

PLAYBOOK

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# The AI Idea Campaign Playbook

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Align top-down AI strategy with bottom-up ideas to identify, prioritize, and scale high-impact use cases from those closest to the work.

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# Introduction

## The ROI Challenge Companies Are Experiencing with AI Projects

Despite billions in AI investment, only a fraction of initiatives deliver measurable ROI. Studies from McKinsey and BCG show that as few as 10–30% of AI use cases achieve expected financial outcomes, while Gartner estimates that up to 85% of AI projects fail due to unclear use cases and lack of alignment with business needs.

One of the drivers for the aforementioned unclear use cases and lack of alignment with business needs is that organizations are designing AI strategies from the top down, without asking the people who do the work every day for their input.

Rather than relying solely on IT or senior leadership to define an AI roadmap, organizations that engage employees across all levels, from the warehouse floor to the call center to the back office, consistently uncover higher-impact, faster-to-implement AI use cases.

## How Frontline Ideas Improve AI Strategy Alignment, Prioritization and ROI

Operations staff, customer-facing teams, and process owners are sitting on a goldmine of insight. They see inefficiencies that leadership never encounters. They understand workarounds, bottlenecks, and friction points that don't show up in dashboards. And increasingly, they're already experimenting with AI tools on their own, without organizational support or structure.

**What  
Management  
Sees**

**What Frontline  
Team Members  
Know**



- High level reports and presentations
- High level strategy and effectiveness on execution
- Direct feedback and line of sight from VP's and Directors
- Extra steps in a process that they do every day
- Individual customer complaints or specific breakdowns of customer experience in the customer journey
- Ways to make the customer experience delightful
- The actual culture based on micro interactions at the frontline daily
- Specific examples of waste
- Focused on more complex solutions that take a lot of resources to implement

By sourcing ideas and use cases directly from those closest to the work, organizations can identify use cases and ideas that are more feasible, will be adopted faster, and increase the probability of delivering a positive ROI. In fact, Deloitte research shows that organizations prioritizing business-driven AI use cases are 2–3x more likely to achieve meaningful financial impact.

## Who This Resource Is For

This resource was developed to help innovation leaders, HR professionals, and operational managers build and run structured AI innovation challenges with their employee base. The frameworks, statistics, and examples referenced throughout are drawn from primary research, published employee engagement studies, and real-world challenge program results.

The following chapters will walk you through practical steps and best practices based on Ideawake's 12+ years of experience working with customers large and small in conducting innovation challenges.

Whether you are launching your first challenge or looking to scale a recurring program, the framework here will help you build internal buy-in, design a compelling challenge statement, drive high engagement, and turn employee ideas into real business results.

# Section 1: The Business Case for Frontline Involvement

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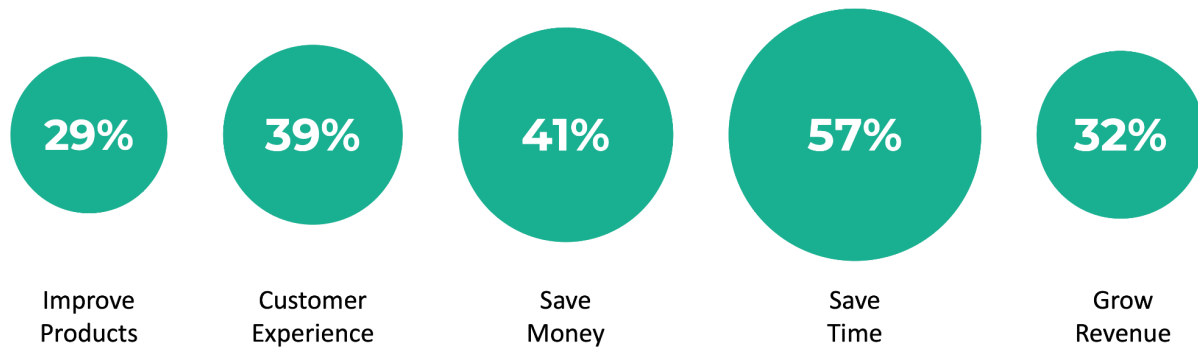
## The ROI of Engaging The Frontline in Ideation for AI Use Cases

While executive leadership plays a critical role in setting AI strategy, the most impactful use cases are often identified closer to day-to-day operations. Research from McKinsey & Company shows that 70% of AI's potential value comes from specific business functions, where inefficiencies and repetitive tasks are most visible.

