# Herramienta Health-Check

**INCREMENTA**
Innovation and creativity mentality advancement in SMEs

Este kit de herramientas de autoevaluación se ha creado para evaluar el contexto de Creatividad & Colaboración del desarrollo organizacional de las pymes, dentro de los estándares de gestión de la innovación.

## Introducción

El **kit de herramientas Health-Check** está dirigido a:

· Crear oportunidades para que las pymes mejoren significativamente su implementación de la innovación de acuerdo con los Estándares Europeos de Gestión de la Innovación que hacen referencia a la gestión de la creatividad y la colaboración.

· Proporcionar un diagnóstico rápido de las Pymes que les ayuden a evaluar los elementos críticos/características que afectan a su nivel de excelencia en la gestión de la creatividad y colaboración;

· Involucrar a los propietarios o/y gerentes de las pymes en una evaluación fácil de su toma de decisiones en el desarrollo de un entorno de creatividad y colaboración en sus empresas

Puede ser usado por las propias compañías, o como alternativa puede ser asistido por un consultor o mentor/facilitador si es necesario

La evaluación permite una reflexión profunda sobre el funcionamiento de la empresa en términos de creatividad & colaboración y sus actividades, analizando sus puntos fuertes así como las áreas en las que necesita mejorar.

Hay **4 áreas/secciones principales** que pueden evaluar el desarrollo organizativo de la empresa en relación al contexto de creatividad & colaboración:

1. Liderazgo;
2. Redes & asociaciones;
3. Estructura;
4. Cultura

Cada sección está dividida en campos/subsecciones específicas (3 por sección y 12 en total) ej. 1.1 Visión & establecimiento de objetivos; 1.2 Motivación y delegación de tareas; 1.3 Comentarios. Cada aspecto se describe y califica en una **escala de cuatro niveles** (Desarrollo, Crecimiento, Madurez y Sostenibilidad), basada en cuatro **declaraciones**. Cada declaración intenta reflejar la situación más probable que se espera en esta etapa de desarrollo de los resultados actuales de la empresa en términos de colaboración & creatividad.

Para que el proceso de evaluación tenga resultados actualizados, cada aspecto debe ser evaluado y el resultado debe ponerse en la casilla de evaluación.

El cuestionario Health-Check provoca que los propietarios y/o gestores impulsen el cambio resaltando las áreas prioritarias que necesiten intervención. También les ayudará a mejorar ciertos aspectos de los negocios para mejorar la innovación y el crecimiento. Es una parte complementaria de la **Guía del Sistema de Gestión de la Innovación** para las pymes y se puede usar con las guías de Creatividad y Colaboración donde se explican términos, definiciones y conceptos clave y se basa en el estándar CEN/TS 16555: partes 5 y 6 que constituyen la fundación de todos los resultados del **proyecto INCREMENTA**..

# ¿CÓMO USAR EL KIT DE HERRAMIENTAS?

El kit de herramientas consiste en las **tres partes** siguientes:

1. Marco de evaluación Health-Check (4 hojas excel)

2. Hoja de cálculo (1 hoja excel)

3. Perfil de Evaluación (diagramas de diagnóstico) - 2 hojas excel

Para que el proceso sea efectivo, la plantilla, partes interesadas y la gente relacionada con la empresa debe estar incluida. Todos deben evaluar individualmente la etapa de desarrollo de la empresa, después todo el grupo la debate y se ponen de acuerdo en la decisión final por consenso. La evaluación de aspectos particulares del funcionamiento de las empresas no es fácil ya que a menudo los miembros del equipo y los miembros de la Junta ven los problemas analizados de manera diferente. Esta aparente debilidad del marco, sin embargo, puede resultar una Fortaleza de la herramienta en la medida que puede permitir la obtención de una foto real del contexto de colaboración & creatividad de la empresa. Para ver la dinámica de la empresa, el equipo se debe comprometer a repetir esta evaluación regularmente, por ejemplo, una vez al año

# EL PROCESO DE EVALUACIÓN

**Primer paso:** Uso del Marco de Evaluación Health-Check

Tienes que examinar cuidadosamente todo el marco (ser **A1, A2, A3, A4**) y después empezar a leer sección a sección (aspecto a aspecto). Primero tienes que hacerte a la idea de en qué etapa de desarrollo organizativa está la empresa (en qué campo de la escala de cuatro).

Después de eso, debes leer atentamente las respectivas declaraciones y elegir uno de los cuatro posibles niveles (áreas principales) en los que se divide la sección y que en tu opinión más corresponda con el nivel de progreso. Después debes anotar el número seleccionado en la casilla amarilla correspondiente. Estas acciones deben hacerse consecutivamente para todos los 12 aspectos de desarrollo organizativo, mediante los cuales se debe evaluar el contexto de colaboración y creatividad del desarrollo de la

empresa. Hay un ejemplo de selección y registro de puntuaciones en una de las áreas principales/secciones (1. Liderazgo) en el anexo **A1**)

## Segundo paso: Leer los resultados en la hoja de cálculo

Después de terminar de leer las declaraciones, elegir los títulos adecuados y completar la puntuación respectiva para los 12 aspectos del desarrollo organizacional, debe pasar a la siguiente etapa: lea los resultados en la hoja de cálculo (anexo A5). Cada área de: 1. Liderazgo, 2. Redes y asociaciones, 3.

