Delivery 4.1

Draft demonstrator framework

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Contents

Introduction

Understanding this document

Welcome to OPENNEXT Demonstrator Framework main Guide. This document aims at providing a holistic overview of the demonstrator framework,its key components together with a navigation map to guarantee a smooth, fruitful collaboration between Small Medium-sized Enterprises (SMEs) and Digital Fabrication Labs (FabLabs).

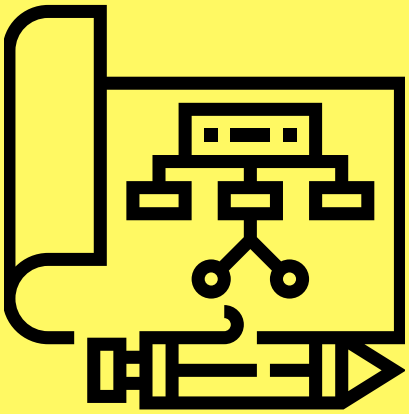
This document is meant to be a welcome introduction to the OPENNEXT open-source collaboration journey. A journey that allows both SMEs and Fablabs to explore new horizons of possible strategic collaborations ranging from co-Design to open /distributed manufacturing. On those grounds, we recommend it to be your first read.

Context

Tackling the emerging challenges of industrial product creation being expensive, unsustainable, and highly non-customer centric, a team of nineteen partners of Europe’s most prestigious universities, research institutions, and specialized organizations have joined each other in OPENNEXT.

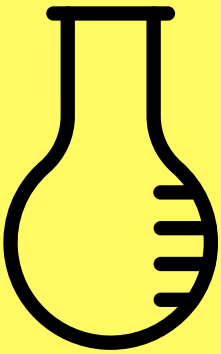
OPENNEXT is a Horizon 2020 research and innovation program funded by the European Commission under Grant Agreement No. 869984. The project envisions a strategic company community collaboration where a fundamental change can be established in how products can be created, produced, and distributed in the future.

Target audience



SMEs

SMEs aiming at gaining competitive advantage through a parallel innovation of both their product creation processes and business model based on open source principles and strategic collaborations with corresponding user communities and/or other industrial partners (SMEs, Fablabs, etc)



Makerspaces

FabLabs / Makerspaces: known for their strong enthusiasm as open source maker culture incubators, Fablabs combines talent, experience and facilities. By Joining OPENNEXT, FabLabs can expand their current service offering, attracting SMEs to not only facilitate a collaborative journey but to open the doors to build a wide community joining this collaboration.

Overview

The Demonstrator framework

[Work in progress]

Components

The OPENNEXT Demonstrator Framework is made up of three main components:

1 – Main Guide
(This document)

Provides the OPENNXT collaboration journey participant (SME or a Lab) with an overall higher-level view of the demonstrator framework to understand the strategic aim behind the journey. The main guide assist the potential participants in the decision-making process to take part and defines the road map and the navigation routes.

2 – The primer checklists
(Appendix A+B)