Frontline employees operate within these workflows every day, giving them direct insight into where AI can reduce friction, save time, and improve outcomes. In fact, studies indicate that more than half of successful operational innovations originate at the frontline level, rather than from centralized strategy teams.

#### WHAT TYPES OF IDEAS DO EMPLOYEES HAVE?

Source - Ideawake's State of Employee Ideas Survey



By complementing top-down strategy with bottom-up input, organizations can identify higher-quality use cases that are both practical and immediately applicable. This alignment between strategy and execution is critical, because even the most advanced AI solutions fail to deliver value if they are not adopted within daily workflows.

Engaging frontline employees does not replace strategic direction, it strengthens it. It ensures that AI initiatives are grounded in real business needs, accelerating time-to-value and increasing the likelihood of measurable ROI.

### 5 Examples of AI Ideas From Frontline Staff Translating into Realized Value

Although some of these examples may seem simple and straightforward now, they represent opportunities that were hidden in plain sight. Each originated from frontline employees who understood where time was being lost and where AI could create immediate impact. When implemented, these ideas translated directly into measurable efficiency gains, cost savings, and productivity improvements.



#### Customer Support → AI Response Generation

Frontline customer support agents identified repetitive inquiry patterns and drove the adoption of AI-generated response suggestions, enabling automation of a large portion of customer interactions while maintaining service quality. This significantly reduced response times and operational workload while improving scalability without increasing headcount.

**ROI Impact:** Up to ~66% of support interactions automated and workload equivalent to ~700 agents offset, delivering millions in annual cost

savings.



### **Warehouse Operations → AI Picking Optimization**

Warehouse employees highlighted inefficiencies in manual picking routes, leading to AI-driven optimization models that reduce travel time and streamline fulfillment workflows. By addressing a daily operational friction point, these systems improved throughput and labor efficiency at scale.

**ROI Impact:** ~10–20% productivity improvement in fulfillment operations, reducing cost per package and increasing output without additional labor.



### **Banking Operations → AI Document Review**

Operations and compliance teams identified document review as a time-intensive bottleneck and drove the implementation of AI-based analysis solutions. These systems automate the review of contracts and financial documents, improving both speed and consistency.

**ROI Impact:** Reduction of manual review work from hundreds of thousands of hours to near-instant processing for certain document types, unlocking massive labor savings and faster decision cycles.



### **Finance Teams → AI Invoice Processing**

Accounts payable teams identified manual invoice processing as a key inefficiency and implemented AI to automate data extraction, validation, and routing. This reduced manual effort, accelerated processing cycles, and improved accuracy across high-volume workflows.

**ROI Impact:** 70–80% reduction in manual processing effort and materially lower cost per invoice, with faster cycle times and fewer errors.



### **Software Engineers → AI Coding Assistants**

Developers adopted AI coding assistants to reduce time spent on repetitive programming tasks and accelerate development workflows. This bottom-up adoption improved engineering velocity and enabled faster delivery of features and product enhancements.

**ROI Impact:** 55% faster task completion, driving significant gains in developer productivity and faster time-to-market for new functionality.



### Clinical Staff → AI Documentation Support

Nurses and clinicians identified documentation as a major administrative burden and helped drive AI-assisted note summarization solutions. These tools reduce time spent on charting, allowing clinicians to reallocate hours toward patient care and higher-value activities.

**ROI Impact:** ~1–2 hours saved per clinician per shift, translating to tens of thousands of labor hours annually and significant improvements in staff utilization and satisfaction.