## Tercer paso: Evaluar el perfil y preparar un plan de acción para mejorar

Esta etapa del proceso consiste en perfilar la empresa representando los resultados mediante visualización gráfica (perfil de evaluación). El ejemplo se da en los anexos A6 y A7.

La herramienta le proporciona dos tipos de diagramas: un gráfico de barras y un diagrama de radar.

Estructura y 4. Cultura se evalúa respectivamente como un promedio de los valores de los tres aspectos que incluyen. Siguiendo el ejemplo de A1, donde para el aspecto "1.1. Visión y establecimiento de objetivos "la puntuación es 0.5; para los aspectos" 1.2. Motivación y delegación de tareas "y" 1.3. Retroalimentación "las puntuaciones son respectivamente 1.0 y 1.25, puede ver en A5 que el resultado de la área "1. Liderazgo" será un promedio de las puntuaciones de estos tres aspectos (o 0,92).

Puede utilizar ambos según el propósito del análisis.

Dado que la herramienta puede ser utilizada para la autoevaluación por una persona de la empresa o por un equipo, depende de la dirección qué tipo de proceso de evaluación utilizar: individual o en equipo. La empresa también puede contratar a un consultor o facilitador.

Con base en el análisis en esta etapa se puede continuar con la selección de áreas prioritarias, resaltadas en la etapa anterior; y desarrollo de un plan de acción, si es necesario (plan de mejora).

# Repasemos estos tres pasos:

## *Primero: Evalua el nivel de progreso de los cuatro aspectos organizacionales de tu empresa usando el Health-Check Marco de Evaluación.*

El marco de evaluación Health check consiste en un total de **ocho hojas**. Se te pide hacer la evaluación en las siguientes **cuatro hojas Excel** para las cuatro principales áreas organizativas: 1. Liderazgo; 2. Redes & asociaciones; 3. Estructura; 4. Cultura. Ver anexos **A1, A2, A3, A4**!

## *Segundo: Mire los resultados de su calificación de los 12 aspectos organizacionales de su empresa en la Hoja de cáculo*

Se le pide que abra la hoja Excel Hoja de cálculo donde verá el resumen de los aspectos organizacionales evaluados y sus resultados promedio para las cuatro áreas principales: 1. Liderazgo; 2. Redes y asociaciones; 3. Estructura; 4. Cultura (A1 a A4). Este es un perfil de vía rápida de la empresa que resume los resultados de una evaluación en términos de colaboración y creatividad.

Existe un ejemplo de hoja de Cálculo (A5) generada automáticamente, basada en las puntuaciones registradas previamente en las Hojas Excel A1 a A4 para los 12 aspectos organizativos.

Nota: En general (en esta versión del Toolkit), el porcentaje para las cuatro áreas principales es igual al 25% y solo en algunos casos específicos se podrían usar diferentes.

En la hoja de Cálculo, en lugar de calcular la media de las áreas principales, es posible calcular un valor ponderado sobre la base de las cifras establecidas en el marco de evaluación del chequeo médico (A1 a A4). Esta es una opción para la versión futura del Toolkit.

## *Tercero: Mira el Diagrama de diagnóstico que representa el perfil de evaluación de tu empresa!*

Se le pide que abra las dos hojas de Excel (anexos A6 y A7), donde verá el perfil visual de la empresa en términos de colaboración y creatividad. Estos anexos representan el perfil de la empresa ejemplar que se basa en datos proporcionados previamente en el marco de evaluación de Health Check (A1 a A4).

Notas: En el caso del gráfico de barras, es importante saber que se podrían utilizar diferentes pesos previstos para la versión futura.

Para el diagrama de radar, esta posibilidad podría usarse solo en caso de diferentes pesos para cada componente (12 en total).

# ANEXOS

# A1. Liderazgo

En esta área principal "1. Liderazgo ", los tres aspectos organizativos son los siguientes:" 1.1 Visión y objetivos de configuración "," 1.2 Motivación y delegación de tareas "y" 1.3 Retroalimentación ". Los evaluó de la siguiente manera: para el aspecto 1.1, la puntuación es de solo 0,5 puntos, ya que se encuentra en el nivel de desarrollo inicial; el aspecto 1.2 está algo más avanzado (recibe 1,00 puntos) y el aspecto 1.3 está mejor desarrollado ya que se pone en etapa de crecimiento con 1,25 puntos.
La puntuación seleccionada se registra en los respectivos cuadros amarillos. El resultado promedio calculado para "1. Liderazgo "será 0,92 (ver A5).