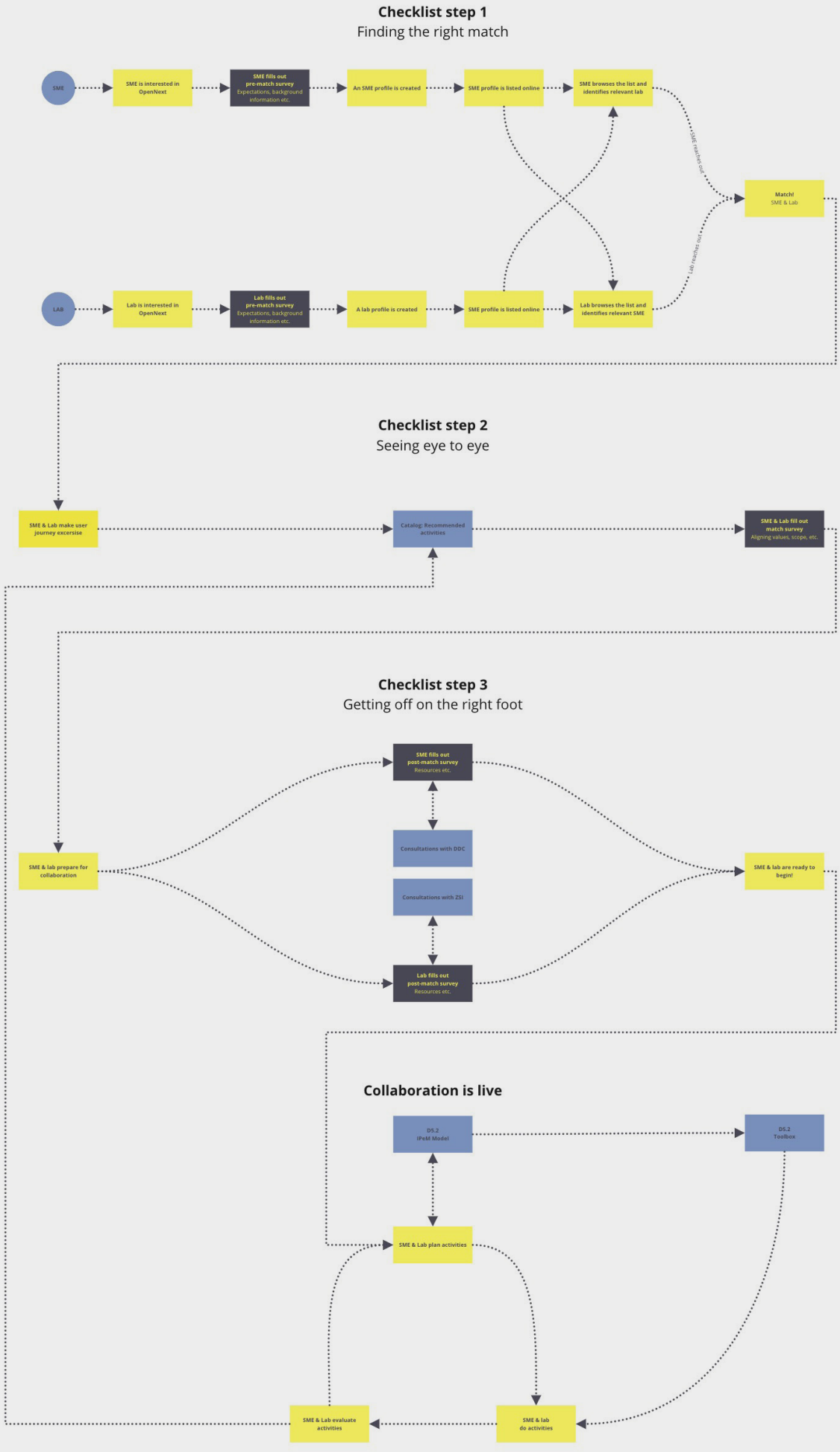
Aims at making sure both parties (SME and Lab) can prepare themselves effectively, both independently and together. A three-stage process which includes:

1. "***Finding the right match***" (individual checklists for SME and Lab)
2. "***Seeing eye to eye***" (joint deadline for SME and Lab together)
3. "***Getting off on the right foot***" (individual checklists for SME and Lab)

The document is made up of two main components; the checklist guide (appendix A, to be read first) and the actual checklists (appendix B), which are designed to be filled by SMEs and Labs both solo and together which fit each of the above three stages process requirements.

3 – Catalog of recommended activities & collaboration journey exercise
(Appendix C)

Aims at supporting the SME/lab teams in initiating their collaboration by kickstarting their planning process. The catalog of recommended activities contains a collection of suggestions from participating SMEs and labs and can be used in combination with the collaboration journey exercise to explore potential "journeys" through OPENNEXT.