## A Six-Step Framework for Building Your Business Case

When pitching an AI innovation challenge to leadership, vague promises about "unlocking innovation" will not close the deal. You need a structured business case that connects your initiative to the metrics leaders are already being measured on. Here is a six-step process to build it:

1. **Identify the scope and sponsors.** Define which departments, business units, or areas of the organization have goals that align with your AI challenge. Look for leaders who are under pressure to reduce costs, improve process efficiency, or accelerate digital adoption, these are your most natural sponsors.
2. **Understand what solutions are already being considered.** Your AI challenge is competing for time, budget, and attention. Know what other AI initiatives or vendor solutions leadership is weighing, and be ready to show why an employee-sourced approach is complementary or superior.
3. **Project the ROI in dollars and cents.** Estimate the value conservatively. For example: if your AI challenge helps reduce error rates by even 2-3%, what does that mean financially? If it surfaces one AI automation that saves 30 minutes per employee per week across a 500-person team, what is the annual labor savings? Even conservative ranges are more persuasive than qualitative benefits alone.
4. **Plan your resourcing realistically.** Outline what it will take to run the challenge, who will manage communications, who will evaluate ideas, and who will be responsible for implementing selected concepts. Starting lean with a focused pilot is far more persuasive than a grand proposal.
5. **Anticipate and address objections.** The most common objections are: "It's not the right time," "We have higher priorities," and "Our culture isn't ready." Build responses to each directly into your pitch before they come up.

6. **Deliver your pitch and set clear next steps.** Don't expect a "yes" in the first meeting. Your goal is to secure a follow-up meeting where you can address remaining objections and reach a decision. Leave every meeting with a specific next step on the calendar.

## Addressing Leadership Objections

Leadership teams will raise predictable objections. Here is how to respond to the most common ones in the context of AI:

- **"It's not the right time."** Reframe the timing: AI adoption is accelerating across every industry. Organizations that delay building internal AI intelligence risk falling behind. An innovation challenge is a low-cost, fast-to-run mechanism to start building your AI roadmap now, before competitors get further ahead.
- **"We don't have the resources to act on ideas."** Start small. Focus your first AI challenge on identifying quick-win AI automations and tool integrations that can be tested with minimal IT involvement. There is a significant difference between identifying a high-value AI use case (low cost) and building a custom AI solution (high cost). Let the challenge do the identification work cheaply.
- **"Our employees don't know enough about AI to contribute good ideas."** This is one of the most common misconceptions. Frontline employees don't need to be AI engineers to identify where AI could help them. They simply need to describe their biggest pain points. Your AI and technology teams can then evaluate feasibility. The best AI ideas often come from non-technical employees who know the problem space, not the technology space.
- **"Our culture isn't ready."** This objection usually signals that employees haven't been asked for their input before. An AI challenge is precisely the kind of initiative that begins to shift culture, but only if leadership visibly champions it.

## Section 2: Defining Your Audience, Process, and Stakeholders

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A well-run AI innovation challenge doesn't happen by accident. Before you go live, you need to make deliberate decisions about who you are inviting to participate, what process you will use to evaluate and act on ideas, and which stakeholders need to be involved at each stage.

### Defining Your Participant Audience

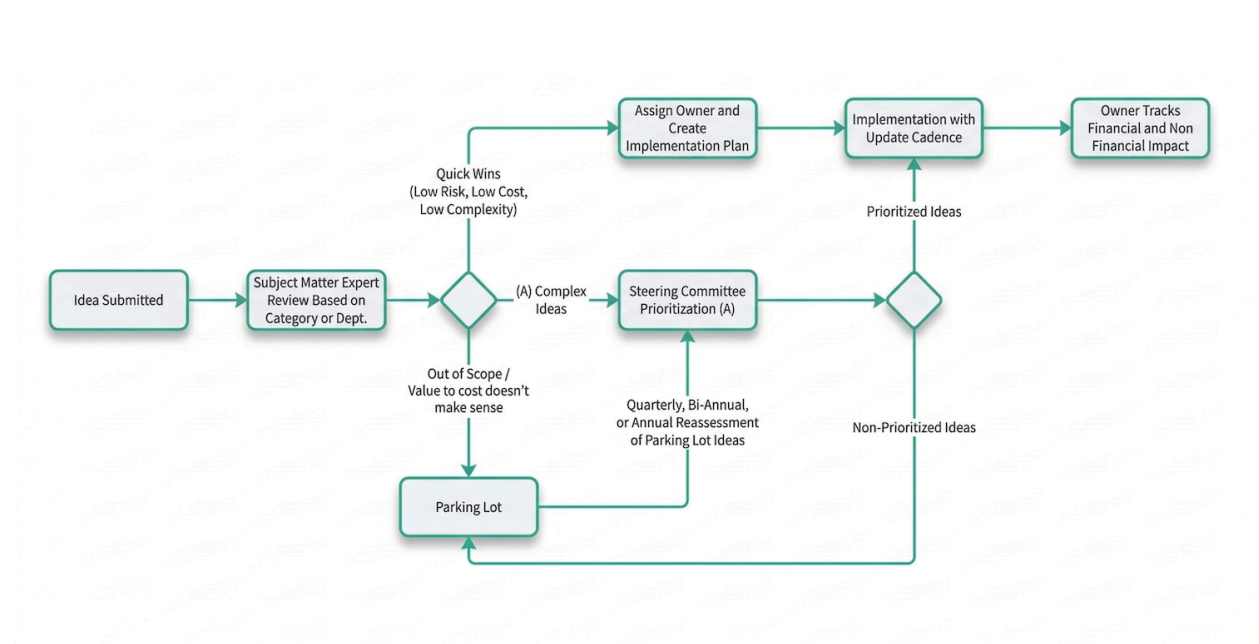
One of the first decisions you will make is who can submit ideas. For an AI innovation challenge, you should strongly consider opening participation broadly, across all levels and functions of the organization. Here is why:

- Frontline and operational employees interact directly with the tools, data, processes, and customers that AI can impact most. They often have the richest understanding of where time is wasted, errors occur, or information is lost.
- Mid-level managers see patterns across teams and can identify systemic inefficiencies that AI could address at scale.
- Subject matter experts in functions like finance, HR, legal, and supply chain often have ideas for AI applications that IT teams would never prioritize on their own.

That said, you also need to think about scope. If your organization is large, consider running your first AI challenge within a single business unit or department before scaling company-wide. A focused, well-run pilot builds credibility and demonstrates results faster than a diffuse company-wide launch.

## Structuring Your Workflow and Evaluation Process

Ideas submitted without a clear evaluation process tend to disappear, and employees who don't hear back about their ideas stop submitting them. According to Ideawake's State of Employee Ideas survey, one in five employees who had ideas stopped sharing because they never received feedback on a previous idea they shared.



For an AI innovation challenge, a clear evaluation process should answer these questions before you go live:

- **Who will review submitted ideas?** Consider forming a cross-functional review panel that includes both business leaders (who understand the problem value) and AI/IT representatives (who can assess feasibility).
- **What criteria will you use?** Recommended criteria for AI challenges include: business impact, implementation feasibility, data availability, estimated time to value, and alignment with organizational AI strategy.
- **How will you communicate decisions back to submitters?** Every idea should receive a status update, even if the answer is "not moving forward at this time and here's why."
- **What happens to winning ideas?** Define the pathway from selected idea to pilot before the challenge launches. Which team will own it? What budget is available for a small-scale test?

## Mapping Your Stakeholder Roles

Running a successful AI innovation challenge requires more than just a communications plan. You need clearly defined roles across your stakeholder map:

- **Executive Sponsor:** Provides visible, senior-level endorsement. Ideally sends the kick-off communication. Their involvement dramatically increases participation rates.
- **Program Manager:** Owns the day-to-day logistics of running the challenge, communications, platform management, timeline, and reporting.
- **Business Unit Partners:** The department or team whose challenge statement you are addressing. They co-own the evaluation process and are responsible for piloting selected ideas.
- **AI/Technology Subject Matter Experts:** Assesses the technical feasibility of submitted ideas and flags those with high automation potential.
- **Champion Network:** Frontline employees and managers who serve as boots-on-the-ground ambassadors for the challenge. More on this in Section 4.

## Section 3: Creating Challenge Statements That Align with Organizational Objectives

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The single most important factor in the quality of ideas you receive is the quality of the question you ask. A vague challenge statement like "Share your AI ideas" will produce vague, unfocused submissions. A well-crafted challenge statement focuses employee thinking, increases the relevance of submissions, and makes evaluation far easier.