## HEALTH CHECK EVALUATION FRAMEWORK (Collaboration & Creativity) - 1. Leadership

| Collaboration & Creativity / Resources | Life Cycle Stages (Evaluation criteria) | | | |
|---|---|---|---|---|
| | Development Stage | Growth Stage | Maturity Stage | Sustainable Stage |
| **MAIN AREA: 1. LEADERSHIP** | | | Weight for the measured area: | 25% |
| Aspects | Statements | Statements | Statements | Statements |
| 1.1. Vision & setting objectives | Company is led by founders. Company vision is general and known by founders only. There are no mission statements. The objectives are broad. There are no creativity and collaboration activities currently undertaken or planned. There is no strategy for creativity or collaboration. Innovation management is not in place. Planning is top-down and undertaken on an ad hoc basis without the involvement of the staff. Staff execute decisions but are not able to influence them. Terms like innovation, creativity and collaboration are mentioned but there is no real plan to implement them. | Company is led by founders with some input from Board members. The vision is clear but not well communicated within and outside the company. There is a draft strategy for creativity and collaboration which was developed without input by staff. There is a process by which staff can contribute new product ideas or process improvement, but it is not well known or well used. Staff can influence some decisions, depending on how open their managers are, but they have little formal input. Concepts of innovation, creativity and collaboration are considered important and there are high level plans to implement them. | Vision comes from leaders and the majority of managers. The mission statement is well communicated within and outside the company. Management by objectives (MBO) is in place. Innovation management is embedded in management practice. The SMART objectives are developed in line with an innovation management approach. Innovation, creativity and collaboration are all included in the company strategy which was developed using a creative and collaborative process. Individual staff are making attempts to introduce innovation, creativity and collaboration within the company. | Innovation, creativity and collaboration are all included in the company strategy which was developed using a creative and collaborative process. All managers attempt to use innovative methods. MBO is in place as are SMART goals. The teams and managers communicate the vision and mission effectively with the stakeholders and the external environment. The company is well recognised as an innovation leader. You and other management actively promote creativity and innovation. You are using tools such as the creativity scorecard and collaboration scorecard and are actively working to improve your performance. |

| | | | | | | | | | | | | | | | | |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| | 0.25 | 0.50 | 0.75 | 1.00 | 1.25 | 1.50 | 1.75 | 2.00 | 2.25 | 2.50 | 2.75 | 3.00 | 3.25 | 3.50 | 3.75 | 4.00 |

| You are asked to rate the level of progress of this organizational aspect of your company. Select and put in the yellow box only one number from one of the above fields with statements. | **0.50** |
|---|---|

| 1.2. Motivation & tasks delegation | Staff are not motivated. There is a common feeling of not being useful for the company and being burnt-out. There is little or no recognition of staff performance as a policy. Task allocation is incidental and depends on the culture and experience of individual managers. | Achievements are noticed and recognised informally. There is no official motivation and appraisal system. Staff members only undertake the tasks listed in their job description. Certain measures to nurture entrepreneurial and innovative thinking and collaboration exist. The delegating tasks are used only in project management. | Staff members undertake tasks that go beyond their job description. The company has identified and applied best practices to motivate the staff and track progress and results in terms of collaboration and creativity. Staff often self-choose tasks and staff success is formally noted and celebrated. | There is a well-established collaborative and creative environment. Formal procedures for allocating tasks and encouraging employees to appraise their achievements are well used. All staff members feel fully appreciated. Creativity and collaboration are actively rewarded. You are using tools such as the creativity and collaboration scorecards and are actively working to improve your performance. |
|---|---|---|---|---|

| | | | | | | | | | | | | | | | | |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| | 0.25 | 0.50 | 0.75 | 1.00 | 1.25 | 1.50 | 1.75 | 2.00 | 2.25 | 2.50 | 2.75 | 3.00 | 3.25 | 3.50 | 3.75 | 4.00 |

| You are asked to rate the level of progress of this organizational aspect of your company. Select and put in the yellow box only one number from one of the above fields with statements. | **1.00** |
|---|---|

| 1.3. Feedback | Feedback from staff is usually ad hoc and case-by-case. There is no formal monitoring and evaluation mechanism related to the decision-making process. Mainly verbal feedback is used. There are very few formalised administrative procedures where feedback is accepted. | Feedback is written and formalised in some existing monitoring mechanisms. Sessions with feedback from the staff create a friendly environment to create openness and creativeness. Feedback is used in the collaboration process to measure staff effectiveness but not implemented as a system. | Some procedures include collaboration approach and creativity. Managers and staff work together in a collaborative and creative environment. Staff contribute to the clarification of priorities and strategy, based on constructive feedback. | A culture of open innovation and regular feedback is established and supported by the company strategy. Feedback is an integral element of the MBO system. KPIs for collaboration and creativeness are in place and are based on feedback related to the desire for innovation. You are using tools such as the creativity and collaboration scorecards and are actively working to improve your performance. |
|---|---|---|---|---|

| | | | | | | | | | | | | | | | | |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| | 0.25 | 0.50 | 0.75 | 1.00 | 1.25 | 1.50 | 1.75 | 2.00 | 2.25 | 2.50 | 2.75 | 3.00 | 3.25 | 3.50 | 3.75 | 4.00 |

| You are asked to rate the level of progress of this organizational aspect of your company. Select and put in the yellow box only one number from one of the above fields with statements. | **1.25** |
|---|---|