Checklist step 1
Finding the right match
SME
SME is interested in OpenNext
SME fills out pre-match survey
Expectations, background information etc.
An SME profile is created
SME profile is listed online
SME browses the list and identifies relevant lab
SME reaches out
Match!
SME & Lab
LAB
Lab is interested in OpenNext
Lab fills out pre-match survey
Expectations, background information etc.
A lab profile is created
SME profile is listed online
Lab browses the list and identifies relevant SME
Lab reaches out
Checklist step 2
Seeing eye to eye
SME & Lab make user journey excersise
Catalog: Recommended activities
SME & Lab fill out match survey
Aligning values, scope, etc.
Checklist step 3
Getting off on the right foot
SME fills out post-match survey
Resources etc.
Consultations with DDC
Consultations with ZSI
Lab fills out post-match survey
Resources etc.
SME & lab prepare for collaboration
SME & lab are ready to begin!
Collaboration is live
D5.2 IPeM Model
D5.2 Toolbox
SME & Lab plan activities
SME & Lab evaluate activities
SME & lab do activities

Two types of collaborations

Basic collaboration (8 weeks)

[Work in progress]

Extended collaboration (24 weeks)

[Work in progress]

Help

Peer to peer support

[Work in progress]

Consultations

[Work in progress]

Future inclusions

Examples / cases

After the OPENNEXT pilots are finalized, future editions of this document will include examples/ cases.

[Work in progress]

Appendix A

SMEs and Makerspaces
Primer checklist guide

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Introduction

Welcome to the **OPENNEXT Primer Checklists** for Labs and SMEs, which aims to make sure the both parties can prepare themselves more effectively, both independently and together.

This document is an obligatory read for any party (SME or Lab) entering into OPENNEXT, and must be completed as as the first action in the OPENNEXT Demonstrator Framework, after reading the **OPENNEXT Demonstrator Framework Main Guide.**

Structure

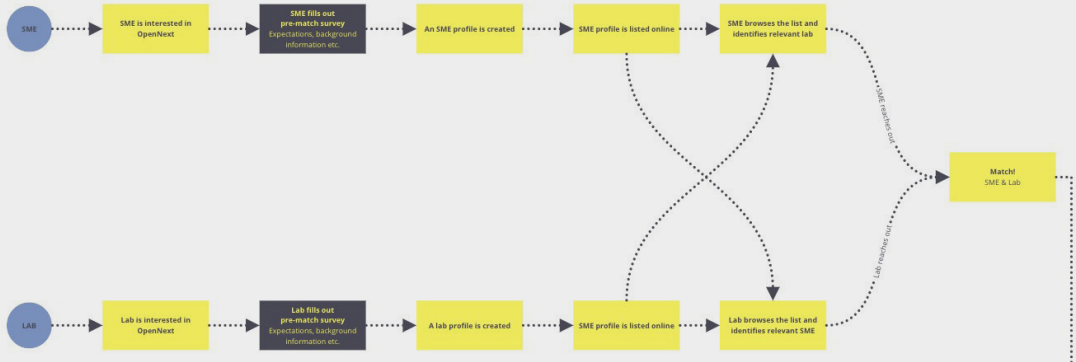
The document is made up of two main components: A guide to the Checklists, and the actual Checklists to be found in the appendix section in the end.

The idea is that first you read the guide, and then you fill out the checklists. Some of these checklists are to be filled out independently, and some you will fill out together, as visualized on the following page.

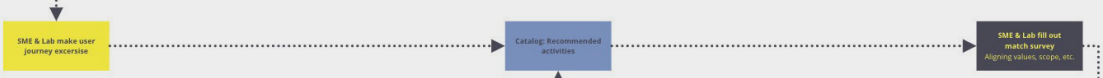
The filling of the checklists has 3 stages:

1. **“Finding the right match”** (individual checklists for SMEs and Labs)
2. **“Seeing eye to eye”** (joint checklist SMEs and Lab together)
3. **“Getting off on the right foot”** (individual checklists for SME and Lab)

