Perceived Impact on Own Sales Results	Male	423	2.18	.633	3.431	**.001**
		Female	236	2.40	.982		

Innovation		Gender	N	Mean	SD	t	p
	Encourage customers to use	Male	423	2.84	1.426	2.208	**.028**
		Female	236	3.10	1.433		
	Use Self	Male	423	3.02	1.401	.428	.669
		Female	236	2.97	1.426		
ISR	Perceived Successful Outcome for customers	Male	423	2.86	1.375	1.417	.157
		Female	236	3.02	1.376		
	Perceived Impact on Own Sales Results	Male	423	3.11	1.372	1.716	.087
		Female	236	2.92	1.425		
	Encourage customers to use	Male	423	2.94	1.406	.093	.926
		Female	236	2.93	1.396		
	Use Self	Male	423	3.03	1.393	.866	.387
		Female	236	2.93	1.393		
Customer First	Perceived Successful Outcome for customers	Male	423	2.98	1.423	.855	.393
		Female	236	3.08	1.369		
	Perceived Impact on Own Sales Results	Male	423	3.05	1.443	.046	.963
		Female	236	3.05	1.448		
	Encourage customers to use	Male	423	2.97	1.424	.068	.946
		Female	236	2.97	1.333		
	Use Self	Male	423	2.98	1.416	1.210	.227
		Female	236	3.11	1.384		
Compensation	Perceived Successful Outcome for customers	Male	423	3.32	1.042	2.006	**.045**
		Female	236	3.15	1.060		
	Perceived Impact on Own Sales Results	Male	423	2.24	.794	.850	.395
		Female	236	2.31	1.044		
	Encourage customers to use	Male	423	2.06	.830	.222	.824
		Female	236	2.05	.811		
	Use Self	Male	423	3.13	1.410	1.654	.099
		Female	236	2.94	1.418		

Bold shows association

G.3 Age

G.3.1 Association of Age on Innovation Outcomes and Research Questions

Table 35 reports summary of ANOVA results for exploring the significance of association of age of sales associates on characteristics of different innovations.

Table 38 ANOVA Table for Association of Age on Different Innovation Factors

Innovation	Characteristic	Age	N	Mean	SD	F	P
NCOB	Perceived Successful Outcome for customers	20 - 25 years	19	2.89	1.150	.868	.483
		26 - 35 years	185	2.84	1.033		
		36 - 45 years	229	2.95	1.044		
		46 - 55 years	152	2.90	1.028		
		56 or more	31	2.61	.803		
	Perceived impact on own sales results	20 - 25 years	19	3.47	1.349	1.063	.374
		26 - 35 years	185	3.52	1.282		
		36 - 45 years	229	3.26	1.291		
		46 - 55 years	152	3.34	1.377		
		56 or more	31	3.35	1.305		
	Encourage Customers to use	20 - 25 years	19	2.84	.958	1.234	.295
		26 - 35 years	185	2.54	1.021		
		36 - 45 years	229	2.70	1.067		
		46 - 55 years	152	2.53	1.023		
		56 or more	31	2.71	.902		
	Use Self	20 - 25 years	19	3.42	1.305	2.120	.077
		26 - 35 years	185	3.94	1.133		
		36 - 45 years	229	3.66	1.241		
		46 - 55 years	152	3.79	1.227		
		56 or more	31	4.03	1.110		
Loyalty	Perceived Successful Outcome for customers	20 - 25 years	19	2.26	1.284	1.508	.198
		26 - 35 years	185	1.71	.833		
		36 - 45 years	229	1.81	1.025		
		46 - 55 years	152	1.83	.975		
		56 or more	31	1.81	.946		
	Perceived impact on own sales results	20 - 25 years	19	2.32	1.293	.626	.644
		26 - 35 years	185	2.06	1.043		
		36 - 45 years	229	2.07	1.154		
		46 - 55 years	152	2.05	1.112		
		56 or more	31	2.32	1.222		
	Encourage Customers to use	20 - 25 years	19	3.26	1.098	2.064	.084
		26 - 35 years	185	2.69	1.165		
		36 - 45 years	229	2.56	1.200		
		46 - 55 years	152	2.74	1.206		
		56 or more	31	2.90	1.165		
	Use Self	20 - 25 years	19	2.53	1.172	.747	.560
		26 - 35 years	185	3.08	1.293		
		36 - 45 years	229	3.04	1.434		
		46 - 55 years	152	3.06	1.475		
		56 or more	31	3.16	1.393		
CRM		20 - 25 years	19	1.79	1.134	2.703	**.030**

