

SWARM
VISION

A background image of a modern office interior with large windows. In the foreground, a man in a grey blazer is shaking hands with a woman in a striped shirt and glasses. Another man in a grey sweater is sitting next to her, looking on. In the background, a woman in a white shirt is standing and looking at a laptop. The scene is bright and professional.

How to Use Swarm Vision — The Guide



Welcome to Swarm Vision.

The Swarm Innovation Profiler lets you view your workforce, and candidates, through a whole new lens, revealing their hidden innovation talent.

Here is a quick start guide to success with the Profiler.

HOW TO USE SWARM VISION

Three Steps



Step 1

Decide on your goals and whom you want to profile

As with any new endeavor, it's important to decide on your goals, what you want to achieve, and what success looks like.



Some companies use the Profiler in their hiring, to increase the number of innovators in their workforce, or hire for specific initiatives.



Other companies use the Profiler to identify the innovation talent already in their workforce, form stronger teams and retain high value talent.



I want to (check as many as apply)

- ☐ Hire more innovators
- ☐ Identify innovators already in our workforce
- ☐ Understand and be able to recognize innovators
- ☐ Understand our innovation capabilities by department, function or region
- ☐ Compare our company to international innovation talent benchmarks
- ☐ Retain innovative employees
- ☐ Form stronger innovation teams
- ☐ Create a dedicated innovation capability function
- ☐ Education management about innovation
- ☐ Create a culture of innovation based on data, not guesswork

According to your goals, decide whom you want to profile:

- Will you zoom in on a specific department or business unit?
- Or perhaps focus on a level in the organization, such as the business unit leaders?
- Or will you profile candidates for open positions?



Answering these questions will help you define whom you need to profile, and estimate how many Profiler licenses you will need.

Make a list of these people with their first name, last name and company email address.

Identify the people you want to profile

Depending on the goals you set, you can define the people you'd like to invite to take the Profiler.
For example to:



Hire more innovators

Profile candidates that meet the basic specs for open positions



Identify innovators already in your workforce

Profile as broad a swath of employees as you can



Raise entire company's innovation profile

Profile a sample across the organization & set a goal



Help a specific department, function or region become more innovative

Profile all of them, or a representative sample



Improve a specific team

Profile all of their members and leaders



Form new innovation teams

Profile all potential team members



Step 2

Communicate with the people you want to profile, and collect data

Once you've decided whom you want to profile, you need to invite them to take the Profiler! We suggest that you send out an email 2-3 days in advance. The email should introduce the Swarm Innovation Profiler, cover your purpose, the benefit to employees for taking the Profiler, and how the results will be used. It's a good idea to also include a deadline for completing the Profiler. Two weeks is usually plenty of time to fit into most work schedules.

Send out some advance communications

Here are some things to consider when communicating about the Profiler:



See below for a sample advance notification email to send to your users



Set a reasonable deadline. Two weeks is long enough to fit into most schedules and not so long that people put it off forever



Is there an important sponsor for this initiative? Considering sending the email in their name



Explain how results will be used



Emphasize how employees benefit from taking the Profiler



Ask them to set aside 15-20 minutes when they won't be interrupted.

Below is sample text of such an Advance Email. Please feel free to copy and modify it to your needs.

Dear (First Name):

In the next few days, you will receive an invitation to complete the Swarm Innovation Profiler.

The Profiler is an innovation assessment developed by Swarm Vision, a Silicon Valley innovation company. It measures eight skills strongly associated with innovation business results, from the front-end of innovation through implementation. Swarm Vision created the Profiler based on in-depth study of serial, successful entrepreneurs and intrapreneurs. They validated the Profiler over several large-scale studies in the Americas, Europe, Asia and Africa.

The Profiler is an online survey that takes about 15-20 minutes to complete. You will receive your results immediately upon completion. Your results will help you learn about the different types of innovation skills and your unique innovator strengths. This will be helpful for conversations with your supervisor, and for further developing your Innovation strengths. It could also help you increase your contribution by helping you select roles where you bring particular strengths.

As a valued employee of (Company Name), we are asking you to complete the Profiler by (End Date). We hope to learn how these skills are distributed across our workforce, and how combinations of these skills contribute to strong innovation teams.

(Admin Name) will see the aggregated results from all employees. This data will contribute to our understanding of the company's innovation capabilities and where we can improve, provide more effective training, form stronger innovation teams and offer you relevant opportunities.