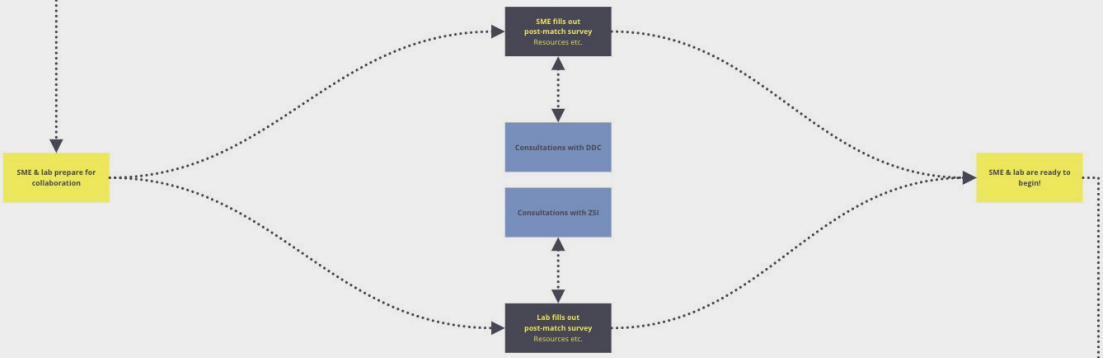
Checklist step 1
Finding the right match



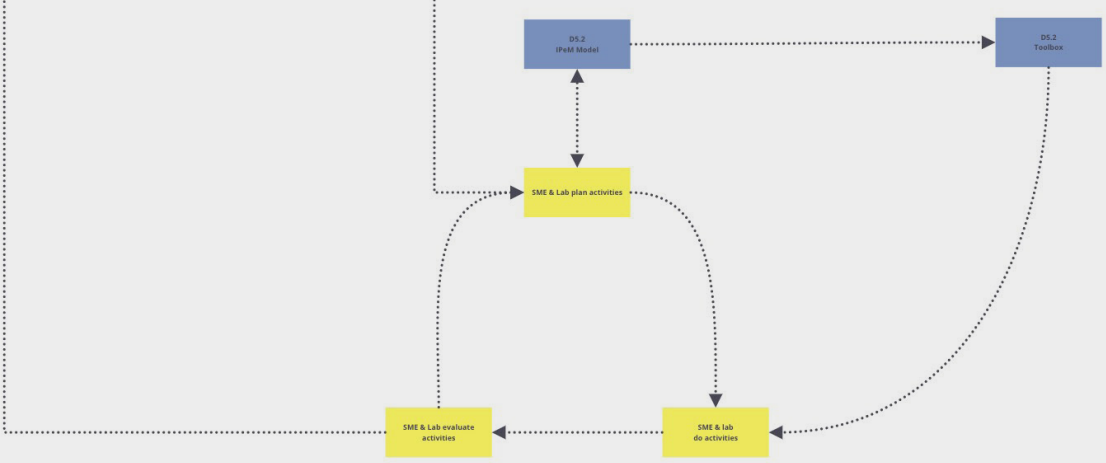
Checklist step 2
Seeing eye to eye



Checklist step 3
Getting off on the right foot



Collaboration is live



Context

Today's industrial product creation is expensive, risky and unsustainable. At the same time, the process is highly inaccessible to consumers who have very little input in the design and distribution of the finished product.

Presently, SMEs and maker communities across Europe are coming together to fundamentally change the way we create, produce, and distribute products.

By sharing ideas and knowledge openly on digital platforms, the project of 19 partners in EU-countries called OPENNEXT, will establish new collaborations between companies and consumers. The industries in focus include eco-friendly mobility, consumer electronics, and built-to-order furniture.

OPENNEXT seeks to empower both companies and consumers to co-design and co-manufacture products based on new mindsets, new business models, and new collaborative software solutions.

For further reading about OPENNEXT, go here.

Participants

OPENNEXT combines the effort of three different types of stakeholders:

1. **SMEs**, who manufacture physical products (hardware, in the broadest definition of the word) and seek to innovate their product development and manufacturing towards a new business model based on open source principles and empowerment of users towards becoming co-creators. SMEs will be invited to participate in three rounds: Pilots (6 SMEs, partners in the CE H2020-funded OPENNEXT program), demonstrators (12 SMEs, to be recruited as part of the project) and finally in an "open market" version of the demonstrator to be offered in Labs arounnd the world on market terms after the CE H2020-funded project ends.
2. **Labs**, as creative hubs for open source maker culture, who will act as experts on community building and facilitators of the learning journey for the SMEs, while at the same time developing the OPENNEXT Demonstrator Framework as a business offering to be offered after the conclusion of EC H2020-funded project.
3. **Research partners**, who throughout the EC H2020-funded project period will conduct research to help build the OPENNEXT Demonstrator Framework as well as derive and publish learnings from the pilots and demonstrators.

