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**Scouting Worksheet**

The goal of this worksheet is to help you think through some of the key questions, participants, risks, and indicators of success when you are setting up or seeking to improve a scouting operation. We’ve left some fields blank because they will differ from company to company. And you may feel the key questions and risks are not comprehensive — there may be others you’d like to add, or some you’d delete because they’re not relevant to your environment.

This worksheet is a component of our 2017 research report, “[Best Practices: Scouting Trends & Emerging Tech](https://www.innovationleader.com/tech-scouting-report/).” Feel free to share it inside your organization or with peers, but kindly don’t post it or share online.

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| **Activity** | **Key Questions** | **Who Will Be Involved?** | **Risks** | **Indicators of Success** |
| Aligning with strategy and setting boundaries | • What is the overall corporate strategy, and how can scouting deliver value to it?• What is “in scope” and “out of scope,” in terms of technology areas, stage of company, geography, etc.?• Are there mechanisms for finding “weak signals” that may be relevant to the company, though not directly aligned with the strategies of today? |  | • Lack of alignment, misalignment, strategy shifts, executive shuffles• If scouting is tied too tightly to the current strategy, are you missing weak signals that may be important in the future? |  |
| Operating the radar | • Where will budget/resources come from?• How will we communicate with business units and functions to understand their needs and interests?• What software or databases will we use? • How will we determine which events/collaborations/scouting tools are producing value, and which aren’t? |  | • Insufficient input from business units about their needs and interests• Duplicating effort because of poor coordination• Missing major trends/technologies because of resource constraints or “blind spots”  |  |
| Communicating what we see | • How widely should you communicate the “signal” from your scouting activity? To everyone? Key constituencies only?• What software supports this?• Are there ways for others outside of the “official” scouting team to contribute what they are seeing, comment on trends/technologies, rank them in importance, etc.? |  | • Disparate data silos make it hard to communicate or give access to a single vision of trends/technologies• More time spent operating radar than communicating results• Communication only goes up in the organization(to senior leaders), not to lowerl-level managers and employees who might benefit from access |  |
| Running tests and experiments | • What systems and processes are in place to support testing new technologies with employees, customers, suppliers, etc.?• How will you source willing testers?• How will you gather and share data about what works and what doesn’t?  |  | • Failures casts too big a shadow over the scouting team/activity• Organizational barriers make it impossible to run quick and inexpensive tests• Small successes viewed as “small potatoes”; questions about whether this can scale |  |
| Helping the business take action on what works | • Does the business feel invested enough in the scouting and testing activity that has taken place so far to want to help roll things out?• What are the pathways and processes to help things move from pilot phase into larger-scale commercialization? |  | • “Not invented here” syndrome• Endless questions or data gathering exercises about whether a new technology or process merits abandoning the existing one• Fear of change |  |

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