Participation in the Profiler is strongly encouraged, but voluntary. You will receive an e-mail from Swarm Vision containing a link to the on-line survey. The assessment will be available until (End Date). We hope you take advantage of this opportunity to learn more about the unique capabilities that contribute to innovation, while you learn about your own personal strengths.

Please let me know if you have any questions.
(Admin Name)

Send out Profiler invitations

A couple of days after you send this advance email, go ahead and send out invitations to take the Profiler. You can either do this yourself, or ask Swarm to do it for you, which works best for large batches.

To send out invitation emails yourself, just copy and paste the sample text that you received as part of your subscription. It includes a unique code for your company. Send this same text to everyone on your list to be profiled. Here is an example of this text:

Dear (First Name):

(Sponsor_Name) has invited you to take the Swarm Innovation Profiler to learn all about the 8 innovation skills that drive real world business results. You'll get new insight into your own strengths as an innovation, and successful innovation teams.

Please register using this link and complete the Profiler before it expires on (Expiration_Date)
[https://enterprise.swarmvision.com/checkout/?level=4&discount_code=\(your_discount_code\)](https://enterprise.swarmvision.com/checkout/?level=4&discount_code=(your_discount_code))

Respectfully,

Warm Regards,
(Sponsor_Name)

If you'd like Swarm to send the invitations for you, prepare a spreadsheet with the users' First Name, Last name and email address in separate columns. Send it to: admin@swarmvision.com.

Here is an example of what the invitation says when Swarm sends it for you:

Dear (First Name):

We have set up an account for you on the Swarm Vision Enterprise website, so that you can take our Profiler, which is designed to identify your innovation skills.

Your login information is:

URL: <http://enterprise.swarmvision.com/profiler/login/>

Username: (Username)

Password: (User code)

This account was set up solely for your use, so please do not share it with anyone else. If you have any trouble logging in, please email: admin@swarmvision.com

After you complete the Profiler, you will receive your results immediately. Your personal results will inform your development planning, and the aggregated data will help us prioritize development support for innovators across the enterprise.

Please allow 15-20 minutes of uninterrupted time to complete the survey, with a reliable internet connection. Thankyou for your participation!

Warm Regards,
The Swarm Vision Team

Send out Profiler reminders

Once you send out invitations, you can see who has or has not completed the Profiler by logging into the Swarm Vision dashboard. Click "Show incompletes," and then click "Export" to export the list. Email reminders to these people. Plan to send 2-3 reminders during the period the assessment is open.

You need at least a Basic subscription to access the dashboard.

Select Export: ▾

Export

Show Completes

Show Incompletes

Clear

Help

Page: 1 ▾ ⏪ ⏩ 1 - 100 / 768 (1)

<input type="checkbox"/>	Name	Innov Score	Drive	Disrupt	Create	Connect	Control	Deliver	Think	Give	Top Three
<input type="checkbox"/>		=									

Select Export: ▾

Export

Show Completes

Show Incompletes

Clear

Help

Page: 1 ▾ ⏪ ⏩ 1 - 100 / 768 (1)

<input type="checkbox"/>	Name	Innov Score	Drive	Disrupt	Create	Connect	Control	Deliver	Think	Give	Top Three
<input type="checkbox"/>		=									

Congratulations! You have completed **Step 2:** communicating with the people you want to Profile and collecting the data. You're seeing that data coming into your dashboard in real time.

Now, on to step 3, analyzing the results!

Step 3

Analyze the results, and use the data to take action.

Now that you've collected some data, it's time to analyze your Profiler results and start using the data for decisions.

First, log in to your dashboard. You need to have at least a Basic subscription to access the dashboard. You will immediately notice that Profiler results are presented in a color-coded table.

The Swarm Innovation Profiler is color-coded to help you find talent for each Horizon of innovation:

- Scores in yellow are people who will excel at continuous improvement of the core business.
- People in dark green are great for extending the core of your business, often called Horizon 1 innovation.
- Scores in blue indicate people suited for developing new opportunities within the existing business model, Horizon 2 innovation.
- Scores in magenta are people suited for envisioning new business models that can disrupt your core, or Horizon 3 innovation.