Innovation	Characteristic	Age	N	Mean	SD	F	P
	Perceived Successful Outcome for customers	26 - 35 years	185	1.42	.719		
		36 - 45 years	229	1.67	1.040		
		46 - 55 years	152	1.62	1.016		
		56 or more	31	1.87	1.176		
	Perceived impact on own sales results	20 - 25 years	19	2.74	1.046	4.758	**.001**
		26 - 35 years	185	2.19	.582		
		36 - 45 years	229	2.30	.899		
		46 - 55 years	152	2.09	.527		
		56 or more	31	2.13	.428		
	Encourage Customers to use	20 - 25 years	19	3.05	1.433	.248	.911
		26 - 35 years	185	2.92	1.402		
		36 - 45 years	229	2.94	1.422		
		46 - 55 years	152	2.82	1.505		
		56 or more	31	2.81	1.376		
	Use Self	20 - 25 years	19	2.63	1.212	1.283	.275
		26 - 35 years	185	2.91	1.476		
		36 - 45 years	229	3.17	1.340		
		46 - 55 years	152	2.98	1.416		
		56 or more	31	3.00	1.438		
ISR	Perceived Successful Outcome for customers	20 - 25 years	19	2.84	1.608	.143	.966
		26 - 35 years	185	2.88	1.399		
		36 - 45 years	229	2.91	1.393		
		46 - 55 years	152	2.98	1.310		
		56 or more	31	2.87	1.477		
	Perceived impact on own sales results	20 - 25 years	19	3.05	1.508	.234	.919
		26 - 35 years	185	2.99	1.437		
		36 - 45 years	229	3.02	1.389		
		46 - 55 years	152	3.11	1.398		
		56 or more	31	3.16	1.214		
	Encourage Customers to use	20 - 25 years	19	3.05	1.079	.342	.850
		26 - 35 years	185	2.85	1.363		
		36 - 45 years	229	2.98	1.423		
		46 - 55 years	152	2.97	1.414		
		56 or more	31	2.84	1.508		
	Use Self	20 - 25 years	19	3.16	1.425	.790	.532
		26 - 35 years	185	3.09	1.336		
		36 - 45 years	229	2.86	1.444		
		46 - 55 years	152	3.01	1.388		
		56 or more	31	3.00	1.265		
Customers First	Perceived Successful Outcome for customers	20 - 25 years	19	2.63	1.461	.547	.701
		26 - 35 years	185	3.01	1.363		
		36 - 45 years	229	3.04	1.440		

Innovation	Characteristic	Age	N	Mean	SD	F	P
		46 - 55 years	152	3.05	1.397		
		56 or more	31	3.23	1.431		
	Perceived impact on own sales results	20 - 25 years	19	3.05	1.268	.1365	.245
		26 - 35 years	185	2.89	1.343		
		36 - 45 years	229	3.03	1.519		
		46 - 55 years	152	3.13	1.434		
		56 or more	31	3.48	1.480		
	Encourage Customers to use	20 - 25 years	19	2.32	1.250	2.711	**.029**
		26 - 35 years	185	3.09	1.362		
		36 - 45 years	229	2.83	1.350		
		46 - 55 years	152	3.15	1.468		
		56 or more	31	2.81	1.515		
	Use Self	20 - 25 years	19	2.74	1.327	.449	.773
		26 - 35 years	185	2.95	1.457		
		36 - 45 years	229	3.09	1.390		
		46 - 55 years	152	3.05	1.349		
		56 or more	31	3.03	1.472		
Compensation	Perceived Successful Outcome for customers	20 - 25 years	19	3.00	1.054	3.251	**.012**
		26 - 35 years	185	3.09	1.034		
		36 - 45 years	229	3.32	1.047		
		46 - 55 years	152	3.45	1.015		
		56 or more	31	3.16	.898		
	Perceived impact on own sales results	20 - 25 years	19	2.53	1.124	4.043	**.003**
		26 - 35 years	185	2.04	.817		
		36 - 45 years	229	2.33	.933		
		46 - 55 years	152	2.22	.702		
		56 or more	31	2.39	.667		
	Encourage Customers to use	20 - 25 years	19	2.16	.765	.607	.657
		26 - 35 years	185	2.03	.843		
		36 - 45 years	229	2.06	.828		
		46 - 55 years	152	2.04	.805		
		56 or more	31	2.26	.855		
	Use Self	20 - 25 years	19	3.32	1.293	.479	.751
		26 - 35 years	185	3.02	1.437		
		36 - 45 years	229	3.12	1.377		
		46 - 55 years	152	2.99	1.430		
		56 or more	31	3.23	1.586		