### What Makes a Strong Challenge Statement

Effective AI challenge statements share three characteristics:

- They are tied to a specific organizational or departmental goal. Before writing your challenge statement, identify the business problem you are trying to solve. Are you trying to reduce manual data entry? Speed up customer response times? Improve quality control? Reduce scheduling inefficiencies? Your challenge statement should make the target outcome explicit.
- They define a clear scope. The more specific the scope, the more useful the ideas. "How might we use AI to reduce the time our customer service team spends on routine billing inquiries?" is far more actionable than "How can AI improve customer experience?"
- They invite employees to describe problems, not just solutions. Many employees don't think of themselves as AI experts, but they are experts on their own work. The best AI challenge statements give employees permission to describe pain points and workflow frustrations, not just propose technical solutions.

## The Simple Method for Creating Challenge Statements

Creating your challenge statement doesn't have to be complicated and isn't rocket science.



Step 1: Identify the short-term and long-term objectives of the business unit you are partnering with. What KPIs are they being measured on? What are their biggest operational pain points this quarter?

Step 2: Frame a challenge question that connects employee insight to those objectives. Use this structure:

*"How might we use AI to [achieve specific outcome] within [specific scope or process], in a way that [addresses a key constraint or improves a specific metric]?"*

Examples of strong AI challenge statements across industries:

- "Where in our daily workflows are you spending the most time on repetitive tasks that could potentially be automated? Describe the task and how often it occurs." (Operations / Any industry)
- "How might we use AI tools to reduce the time nurses spend on documentation so they can spend more time with patients?" (Healthcare)
- "Where do you see AI having the biggest potential to reduce errors or rework in our production process?" (Manufacturing)
- "What customer questions or requests do you handle repeatedly that you believe AI could help answer faster or more consistently?" (Customer Service / Retail)
- "Which of your current reporting or data analysis tasks takes the most time, and what decisions does that data inform?" (Finance / Analytics)

### Aligning Challenge Statements with Your AI Strategy

If your organization has a broader AI strategy or roadmap already in development, use your innovation challenge to validate and stress-test it from the ground up. Ask employees whether the AI capabilities being explored by leadership actually address the problems they experience day-to-day. The gap between top-down AI roadmaps and frontline reality is often significant, and expensive.

It is also worth running multiple challenge statements simultaneously or sequentially across different business units. This allows you to build a portfolio of AI use cases organized by function, urgency, and feasibility, a far more actionable output than a generic list of AI ideas.

## Section 4: Promoting Your Challenge to Achieve a 60–80% Engagement Rate

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The difference between a successful AI innovation challenge and a disappointing one is often not the quality of the challenge statement, it's the quality of the promotion. Organizations that achieve 60–80% employee engagement rates do not get there by sending a single email. They build a multi-channel promotion strategy around the challenge before, during, and after it runs.

### Develop a Dedicated Communication Plan

Your communication plan should begin at least two weeks before the challenge goes live and continue throughout the submission window. Key components include:

- **Pre-launch announcement:** Ideally signed and sent by the highest-ranking executive you can get to sponsor the challenge. A message from the CEO or divisional VP has a measurably higher open and click-through rate than a message from the innovation or HR team alone.
- **Intranet and internal channel promotion:** Feature the challenge prominently wherever employees already go, your intranet homepage, internal newsletters, Teams or Slack channels, and digital signage.
- **Manager briefings:** Equip frontline managers with talking points and a simple ask: "Bring up the challenge in your next team meeting and encourage your team to submit at least one idea." Managers are the single most influential voice for most frontline employees.
- **Weekly reminders:** During the active submission period, send at least one reminder per week. Include examples of ideas already submitted (where the program is open) or reinforce the types of ideas being sought.

## Brand Your Challenge for Recognition and Engagement

Giving your AI innovation challenge its own identity, a name, a visual brand, and a simple tagline, meaningfully increases participation. Names like "AI Ideas Lab," "FutureForward Ideas," or "SmartWork Challenge" give employees a mental hook to remember the program.

Keep all communications to the rule of three: three key messages, three ways to participate, three reasons to submit an idea. Complexity kills engagement.

One important note on language: avoid overusing the word "innovation." Research on employee engagement programs consistently shows that employees are more likely to engage when asked for their "ideas" or "suggestions" rather than being invited to "innovate." Most people don't see themselves as innovators, but nearly everyone has a suggestion.