# A2. Redes & Aso-ciaciones

En esta área principal "2. Networking & partnership ", los tres aspectos organizativos son los siguientes:" 2.1 Colaboración interna "," 2.2 Delegación de motivación y tareas "y" 2.3 Comunicación y coordinación; confiar". Los evaluó de la siguiente manera: para el aspecto 2.1, la puntuación es de solo 0,75 puntos, ya que se encuentra en un nivel de desarrollo relativamente avanzado; el aspecto 2.2 también está en la misma etapa (recibe 0.75 puntos) y el aspecto 2.3 está hasta cierto punto aún mejor desarrollado con 1.25 puntos. El resultado promedio calculado para "2. Networking & Partnership "será 0,92 (ver A5)

## HEALTH CHECK EVALUATION FRAMEWORK (Collaboration & Creativity) - 2. Networks & Partnership

### Collaboration & Creativity / Resources — Life Cycle Stages (Evaluation criteria)

| | Development Stage | Growth Stage | Maturity Stage | Sustainable Stage |
|---|---|---|---|---|
| **MAIN AREA: 2. NETWORKS AND PARTNERSHIPS** | | | | Weight for the measured area: **25%** |
| **Aspect / Component** | Statements | Statements | Statements | Statements |
| **2.1. Internal collaboration** | Company is a closed type of organisation which lacks a collaboration infrastructure and intensity. Collaboration occurs mainly in project teams. Staff tend to share the work they do only when asked for it. Conversations and joint efforts across departmental boundaries are difficult. Low collaboration coexists with a low level of internal competition, which does not stimulate creativity and idea generation. Staff are not actively encouraged or rewarded for collaboration. | All staff do not have a clear position within a group and their roles are not clearly related. Functional teams exist, but team roles are often unclear and governance structures are vague. The outcomes of collaborative efforts are often shared but only upon request. The teams often share work after initiating or completing projects. The high level of internal competition coexists with a relatively low level of collaboration, but this encourages some creativity and openness. | Decisions begin to be taken on basis of clear criteria developed and understood by staff. The culture includes creativity and design thinking. Cross-functional teams work on open innovation mode. The staff and teams routinely revisit and debate the outcomes of their collaborative efforts. They seek opportunities to collaborate as a built-in or natural part of their planning. The internal collaboration and a low level of competition are nearly balanced. | Company is an open type of organisation. All staff members participate in decision-making process. Well-balanced internal competition with collaboration is in place. Teams share work and effectively connect with additional project groups. The owners and top management promote best practices for working together, based on the innovation management standards. Staff agree on shared intentions, understand what success means, have a shared level of engagement and establish common goals by negotiation. Staff are encouraged to collaborate & rewarded for doing so. |
| | 0.25　0.50　**0.75**　1.00 | 1.25　1.50　1.75　2.00 | 2.25　2.50　2.75　3.00 | 3.25　3.50　3.75　4.00 |
| | *You are asked to rate the level of progress of this organizational aspect of your company. Select and put in the yellow box only one number from one of the above fields with statements.* | | | **0.75** |
| **2.2. External collaboration** | There is little or no real experience in collaborating with external stakeholders and partners. Relationship between the company and some external organisations are tense. The founders do not understand the open innovation concept well and do not support external collaboration. | External collaboration is occasional and related to specific tasks and projects. The partnerships are a reaction to perceptions and not well thought through or chosen. There is no proactive approach for external collaboration on a broader scale. One person or unit are engaged in formal work to create external collaborative networking and alliances. The planning of collaboration is top-down. Some managers begin understanding the role of openness. | External collaboration is frequent and usually based on top management decisions. Company has contracts with key decision-makers and has established communication channels with main stakeholders. Collaboration is becoming an essential part of the innovation strategy. There are many international and local networks where the company is a member and their role and impact are growing. Open innovation approach is acknowledged by most of the managers and staff. | External collaboration is formalised as a system. Stakeholders are engaged in a joint decision-making process based on the principles of open innovation. The company is part of the local business community through diverse initiatives and networks. The external collaboration strategies are integrated into the business plan and progress tracked. Partners are carefully chosen on the grounds of what they bring to the partnership. External collaboration is used to complement core competencies, reduce costs and bring complementary expertise. |
| | 0.25　0.50　**0.75**　1.00 | 1.25　1.50　1.75　2.00 | 2.25　2.50　2.75　3.00 | 3.25　3.50　3.75　4.00 |
| | *You are asked to rate the level of progress of this organizational aspect of your company. Select and put in the yellow box only one number from one of the above fields with statements.* | | | **0.75** |
| **2.3. Communication and coordination; trust** | Company is not an open organisation. The mission is interpreted in different languages. Communication and problem solving are not transparent. Teams have difficulty aligning their work with a common purpose. There are few established communication channels and a low level of coordination exists. As a result, duplicate work is often carried out, communication efficiency is poor and trust is not created between staff. Creativity and collaboration are not supported. Staff may begin to feel dissassociated with the company as a whole, leading to attrition. | Staff members unite to define values, knowledge, expertise, and principles. Communication is partially formalised through established business processes and supported by communication tools. Some staff feel comfortable sharing thoughts and opinions in familiar domains. There is a shared space for project management. A common language for the organisation is partially formed. This supports internal collaboration and creativity to some extent. There are first steps in building up formal communication channels and increasing trust. | There are regular meetings between leaders and staff members. Formal communication channels serve decision making and information flow. You have a set of tools to support communication including those to share tacit information, expertise, and knowledge. Staff feel comfortable sharing their thoughts and opinions and provide adequate context for helping new staff members understand. Staff allowed time to think about the process or to have conversations with others that might generate some insight or spark some ideas. | Open organisation is in place. There is a system for measuring the effectiveness, and efficiency of the communication. A high level of coordination based on formal channels is achieved. Shared experience, tacit information, and values serve decision-making, conflict resolution, and assessment processes among staff members and managers. A common language is created. Various forms of open innovation are in place. Trust is everywhere. The leader's commitment to clear, open communication has set the tone for his or her team and organisation. |
| | 0.25　0.50　0.75　1.00 | **1.25**　1.50　1.75　2.00 | 2.25　2.50　2.75　3.00 | 3.25　3.50　3.75　4.00 |
| | *You are asked to rate the level of progress of this organizational aspect of your company. Select and put in the yellow box only one number from one of the above fields with statements.* | | | **1.25** |