Bold shows association

G.4 Sales Associate Perceptions

The below table presents a summary of t test results for exploring the perception of sales associates on successful outcomes of innovation programs across all

characteristics (Table 36). In this exploration, the alternate hypothesis H1 is set as H1: $\mu > 3$ indicting a test for –(i) Successful innovation outcomes, (ii) Positive impact on performance, (iii) likely to encourage customers to use innovation and (iv) likely to use the innovation for one self by sales associates.

Table 39 Descriptive Statistics for Response to Survey Items and Test for Significance

Innovation	Characteristic	Mean	Median	SD	t	p
NCOB	Perceived Successful Outcome for customers	2.90	3.00	1.041	-2.358	>.05
	Degree of Positive Impact	3.34	4.00	1.317	6.687	**<.001**
	Perceived Impact on Own Sales Results	2.64	3.00	1.040	-8.912	>.05
	Use Self	3.76	4.00	1.219	15.951	**<.001**
Loyalty	Perceived Successful Outcome for customers	1.86	2.00	1.014	-28.927	>.05
	Degree of Positive Impact	2.14	2.00	1.168	-19.018	>.05
	Perceived Impact on Own Sales Results	2.69	3.00	1.197	-6.576	>.05
	Use Self	3.05	3.00	1.400	.918	**<.001**
CRM	Perceived Successful Outcome for customers	1.66	1.00	1.028	-33.448	>.05
	Degree of Positive Impact	2.26	2.00	.782	-24.302	>.05
	Perceived Impact on Own Sales Results	2.93	3.00	1.433	-1.196	>.05
	Use Self	3.01	3.00	1.409	.111	.912
ISR	Perceived Successful Outcome for customers	2.92	3.00	1.376	-1.500	>.05
	Degree of Positive Impact	3.04	3.00	1.393	.811	.418
	Perceived Impact on Own Sales Results	2.93	3.00	1.401	-1.195	>.05
	Use Self	2.99	3.00	1.393	-.168	>.05
Customer First	Perceived Successful Outcome for customers	3.01	3.00	1.404	.250	.401
	Degree of Positive Impact	3.05	3.00	1.444	.890	.374
	Perceived Impact on Own Sales Results	2.97	3.00	1.391	-.560	.576
	Use Self	3.03	3.00	1.405	.471	.314
Compensation	Perceived Successful Outcome for customers	3.26	3.00	1.051	6.304	**<.001**
	Degree of Positive Impact	2.27	2.00	.891	-21.157	>.05