## Build and Activate a Champion Network

The most powerful driver of high engagement is a champion network: a group of employees at different levels and locations who agree to promote the challenge, seed initial idea submissions, and encourage their colleagues to participate.

Champion networks are effective for several reasons:

- **They create early momentum.** When the challenge launches with zero submissions, employees are reluctant to be first. Champions seed the platform with initial ideas, lowering the social barrier to participation.
- **They provide local credibility.** A message from a peer or a direct supervisor carries far more weight for most frontline employees than a communication from a central innovation team.

- **They extend your reach without requiring additional budget.** Champions do the promotional heavy lifting at the department and team level.

Segment your champion network by department, location, or both. Give champions a simple brief: promote the challenge in their team meetings, submit at least one idea themselves, and comment or vote on ideas from colleagues. Approximately 25% of organizations that run challenges build effective champion networks, but those that do consistently see higher submission rates and better idea quality.

### Communicate Before, During, AND After

One of the most common and costly mistakes organizations make is going silent after the submission window closes. Employees want to know what happened to their ideas. A lack of post-challenge communication is the number one reason employees disengage from future programs, and it undermines the cultural value of running the challenge in the first place.

Post-challenge communication should include:

- A summary of how many ideas were submitted and how many are moving forward to evaluation or pilot.
- Personalized or category-level feedback to submitters explaining why their idea is or is not moving forward.
- Recognition for participants and contributors, even those whose ideas weren't selected.
- Progress updates on ideas that are being piloted or implemented.

## Section 5: Evaluating and Selecting Tools to Manage Your Challenge

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Choosing the right platform or tool to manage your AI innovation challenge has a meaningful impact on the quality of your data, the efficiency of your process, and the experience you create for participants.

### Starting Simple: Low-Tech Options for Small Groups

If you are running a pilot with fewer than 50 participants and have limited budget, you can launch a basic AI innovation challenge using tools your organization already has:

- Microsoft Forms or Google Forms for idea submission. These work well for a single-round submission process but have limited functionality for collaboration, voting, or status tracking.
- Microsoft Teams or Slack channels for small, focused groups. These can work for informal brainstorming but become difficult to manage at scale.

The primary limitation of these tools is that they require significant manual work to organize submissions, communicate status updates, and report on results. They are appropriate for a first pilot, but not for a recurring or company-wide program.

## When to Invest in a Dedicated Platform

Once you move beyond 50 participants or plan to run recurring challenges, a dedicated innovation management platform dramatically improves outcomes. Look for platforms that offer:

- Structured idea submission with configurable fields relevant to AI challenges (e.g., use case description, affected process, estimated time savings, data requirements).
- Collaboration features: the ability for employees to comment on, build upon, and vote for each other's ideas. Social validation of ideas improves quality and engagement.
- Workflow management: the ability to move ideas through defined stages (submitted, under review, selected for pilot, implemented) and communicate status automatically to submitters.
- Reporting and analytics: visibility into submission volume, engagement rates, top-rated ideas, and implementation outcomes.
- Integration with existing tools: ideally, the platform integrates with your intranet, HR systems, or communication tools so employees don't have to create yet another login.

## Key Questions to Ask When Evaluating Platforms

When assessing innovation management tools for your AI challenge, ask:

- How easy is it for a frontline employee to submit an idea on a mobile device? Accessibility matters enormously for non-desk workers.
- Can we configure the submission form to capture AI-specific information such as process affected, data availability, and estimated frequency of the problem?
- How does the platform support the post-challenge communication and feedback process?

- What does implementation and ongoing support look like, and what does IT involvement require?
- Can we run multiple simultaneous challenges across different departments or business units?

## Evaluating AI Tools Within the Challenge Itself

There is an interesting opportunity within an AI innovation challenge that many organizations miss: using the challenge itself as a way to learn which AI tools employees are already using or experimenting with on their own.

A growing share of frontline employees are independently using AI tools like ChatGPT, Copilot, and other generative AI assistants to do their jobs faster. An AI innovation challenge can include questions that surface this shadow AI usage, giving your organization valuable intelligence about where AI is already taking hold, what risks may exist from ungoverned AI use, and which tools merit official evaluation and investment.

# Section 6: Best Practices and Common Obstacles

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Organizations that achieve sustained results over time build their programs around a set of core best practices, and they learn to anticipate the obstacles that derail most first attempts.