Timeline

The completion of the Checklists is estimated to take between 2-4 weeks (pending SME and Lab availability in meeting for the work related to the joint checklist). After this the actual OPENNEXT user journey (to be tested first in the pilots) is expected to take 8-16 weeks. This duration may be changed based on the learnings in the pilots before the OPENNEXT project moves on to the next iteration phase (ie. the demonstrator-stage with 12 new SMEs).

Outcome

SMEs and Labs, upon having filled out the Checklist, will have a firm understanding of the following:

1. Whether OPENNEXT is a good match for them - or not.
2. What their concrete purpose for initiating an OPENNEXT process together is.
3. What needs they have and seek to fill during OPENNEXT.
4. What obligations that come with being part of OPENNEXT and what their role is.
5. What resources are needed from their side in order to take part in OPENNEXT.

Step 1

Finding The Right Match
Individual checklists for SMEs and labs

1A – For SMEs

Understanding OPENNEXT & matching expectations

Before embarking on the OPENNEXT journey, we want to make sure that you and your company are as prepared as possible for what is to come. We want to make sure that you fully understand the OPENNEXT project, and that your expectations are aligned with the expectations of the lab you will be collaborating with.

This checklist document will make sure that you know exactly what it is that you're signing up for if you join OPENNEXT: It will cover what OPENNEXT can – and cannot - help you with, as well as ensure that you are prepared for the implications of peer-to-peer based learning. Another way to say that learning in OPENNEXT is a matter of "give and take."

Getting familiar with your specific role

You should have a clear understanding of your specific role as SME before you begin. That means being familiar with (and equipped for) what is required of you as an SME in OPENNEXT, what your specific responsibilities are, and where they overlap with the roles and responsibilities of the lab you will be collaborating with.

Understanding what open source means

Before starting we want to make sure you and your team have a thorough understanding of what open source means. In this section you will be provided with a basic explanation where you will be introduced to open source hardware. You are also provided with a selection of informative links.

This section should also give you clarity about whether open source production holds potential for your company.

Getting your leadership on board

Having leadership (decision makers) from your company sign off on your OPENNEXT engagement is crucial, since the outcome of the engagement will likely challenge existing business practice. It is recommended to always have sign-off from someone in the top management of the company, and ideally also someone senior from product development and/or innovation practice.

This part of the checklist will prepare your company leadership for the OPENNEXT engagement. You should consider whether the right decision makers from your company are on board, that they know their role throughout the engagement, and that everything is in alignment with your company strategy.

Set your purpose for taking part and Uncover your needs

This part will help you clarify your purpose for taking part in OPENNEXT, and help you uncover your specific needs. Both might change along the way, but having clarity at the outset is critical for a smooth experience. The checklist will help you make sure you know what you want to achieve, whether it is strategy, product development, or a new business model, and what you need to get there.

[The questions in this part of the Checklist will be all those developed in the T4.5 Impact Assessment materials]

Setting your team

Before the outset it is important to have composed the right team for your OPENNEXT journey.

Composing the best team could mean combining people from different areas and levels. A cross-disciplinary team with a strong anchoring with the relevant decision makers is optimal. An example could be a team with representatives from leadership, innovation, production, etc, according to the specific resources in your company.

Part of this is also to figure out who will lead your team: The best leaders for your team will be those who sense a real opportunity for growth and learning. OPENNEXT can be both incredibly rewarding and quite demanding, and we recommend that the people at the frontlines of your team are not only prepared but excited for what they’re getting into. Also, proactivity goes a long way when you’re

set in an environment brimming with the available knowledge from Labs, mentors and fellow SMEs.