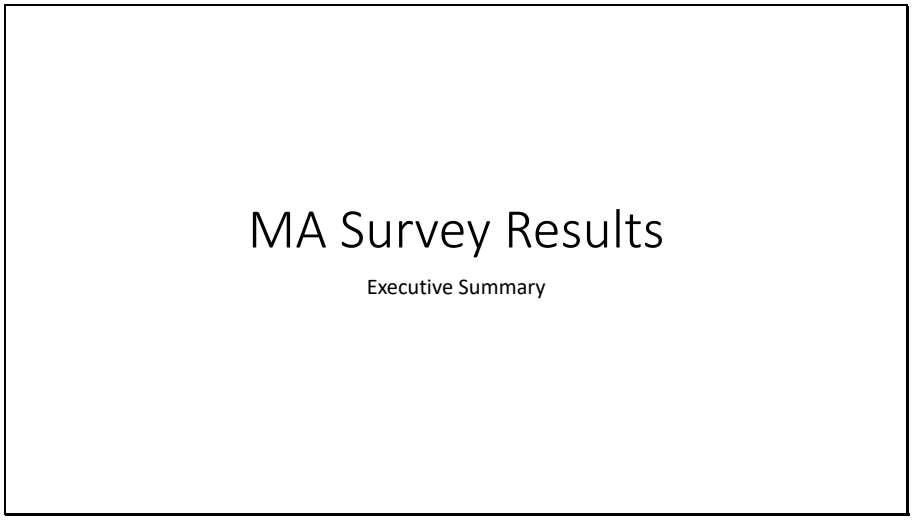
Innovation	Characteristic	Mean	Median	SD	t	p
	Perceived Impact on Own Sales Results	2.06	2.00	.822	-29.466	>.05
	Use Self	3.07	3.00	1.415	1.211	.226

Bold shows association

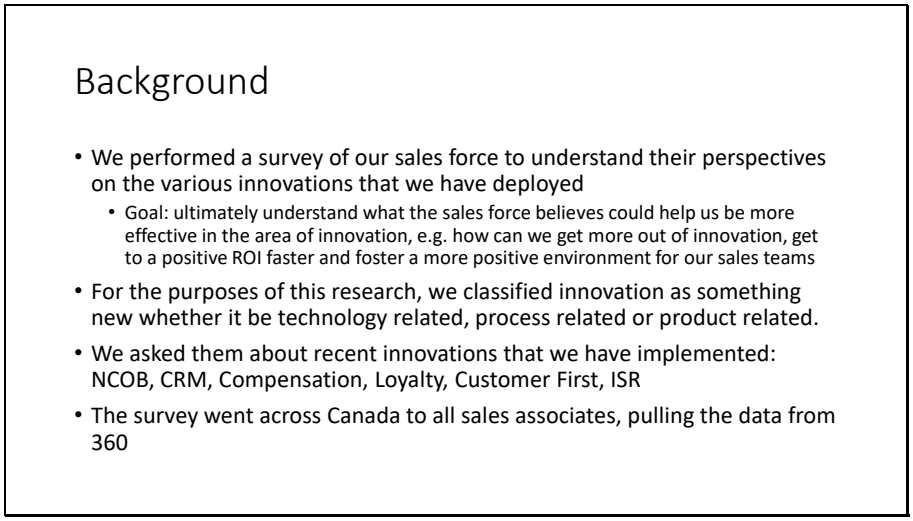
Appendix H: Extracts of Data Sources

H.1 Executive Summary of Key Understandings for Action Research

Slide 1



Slide 2



Slide 3

Results – Thank You for Your Support!

- We had a great response rate with 709 sales associates responding from the 890 surveys that we went.
  - 50 of the responses were ineligible which is a data hygiene issue to be discussed
- You already have a copy of the questionnaire that we created, so this deck will present the key findings from the research as a pre-read to our ELT meeting on June 20

Slide 4

Key Findings

- How comfortable a marketing associate feels about the innovation and his/her perspective on the innovation matters. In order to create the successful outcomes that we are targeting, we need to nurture a positive relationship with the MA and the innovation
- BT teams matter. The study showed that having these teams in place when we are deploying and entrenching the innovation can make a big difference in the business outcome
- Properly understanding the financial benefits (WIIFM) may make a difference
- Check our preconceptions at the door:
  - Age of associate may not be as influential as we think
  - Tenure of associate may not be as influential as we think
- Incentives should be included during the implementation process
- Understanding the customer centricity of the innovation may help our MAs buy in to the process and platforms

Slide 5

Next Steps

- During our meeting we will discuss these understandings to see what might be suitable for implementation to help us with our next wave of innovations
- The goal of this meeting will be to create a checklist and action plan of what we can do
- We will then pilot what we determine could be feasible and see if they are game changers
- If you are unable to attend our meeting, please let me know and we will set up some time to review 1:1

Slide 6

Thank You!