## Best Practices for Running AI Innovation Challenges

### **Keep it time-based and targeted.**

Time-bound challenges with a clear focus outperform always-open suggestion boxes. A defined submission window creates urgency, simplifies promotion, and enables a structured evaluation process with a manageable volume of ideas. Aim for a two-to-four week submission window.

### **Start with quick wins.**

For your first challenge, prioritize ideas that are high-impact and low-complexity. Quick wins—like simple automations, prompt templates, or chatbots—build confidence and help justify expanding future challenges.

### **Make it cross-functional.**

Many of the best AI use cases emerge across departments, where one team's problem creates friction for another. Encouraging cross-functional participation and visibility allows employees to build on each other's ideas and uncover broader opportunities.

### **Involve implementers in evaluation.**

A common failure point is the gap between idea selection and execution. If implementation teams aren't involved early, they're less likely to follow through. Include at least one implementation stakeholder in the evaluation process.

### **Recognize participation, not just winners.**

Employees value having a voice as much as having their idea selected. Recognition—through shout-outs, newsletters, or leadership acknowledgment—drives sustained engagement more effectively than rewarding only a few winners.

### **Tie idea submission to performance over time.**

Leading programs embed idea contribution into performance reviews and scorecards. When submitting and advancing ideas becomes part of the job, participation and quality increase. While this is a long-term goal, starting early makes the program easier to sustain.

## **Common Obstacles and How to Overcome Them**

### **Low engagement after a strong launch.**

Initial challenges often see higher engagement than follow-ups—unless results are clearly communicated. If employees submit ideas and hear nothing back, they won't participate again. Prevent this with strong post-challenge communication and at least one visible implementation story before the next launch.

### **Ideas that are hard to act on.**

Vague challenge statements lead to vague ideas. If submissions are too high-level, refine your prompt and add structured fields requiring the problem, frequency, and a simple hypothesis for how AI could help.

### **IT resource constraints.**

Technology teams are often stretched thin, making early involvement difficult. Design your first challenge to identify and validate use cases without requiring IT implementation, then use results to build a business case. Position outputs as a prioritized AI backlog, not an upfront resource ask.

### **Keeping complexity low for participants.**

Every extra field, step, or login reduces participation. Keep submission friction low and simple—additional detail can be gathered later for high-potential ideas.

### **The “ideas go into a black hole” problem.**

This is the most damaging failure mode. Ideas must be tracked, evaluated, and communicated

transparently. If they disappear after submission, trust collapses. Invest as much in post-submission communication as you do in promotion.

*"95% of ideas submitted won't be implemented. But employees don't care as much about whether their idea was selected as they care about whether they had a perceived voice and received recognition for sharing.", Ideawake State of Employee Ideas Survey*

## Conclusion: Your Employees Are Your AI Advantage

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The organizations that will capture the most value from AI are not necessarily the ones with the biggest data science teams or the largest AI budgets. They are the ones that are best at asking the right people the right questions, and acting on what they hear.

Your frontline employees are already seeing where AI could help. They are watching repetitive tasks consume hours that could be reclaimed. They are navigating workarounds that a well-designed AI tool could eliminate. Many of them are already using AI tools on their own, without organizational support.

An AI innovation challenge is your mechanism to bring that distributed intelligence into a structured, actionable process, one that benefits the employee who shares an idea, the team that gets a better workflow, and the organization that builds a competitive AI advantage grounded in real operational insight.

Start with a clear business case. Design a focused challenge statement. Promote it with intention. Listen actively. Act visibly. And communicate relentlessly about what you heard and what you did with it. The most valuable AI ideas in your organization are already there. You just need to ask.

## About Ideawake

Ideawake is a shockingly simple idea and innovation management platform that helps organizations double the ROI they're achieving from crowdsourcing the ideas of employees, customers, and partners while cutting the time it takes to manage ideas in half.

Ideawake is trusted by 100 employee startups to leading Fortune 500 companies to enable a culture of innovation, drive financial results, and increase employee engagement at scale. Our industry leading idea management platform powers innovation programs in 39 countries and over 185 cities. Learn more about us by visiting <https://ideawake.com>.