	Name	Innov Score	Drive	Disrupt	Create	Connect	Control	Deliver	Think	Give
<input type="checkbox"/>										
<input type="checkbox"/>		97	97	93	100	96	92	91	83	90
<input type="checkbox"/>		96	97	97	96	95	90	88	96	95
<input type="checkbox"/>		93	95	96	93	89	76	91	83	100
<input type="checkbox"/>		92	97	93	97	92	90	97	79	97
<input type="checkbox"/>		92	91	93	92	84	84	88	94	97
<input type="checkbox"/>		89	94	93	93	87	72	91	93	81
<input type="checkbox"/>		87	89	93	89	85	72	82	87	91
<input type="checkbox"/>		87	87	84	91	91	79	96	87	90
<input type="checkbox"/>		87	100	84	91	82	90	96	87	86
<input type="checkbox"/>		84	92	81	86	94	72	96	73	69
<input type="checkbox"/>		82	87	81	84	83	72	82	84	74
<input type="checkbox"/>		82	87	71	89	84	83	85	76	93
<input type="checkbox"/>		82	89	65	88	76	81	93	52	91
<input type="checkbox"/>		80	87	84	96	58	72	69	73	54
<input type="checkbox"/>		79	89	56	82	86	68	79	75	66
<input type="checkbox"/>		78	72	72	94	67	72	88	67	61
<input type="checkbox"/>		78	91	68	69	88	84	82	64	87
<input type="checkbox"/>		77	81	72	80	70	84	85	55	81
<input type="checkbox"/>		77	87	65	88	64	82	78	45	85
<input type="checkbox"/>		77	91	56	91	89	35	88	79	100
<input type="checkbox"/>		75	92	72	86	88	72	54	64	87

You can search for specific combinations of skills to suit various tasks. For example, for a Disruptive Innovation project, hold the down arrows in the following columns:

Sort individuals by Disrupt + Create + Drive, in that order.

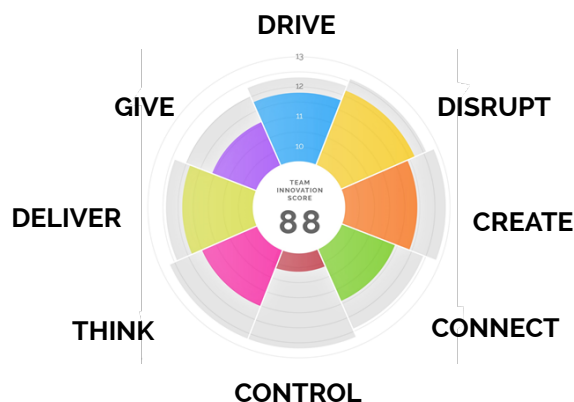
	Name	Innov Score	Drive	Disrupt	Create	Connect	Control	Deliver	Think	Give
<input type="checkbox"/>		96	100	97	100	97	84	100	90	100
<input type="checkbox"/>		94	100	84	100	89	67	100	96	95
<input type="checkbox"/>		96	100	97	98	97	72	96	98	100
<input type="checkbox"/>		93	100	96	98	80	72	96	97	100
<input type="checkbox"/>		90	100	81	96	89	64	88	79	100
<input type="checkbox"/>		89	100	78	95	91	79	91	90	90
<input type="checkbox"/>		90	100	96	93	85	84	91	90	90
<input type="checkbox"/>		88	100	81	93	95	67	100	67	95
<input type="checkbox"/>		87	100	84	91	82	90	96	87	86
<input type="checkbox"/>		94	97	98	100	82	67	93	97	69
<input type="checkbox"/>		97	97	93	100	96	92	91	83	90

Use Swarm data day-to-day, to improve your innovation results in many ways.

For example:

- To form high-powered brainstorming teams, select participants who score in at least the 50th percentile range overall (in blue or magenta) who also score high on Create,
- To identify innovation Champions, select employees who score in at least the 50th percentile range, who also score high on Connect
- To form stronger innovation teams, make sure the team has a good average innovation score, and coverage of all 8 innovation skills. Below is an example of a pretty strong team, that can be further bolstered in the areas of Control, Give and Connect:

AVERAGE INNOVATION SCORE



Team Score

Bench Mark

For further help on the dashboard, click on the “Help” button for a downloadable guide, including how to filter and export results.



Meanwhile, we congratulate you. You now know how to use the Swarm Innovation Profiler. You will soon have a fresh new view of your workforce's innovation talents.

Swarm Profiler scores are strongly correlated with actual business results from innovation. So be sure to use Swarm's powerful data to drive growth in your organization!