Your support has made the difference

H.2 Sample Minutes of Meetings: BT Teams

I explored this finding within the leadership team to discover why our organization does not use BT teams consistently. Some of the feedback:

- Retards the progress of any given functional area to pull subject matter experts out of their day to day functions, even on a part-time basis in order to assist with innovation for another department
- Costly to implement and run a BT team
- Can slow down the innovation process as the BT team requires installation, ongoing communication, possible refinements, and more collaboration. Collaboration takes time.
- Having a dedicated Business Transformation department and team is costly, and the teams sit idle at times. This does create accelerated innovation over time, however, as the team learns from each implementation and is able to apply these learnings on subsequent innovation endeavours

Appendix I Action Taken Within Organization Materials

I.1 Checklist for Action Taken Within Organizationyh

Manager Step	Practical application within Organization
Set business metric ROI goals 1, 2, 3 year	Need to record using scorecard which outlines targets, and then outcomes for Year 1, Year 2 and Year 3 post innovation implementation. Business metrics should include sales growth and ROI. Sources: Finance department
Create pulse survey to solicit feedback from key stakeholders on innovation	Use standard surveymonkey survey which asks five questions: 1) are you aware of the innovation? 2) How would you rate the innovation in terms of successful outcomes for your customers? 3) what degree of positive impact has "innovation" had on your business performance" 4) how likely are you to encourage your customers to continue to use "innovation"? 5) How likely are you to continue to use "innovation" yourself?
Identify and assemble business transformation team	Use standard job description and competency profile
Have a launch presentation for the associates who will be implementing	Presentation should be deployable in person or electronically and should cover the who, what, why, how aspects of the innovation as well as the customer benefit and the sales associate benefit and the benefit to our organization overall.
Evaluate tenure of associates and create Chatter groups with a mix of both longer tenured associates and shorter tenured associates	Use salesforce platform to create group and appointment two moderators (one shorter tenure, one longer).

Create incentive plan for innovation	Incentive plan to be created through sales team and validated through payroll and finance.
Create training plan for innovation	Working with learning and development team to use e-learning platform for learning modules.
Create customer-centric model for innovation	Create one page handout for customers to explain benefit of innovation and how it will help them be more successful.

I.2 CRM Database Protocol

- Garbage In, Garbage Out
-

- Bad inputs make bad outputs
- We have misleading data, which means that it is literally garbage

What will we do?

Audit Assessment

- Codes, attributes, fields
- Missing data: first name, spouse name, title, address, email address
- Mismatched: Gender, title, email value, City, Company
- Enhancements: Gender, Birthdate

Data Cleansing

- Each Sales Associate owns his/her records in the database
- Each VP Sales owns his/her records in the database
- Errors in the database must be identified and cleansed each Friday during weekly huddles
- All records to be validated by President
- Data Admin assigned to the overall database

I.3 Individual Outcome Presentation

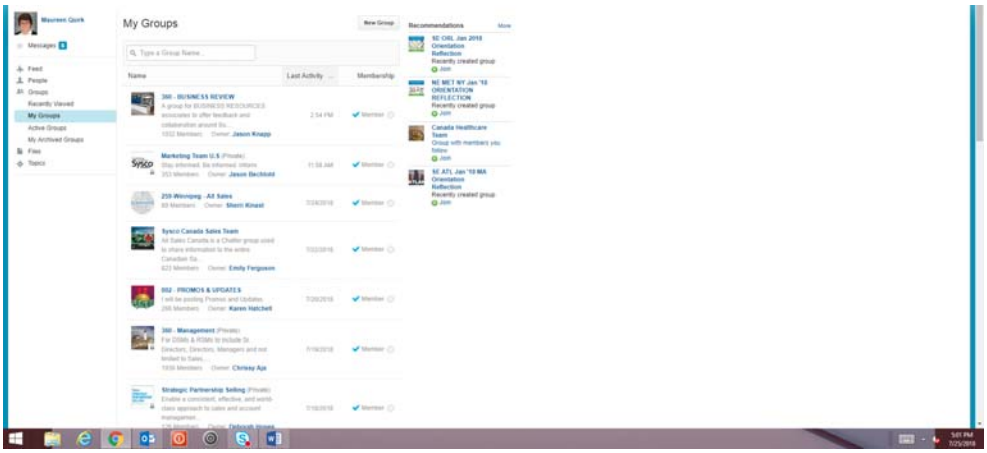
I.4 Business Outcome Presentation

Why Menus?