# A3. Estructura

*En esta área principal "3. Estructura ", los tres aspectos organizacionales son los siguientes:" 3.1 Sistema y procesos "," 3.2 Roles "y" 3.3 Funciones ". Los evaluó de la siguiente manera: para el aspecto 3.1, la puntuación es de solo 0.25 puntos, ya que se encuentra en un nivel de desarrollo muy temprano; el aspecto 3.2 también está en la misma etapa pero mejor desarrollado (recibe 1.0 puntos) y el aspecto 3.3 está en la etapa similar con 0.75 puntos. El resultado promedio calculado para "3.*

## HEALTH CHECK EVALUATION FRAMEWORK (Collaboration & Creativity) - 3. Structure

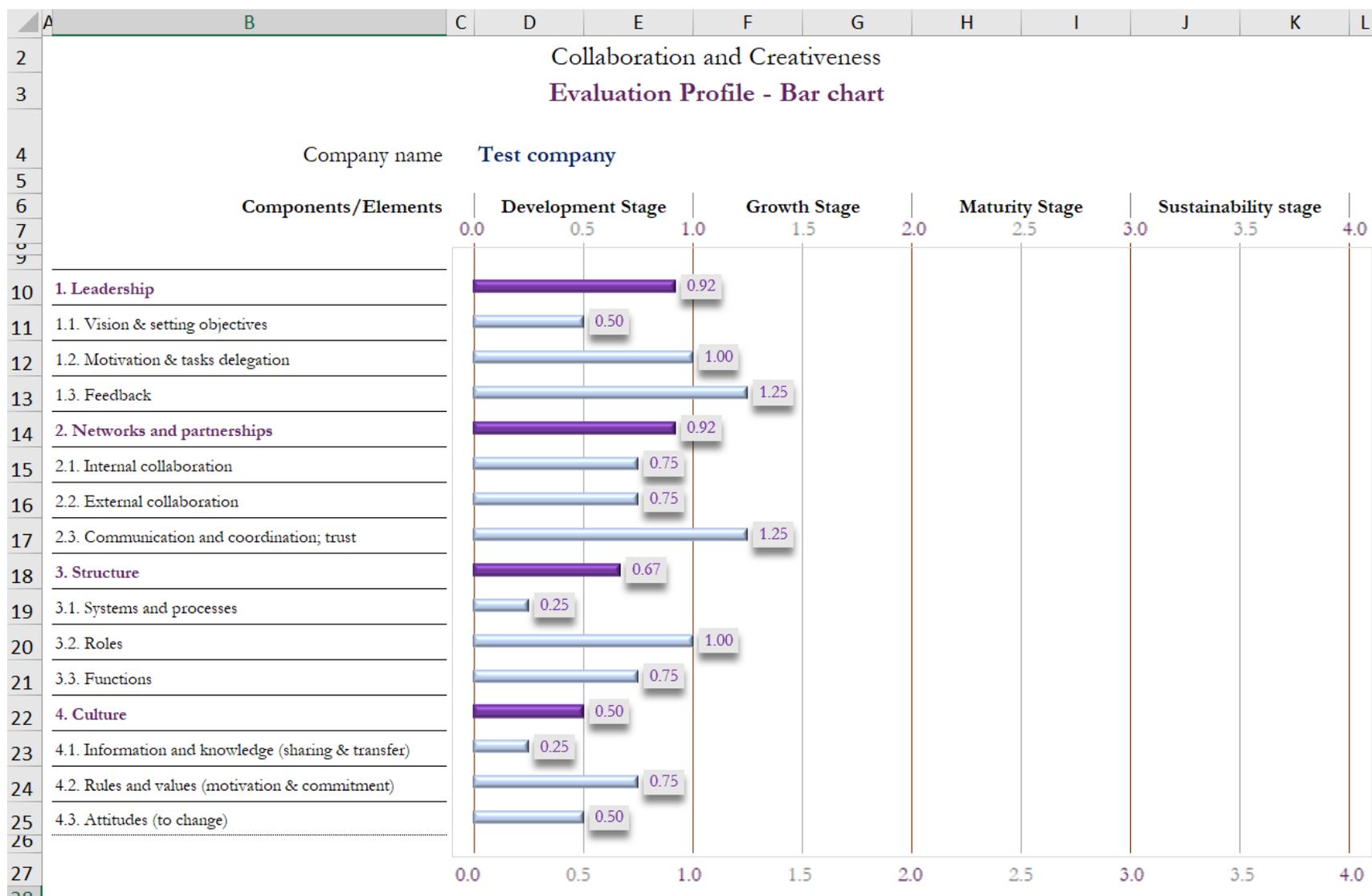| Collaboration & Creativity / Resources | Life Cycle Stages (Evaluation criteria) | | | | | | | | | | | | | | | |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| | Development Stage | | | | Growth Stage | | | | Maturity Stage | | | | Sustainable Stage | | | |
| **MAIN AREA: 3. Structure** | | | | | | | | | | | | | *Weight for the measured area:* | | | 25% |
| **Aspect / Component** | Statements | | | | Statements | | | | Statements | | | | Statements | | | |
| **3.1. Systems and processes** | Structure and processes are not focused on collaboration, creativity or innovation management. A low level of openness and a high level of hierarchical governance are in place. You lack clear goals, structure and governance mechanisms for setting up processes and fostering collaboration and creativeness. No collaboration and creativity system exist. There is no mutual trust or flexible working conditions. Staff operate in silos and do not pass information to each other or learn about each other's experiences. | | | | Collaboration and creativity are managed informally through various tools and project-based approaches. Innovation management is evolving. Top management is committed to collaboration and creativity. Good practices are used as a base for idea generation. The standards of collaboration are used in development and commercialization stages. Staff members have some opportunities to communicate with each other and work in different parts of the business. | | | | The collaboration and creativity process produces tangible, substantial, and sustainable results through joint participation and action. Existing systems and processes support the implementation of innovation management standards. Collaboration strategy defines the strategic aspects and it is implemented across the company through established and supported procedures. Managers and teams work across silos. | | | | Open innovation platforms and tools are implemented and managed as a system, changing the internal corporate culture. The developed system covers all aspects of the business and allows both organisational and project management. It covers economic value estimation, cost estimation, opportunity cost, etc. The procedures include measurement of creativity and collaboration by defined in a collaborative way specific KPI's. You are using tools such as the creativity scorecard and collaboration scorecard and are actively working to improve your performance. | | | |
| | 0.25 | 0.50 | 0.75 | 1.00 | 1.25 | 1.50 | 1.75 | 2.00 | 2.25 | 2.50 | 2.75 | 3.00 | 3.25 | 3.50 | 3.75 | 4.00 |
| | *You are asked to rate the level of progress of this organizational aspect of your company. Select and put in the yellow box only one number from one of the above fields with statements.* | | | | | | | | | | | | | | | 0.25 |