1B – for Labs

Understanding OPENNEXT & matching expectations

Before embarking on the OPENNEXT journey, we want to make sure that your lab is as prepared as possible for what is to come. We want to make sure that you fully understand the OPENNEXT project, and that your expectations are aligned with the expectations of the SME you will be collaborating with.

In this checklist/survey we will make sure that you know exactly what it is that you are about to do if you join OPENNEXT.

It will cover what OPENNEXT can – and cannot help you with, as well as ensure that you are prepared for the implications of peer based learning - that means learning by ”give and take”.

Getting familiar with your role

The survey will ensure that your specific role as lab is clear to you before you begin. That means being familiar with, and equipped for what is required of you as lab in OPENNEXT, what your specific responsibilities are, and where these overlap with the roles and responsibilities of the SME you will be collaborating with.

Understanding what open source means

Before starting we want to make sure you and your lab have a thorough understanding of what open source means. In this section you will be provided with a basic explanation where you will be introduced to open source hardware. You are also provided with a selection of informative links.

This section should also provide you clarity about whether open source production holds potential for your lab.

Getting familiar with the OPENNEXT resources

Before you begin your journey and collaboration with the SME, we want to make sure that you are familiar with all the different resources OPENNEXT provides for you in order to create your shared journey. These include the Recommended Activities Catalogue, the Collaboration Journeys tool and this checklist (etc). This section will make sure that you understand all of them and what they require of you as facilitator. It is also important that you are certain that you can facilitate all the modules.

Facilities

As lab you are the one providing the physical facilities needed to carry out the collaboration. Therefore it is crucial that you have all the proper facilities ready and available. These include the right physical space, digital tools, an active community, and more.

Here are two lists: One with must-haves facilities (ie. meeting rooms, event space for community meetups, simple prototyping technology, etc.) and one with nice-to-haves (ie. advanced digital fabrication technology, etc.).

- [Link must-have]
- [Link nice-to-have]

Read through them to get an overview of what facilities you must have, and which facilities you may lack and will need to gain access to in other ways than having them in your Lab.

Please document in the survey which facilities you have.

Preparing your community

Is your community aware of the upcoming interactions with SMEs? Your community is an important part of the OPENNEXT project, and it is important that they are aware of the upcoming opportunity. Do some of them see how this is an opportunity for mutual learning/ benefit?

Setting your team

Leading an OPENNEXT journey for an SME, especially the first time, requires specific competences on your Lab OPENNEXT team. Some of these will be basic, ie.:

- **Project lead** (main contact point for the SME)
- **Community connector** (someone to connect the SME with the Lab community)
- **Technological lead** (someone with a certain degree of technical expertise and knowledge of the industry domain of the SME)

In addition, other competencies that might be needed (based on specific needs from the SME, for instance related to industry-specific needs) will be mapped through the completion of these checklists. The Lab can then in collaboration with the SME see whether additional ad-hoc staffing is necessary and whether candidates for these roles can be found in the community surrounding the Lab or whether someone external should be approached.

Before the outset it is important to have composed the right team for each OPENNEXT journey.

How will you learn

As a Lab engaging in OPENNEXT, it is important to be able to collect learnings and iterate the OPENNEXT offering based on these learnings in order to continually improve the service and increase the competence level of the OPENNEXT team.

Lots of new insights, contacts and opportunities will be created, so having a system for how to capture them, take action on them and improve your OPENNEXT system is very important.

Prepare for building your visual collaboration journey

This is the last part (of the first part) of your individual checklist as Lab. The next part of the checklist you and the SME will fill out together, but with you as the driving force (as facilitator), see below. One of the activities you will be doing to help you see eye to eye with the SME (align your values, goals and work methods) is a visualisation of your journey together.

You as Lab is responsible for the facilitation of this exercise. You can find a guide in the “Recommended Activity Catalog”. Make sure you have read and orientated yourselves in the catalog guide. You will also need to print the journey map and the Recommended Activities cards, as presented in the guide. Understand each other: SME, meet the Lab. Lab, meet the SME.