- Uniform method for engaging customers in menu development will help us streamline our messaging
- Higher sales, higher margins, more sustainable growth
- Owning the menu helps us acquire and grow market share
- Differentiates us from the competitors
- On-trend and addresses current pain points

I.5 Customer Outcomes Presentation

I.6 Chatter Group



I.7 ROI Goal Matrix

Innovation	Customer Adoption Rate	Sales Growth	Successful according to ROI Objective – Year 1
Menus	35%	11.5%	Yes

I.8 Incentive Program

With endorsement from my organization's leadership team, I created an incentive program

Financial Incentives: Menu Blitz

Item	**Customer Incentive**	**Considerations**	**Sales Associate Incentive**
If Menu is created	they will receive a 25% credit on account up to	All orders must average $1000 or more. The sales associate must submit the credits to their	The sales associate gets a 10% override on any credit

	$250 for each menu.	local credit department.	amount paid to a Menu customer.

Additional Enhancements

- Each company's top performing sales associate by total sales on new menus at the end of each gets entered into a drawing for a new car lease for two years (up to $400 a month).

I.9 Training Protocol

Menu Portal Training

- Need to let go of past practices (i.e. spreadsheets, voicemails, traditional follow up channels) in order to move to move to the new Menu platform —will ultimately hurt our adoption efforts with customers
- Two reports are interesting and valuable
  - Account sales history (Stanley Cup report: what did I buy last year; when the sales associate is getting ready to go to an account; everything the account bought 11 months ago)

    At least what we got last year; great for seasonal accounts;

    don't lose what you have last year

    Also gives sales details
  - Last month sales

- Main Screen shows
  - Opportunities for that account
    - Opportunities without SUPC's are useless (no reports will be pulled)
  - Activities
  - Sales for account
- My Activity Report
  - Is THE management tool of the system
  - Should look at this twice a day (morning to look at day prior) and mid-day to see if there is anything coming up

Dashboards

- OpCo Executive Dashboard – (My District)

    - Shows DSM district as a whole
        - Pipeline
            - Proposed and Commit should be DSM focus
        - Closed/Won
        - Capture Rate
- OpCo DSM Dashboard – (My MA's)
    - Capture Rate (Week 10 this starts to show)
    - Closed/Won
    - Pipeline

Top Things for sales associates to do

- View My Activity Report twice a day
- Log every call each time we touch a customer
- Commit to running My Clean Room once a month
- Every Opportunity needs to have SUPC's
- Set expectations
- Provide Feedback
- Consequences – natural or intended
- Training and Development
- Resources (i.e. does everyone have smartphones?)
- Internal Motivation
- Job Capacity

Appendix J Innovation Playbook

Abstract for Organizational Innovation Playbook

Step-by-Step Guide for Deploying Innovation: To deploy innovation within our organization, there are a number of steps that you can take and resources available to help. Please review this playbook to understand what resources may be available to you.

Contents:

- Overview of Innovation Process and Role of Playbook
- Scorecard for measuring innovation effectiveness
    - ROI Scorecard *.xlsx format
    - Links to basic company reports (customizable)
- Communication Presentations, Tips and Techniques
    - Full PowerPoint presentations that you can customize/localize
    - Scripts and talking points
- Training Modules/Platforms
    - Use the learning platform module as-is, or add custom quizzes for your team
- Feedback platforms
    - Surveymonkey template for pulse survey
    - Drag and Drop question bank
- Chatter group how-to's and charters
    - To be successful, each member of your team must know how to use the functions of our CRM. In this section, how to enable Chatter to help your teams get the most out of this tool.
- Incentive Guidelines
    - Finance-approved parameters for incentives
- Customer POS
    - One-page overview that can be handed directly to customers
    - Translation available
- Business Transformation/Support Team Tools
    - Job profiles for BTT roles