| **3.2. Roles** | There is an informal definition of roles for innovation management, creativity, and collaboration, using cross-functional teams and project-based approach. Roles are assigned informally based on expertise, years of experience and main business functions | | | | The roles for coordination of creativity and collaboration activities and tasks are well distributed among managers and staff. Staff skills are identified, evaluated and complementing to form cross-functional teams for innovation. | | | | There is a holistic approach with clearly and formally assigned roles for innovation management including creativity and collaboration management. Teams are built based on a system for role definition and opportunities for innovation. Innovation management standards are known, studied and recognised for benchmarking. | | | | An innovation management system is developed and standards are implemented. There is an evaluation system for managers and staff members focusing on key skills and competencies rather than formal structure and roles. The measurement system covers several aspects and overcomes separation within organisational silos. You are using tools such as the creativity scorecard and collaboration scorecard and are actively working to improve your performance. | | | |
| | 0.25 | 0.50 | 0.75 | 1.00 | 1.25 | 1.50 | 1.75 | 2.00 | 2.25 | 2.50 | 2.75 | 3.00 | 3.25 | 3.50 | 3.75 | 4.00 |
| | *You are asked to rate the level of progress of this organizational aspect of your company. Select and put in the yellow box only one number from one of the above fields with statements.* | | | | | | | | | | | | | | | 1.00 |
| **3.3. Functions** | Functions are formally defined but do not correspond fully to the strategy and objectives. There are many informal processes and divisions of responsibilities which are not acknowledged but without which the company could not operate. Creativity and collaboration are not officially in use although the managers and staff use them in the day to day problems solving. | | | | Functions, responsibilities, and roles correspond to fast-growing needs for teamwork. The distribution of roles and functions in project teams helps cross company communication and skill acquisition. There are some collaboration difficulties between projects and teams. The accent is on encouragement of creativity in project teams | | | | Formal functions of the main business areas correspond to the strategy and objectives within the MBO system. Cross-functional teams are involved in a well-managed and intensive collaboration. Open innovation approach and creative thinking are supported by the functions of the managers and staff. | | | | The functions are developed in the context of the structure and components of the MBO system. They follow the innovation management standards. An impact measuring system exists so the execution of functions (of teams and staff members) is measured by KPIs incl. time to market, the number of new products and services developed, the number of generated innovations, etc. | | | |
| | 0.25 | 0.50 | 0.75 | 1.00 | 1.25 | 1.50 | 1.75 | 2.00 | 2.25 | 2.50 | 2.75 | 3.00 | 3.25 | 3.50 | 3.75 | 4.00 |
| | *You are asked to rate the level of progress of this organizational aspect of your company. Select and put in the yellow box only one number from one of the above fields with statements.* | | | | | | | | | | | | | | | 0.75 |