You (lab and SME) have both completed the first step towards getting started with OPENNEXT. The previous part set you up to find your right match, and you have found each other – congratulations! Now is the time for the two of you to meet.

This part of the checklist is collaborative, meaning you will go through it together. We want to make sure that you see eye to eye on critical aspects of your budding collaboration.

We suggest you see your answers as a “social contract.” It’s non-binding but it’s important that you understand that from here on out you have an obligation to each other. Answering the questions together ensures that you agree on a few crucial issues. This will make your collaboration go as smooth and problem-free as possible.

2 – for both SME and Lab

Matching expectations

This first part will make sure you have a mutual understanding of what you are going to be doing together. You have already reflected on what OPENNEXT can – and cannot – help you with, and you have also been prepared for peer-to-peer based learning.

By filling in this section you will make sure that you both share the same understanding.

Getting familiar with each others needs (SME needs in particular)

In this section you are going to make sure you are both familiar with each other's needs. It is particularly important that you clearly understand the needs of the SME. First you will go through the needs assessment filled in by the SME to gain understanding, and later you will fill in the checklist to make sure you did not miss any important points.

Do you share an understanding of what open source means

It is not given that there is only one way to understand open source and the implication for how you will be using it. Therefore you will be discussing and determining what degree of openness is possible - in the collaboration, in the SME, and in the community.

Setting the right attitude

Now is the time to set the right attitude. You will determine your common attitudes towards: open source collaboration, community creation and interaction, stepping into uncertainty and "the new", and radical learning.

Setting a shared goal

From here on out things are going to get more specific. Now you will be formulating a specific goal for the collaboration between you (Lab and SME).

You should also decide what criteria you will set to determine your success rate, and what is the minimum you want to achieve to consider the outcome a success.

Work mode, flow, timing

The logistics of how and when you will work should be determined now. In this section you will come to an agreement together by determining when you meet and how often, but also what will take place digitally and what will take place physically.

Communication (internal)

Set an agreement about communication. You will discuss and agree on issues regarding how you will communicate with each other, what is an appropriate response time, etc.

Communication (external)

You should also agree on how you will communicate with the world. How will you tell the world about your collaboration, your goal, your learnings?

You should also consider whether there is anything that either of the parties would not like to share with the world.

Make sure you can finish

Last but not least: Make an agreement with each other, that you are committed to finishing the project. The other participants are dependent on your commitment; don’t start if you know you may not finish.

Exercise

Build your visual collaboration journey

Now you should be close to seeing eye to eye with each other, and it is time for the last part of your joint checklist activities. In this last activity you are going to create a visual timeline that shows how your collaboration journey will look like. This is to ensure that you have a common idea of what activities and processes you will be going through throughout the journey of realising the project.

With the collaboration journey tool you will customize your collaboration with a collection of activities from which you can mix and match as you like.

Head over to the “Recommended activities catalogue” for further instructions.

3A – For SMEs

Budgeting

Before beginning the OPENNEXT journey, it is important to have a budget for dedication of the team's time to ensure there is enough person-hours to go the whole way on the project.

You should also make sure that time is set aside for peer-to-peer support activities that include both giving and receiving support throughout the process.

Additionally, you should have a plan for what to do if a team member leaves: who will step in and how should this situation be handled.

Allocating resources

Before beginning, you should make sure that you have access to all the right and necessary resources and materials you will need on the journey. This could include, but is not limited to, existing strategy documents, company data, budget numbers, design files, etc.

How will you learn

During your OPENNEXT journey, lots of new insights, opportunities and contacts will be created, and your ability to capture these and take action on them is in direct proportion to the success you will take away from OPENNEXT.

Before beginning you should have a plan for how you will capture, use, document and take actions on all the new insights you will be creating. Having the plan ready beforehand will prevent important findings from being lost and forgotten.

What will you do after OPENNEXT?

In this part you will create some reflections on what will happen once the OPENNEXT project is completed.

We recommend that you already now create a plan for finding resources and funding to realize your plans and goals for the outcome of the project - whether it is a new business plan, product development, or something third.