# A4. Cultura

*En esta área principal "4. Cultura", los tres aspectos organizativos son los siguientes:" 4.1 Información y conocimiento "," 4.2 Reglas y valores "y" 4.3 Actitudes ". Los evaluó de la siguiente manera: para el aspecto 4.1, la puntuación es de 0.25 puntos, como en el nivel de desarrollo muy temprano; el aspecto 4.2 también está en la misma etapa pero mejor desarrollado (recibe 0.75 puntos) y el aspecto 4.3 está en la etapa similar pero con 0.50 puntos. El resultado promedio calculado para "4. Cultura "será 0.50 (ver A5)*

## HEALTH CHECK EVALUATION FRAMEWORK (Collaboration & Creativity) - 4. Culture

| Collaboration & Creativity / Resources | Life Cycle Stages (Evaluation criteria) | | | | | | | | | | | | | | | |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| | Development Stage | | | | Growth Stage | | | | Maturity Stage | | | | Sustainable Stage | | | |
| **MAIN AREA: 4. Culture** | | | | | | | | | | | | *Weight for the measured area:* | | | 25% | |
| Aspect / Component | Statements | | | | Statements | | | | Statements | | | | Statements | | | |
| 4.1. Information and knowledge (sharing & transfer) | Traditional approach. Information flows to and from the external ecosystem (authorities, clients, suppliers, etc.) and within the company mainly as accountancy reports. The information flows top down. Decision making is based on structured information. Creativity is met through sporadic measures. Tacit information and knowledge are not formally accumulated, archived and transferred among the staff. Managers share only what information they feel is required. | | | | Managers are reluctant to share too much information in collaborating with customers and supply chain. Communication flows easily and is reciprocated at all levels. Tacit knowledge is more often tied to internal collaboration. The customer data and experiences, demographics of customers, and cost structures are not shared as easily, if at all. There is no infrastructure that can handle unstructured information coming from the company. | | | | An open culture, empowered staff, flexible structure, integrated procedures, idea development systems, and good external partnerships exist. The infrastructure can seamlessly handle structured and unstructured information. It provokes tacit knowledge, and collaboration - internal, across cultures and distances, and in multiple agendas. Creativity and innovation are visibly driven and actively supported, based on collaboration in transferring information and knowledge. | | | | Collaboration and creativity are a culture and practice that is supported by a formalised system for sharing and transfer of information and knowledge. The system monitors and evaluates specific KPIs. IT tools that create a strategic capability for collaboration in all stages of the innovation management process: idea generation, concept development, implementation, portfolio management are implemented. | | | |
| | 0.25 | 0.50 | 0.75 | 1.00 | 1.25 | 1.50 | 1.75 | 2.00 | 2.25 | 2.50 | 2.75 | 3.00 | 3.25 | 3.50 | 3.75 | 4.00 |
| | *You are asked to rate the level of progress of this organizational aspect of your company. Select and put in the yellow box only one number from one of the above fields with statements.* | | | | | | | | | | | | | | | 0.25 |
| 4.2. Rules and values (motivation & commitment) | Rules are considered more important than values. Guidelines and channels for encouraging diverse points of view about decisions are under development. Many rules are not documented officially and are a result of collaboration among a limited number of managers. Leaders and top managers are uncommitted. | | | | Written rules are in place and they correspond to shared values. Leaders are open to receiving feedback and creating an environment where people feel safe providing it. Staff and teams are motivated to share stories about successes, but not about failures. Rules for collaboration, information sharing, and creativity are in use in the project teams. Most of the rules for collaboration and creativity support decision-making practices on project management level. | | | | Rules for collaboration, information sharing, and creativity are embedded in the company internal guidelines. There are rules and a formal process for decision-making and idea generation. Such rules describe the channels for collaboration and sharing decision-making files. The procedures for group discussions motivate the staff. Materials are shared openly via multiple channels and methods for feedback. Leaders openly encourage others. Staff feel empowered to share opinions constructively on any matter relevant to their work. | | | | Rules are elaborated based on good practice that is a result of shared values. Guidelines and channels encourage diverse points of view within teams and decisions that are aligned with staff's preferences for feedback. The performance indicators are used to encourage desired behaviour and to measure the progress of staff creativity and collaboration. Staff share materials on collaborative platforms that come with clear guidelines, and encouragement in using open technical standards in their work. Staff are committed and motivated. | | | |
| | 0.25 | 0.50 | 0.75 | 1.00 | 1.25 | 1.50 | 1.75 | 2.00 | 2.25 | 2.50 | 2.75 | 3.00 | 3.25 | 3.50 | 3.75 | 4.00 |
| | *You are asked to rate the level of progress of this organizational aspect of your company. Select and put in the yellow box only one number from one of the above fields with statements.* | | | | | | | | | | | | | | | 0.75 |
| 4.3. Attitudes (to change) | Aptitude for change and risk-taking are not a part of the culture and is not officially supported by the leaders. There is no formal process for or understanding of change management. When a process needs to change the staff, teams, and leaders are not engaged directly with and don't understand their roles. There is no communication about the change or training or support for clarification and the staff are not engaged with regarding the change. | | | | Only leaders are involved in decision making for change. The staff has enthusiasm for new ideas and challenges and in principle risk-taking and failures are tolerated. No formal process but small-scale changes are managed reactively, although the staff is proactive and can take responsibility for new projects and growth opportunities. The change-maker, followers, innovators, or stabilizers are still not enough well recognised and supported proactively. | | | | Readiness for making changes is a policy of the leaders. A general openness for change and risk-taking exists. Changes are accepted and managed by a formalised process. Staff is involved in changes and mutual responsibility is promoted. Suggestions usually involved in the decision-making for low risks and is keen to be trained in creativity and innovation management. | | | | Change and risk-taking is part of the culture. Formal change management processes exist. The leaders and staff interact collaboratively with the change, The company work towards driving radical and disruptive innovations. Innovation Management standards are implemented. Staff is involved in a collaboration to address the problems of changes. Performance indicators to measure risk-taking and impact of the changes are in place | | | |
| | 0.25 | 0.50 | 0.75 | 1.00 | 1.25 | 1.50 | 1.75 | 2.00 | 2.25 | 2.50 | 2.75 | 3.00 | 3.25 | 3.50 | 3.75 | 4.00 |
| | *You are asked to rate the level of progress of this organizational aspect of your company. Select and put in the yellow box only one number from one of the above fields with statements.* | | | | | | | | | | | | | | | 0.50 |

# A5. Hoja de cálculo

**Calculation Sheet**

Company name **Test company**

| COMPONENT | ELEMENT | RESULT | COMMENT |
|---|---|---|---|
| 1. Leadership | | 0.92 | |
| | 1.1. Vision & setting objectives | 0.50 | |
| | 1.2. Motivation & tasks delegation | 1.00 | |
| | 1.3. Feedback | 1.25 | |
| 2. Networks and partnerships | | 0.92 | |
| | 2.1. Internal collaboration | 0.75 | |
| | 2.2. External collaboration | 0.75 | |
| | 2.3. Communication and coordination; trust | 1.25 | |
| 3. Structure | | 0.67 | |
| | 3.1. Systems and processes | 0.25 | |
| | 3.2. Roles | 1.00 | |
| | 3.3. Functions | 0.75 | |
| 4. Culture | | 0.50 | |
| | 4.1. Information and knowledge (sharing & transfer) | 0.25 | |
| | 4.2. Rules and values (motivation & commitment) | 0.75 | |
| | 4.3. Attitudes (to change) | 0.50 | |

# A6. Perfil de evaluación- diagrama de barras

**Collaboration and Creativeness**

**Evaluation Profile - Bar chart**

Company name    **Test company**

| Components/Elements | Development Stage | Growth Stage | Maturity Stage | Sustainability stage |
|---|---|---|---|---|
| | 0.0    0.5    1.0 | 1.5    2.0 | 2.5    3.0 | 3.5    4.0 |
| 1. Leadership | 0.92 | | | |
| 1.1. Vision & setting objectives | 0.50 | | | |
| 1.2. Motivation & tasks delegation | 1.00 | | | |
| 1.3. Feedback | 1.25 | | | |
| 2. Networks and partnerships | 0.92 | | | |
| 2.1. Internal collaboration | 0.75 | | | |
| 2.2. External collaboration | 0.75 | | | |
| 2.3. Communication and coordination; trust | 1.25 | | | |
| 3. Structure | 0.67 | | | |
| 3.1. Systems and processes | 0.25 | | | |
| 3.2. Roles | 1.00 | | | |
| 3.3. Functions | 0.75 | | | |
| 4. Culture | 0.50 | | | |
| 4.1. Information and knowledge (sharing & transfer) | 0.25 | | | |
| 4.2. Rules and values (motivation & commitment) | 0.75 | | | |
| 4.3. Attitudes (to change) | 0.50 | | | |

0.0    0.5    1.0    1.5    2.0    2.5    3.0    3.5    4.0

# A7. Perfil de evaluación – diagrama de radar



Collaboration and Creativeness
Evaluation Profile - Radar diagram

Company name    Test company

Components/Elements

1. Leadership
2. Vision & setting objectives
3. Motivation & tasks delegation
4. Feedback
5. Networks and partnerships
6. Internal collaboration
7. External collaboration
8. Communication and coordination; trust
9. Structure
10. Systems and processes
11. Roles
12. Functions
13. Culture
14. Information and knowledge (sharing & transfer)
15. Rules and values (motivation & commitment)
16. Attitudes (to change)