You should also already now reflect on how you will implement your results of the project into your current business.

Other needs

You might need additional counseling and guidance along the way. This section will make sure you are familiar with all the resources that are available for you and how you can use them.

3B – for Labs

Budgeting

Before beginning the OPENNEXT journey, it is important to have a budget for dedication of the team's time to ensure there is enough person-hours to go the whole way on the project.

Here you should also make sure that time is set aside for peer-to-peer support activities that include both giving and receiving support throughout the process.

Additionally, you should have a plan for what to do if a team member leaves: who will step in and how should this situation be handled.

Allocating resources

Before beginning, you should make sure that you have access to all the right and necessary resources and materials you will need on the journey. This could include, but is not limited to, existing strategy documents, company data, budget numbers, design files, etc.

Preparing the community

Now that you are all set, it is finally time to start engaging your community and presenting them with the exciting new opportunity. This section will remind you to confirm with the community that an interesting SME will join the lab.

You should also consider whether there are key figures in the community that can be connected to the SME for welcoming them and creating a good start for the SME.

Other needs

Do you have other needs that have not been addressed in this checklist?

If you need further counselling or have unanswered questions, contact one of the OPENNEXT partners.

Appendix B

SMEs and Makerspaces
Primer checklists
—
Will also be available as digital surveys

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Step 1

Finding The Right Match
Individual checklists for SMEs and labs

1A – for SMEs

Understanding OPENNEXT & matching expectations

Do you feel you have an understanding of what OPENNEXT can help you with? Please describe your expectations:

Do you feel you understand the limits of what OPENNEXT can help you with? Please describe your expectations:

Do you understand that OPENNEXT is based on peer-to-peer learning, which requires you “give and take”?

Yes [ ] / No [ ]

Describe how you understand the concept of peer-to-peer learning and how you will participate in the culture of “give and take”?:

Getting familiar with your specific role

Do you feel you understand what is required of you as SME in OPENNEXT?

Yes [ ] / No [ ]

Please describe what you are responsible for as SME

Please describe what you are NOT responsible for as SME

What part of the collaboration do you expect the LAB to be responsible for?

Understanding what open source means

Please start out by spending 30-60 mins familiarizing yourself with the concept of open source using this resource

https://danskdesigncenter.dk/en/understand-open-source-manufacturing-30-minutes

How do you understand open source as a concept?

How do you understand open source hardware?

How do you see this having potential for your company?

Getting your leadership on board

Please note down and define the roles and responsibilities of one or more leaders/decision makers in your company in relation to your engagement with the OPENNEXT project (ie. supervision, active participation, etc.)

Are there any gaps in between the sign-off from top management/ decision makers you have for OPENNEXT, and what you ideally wanted?

If yes, how will you make sure these are covered?

Set your purpose for taking part and uncover your needs

Please go directly to the Impact Assessment survey (OPENNEXT T4.5) and fill it out, before returning to this Checklist document and continue below.

Please describe your purpose for taking part in OPENNEXT:

Please describe your needs for taking part in OPENNEXT:

Setting your team

Note down who is on your team, their titles and what you expect their responsibilities in OPENNEXT to be:

Do you have any positions on your OPENNEXT team that still need to be filled?

Note down a strategy to fill remaining team positions:

1B – for Labs

Understanding OPENNEXT & matching expectations

Do you feel you have an understanding of what OPENNEXT can help you with? Please describe your expectations:

_____

_____

_____

_____

_____

Do you feel you understand the limits of what OPENNEXT can help you with? Please describe your expectations:

_____

_____

_____

_____

_____

Do you understand that OPENNEXT is based on peer-to-peer learning, which requires you “give and take”?

Yes [ ] / No [ ]

Describe how you understand the concept of peer-to-peer learning and how you will participate in the culture of “give and take”?:

_____

_____

_____

_____

Getting familiar with your role

Do you feel you understand what is required of you as LAB in OPENNEXT?

Yes [ ] / No [ ]

Please describe what you are responsible for as LAB

Please describe what you are NOT responsible for as LAB

What part of the collaboration do you expect the SME to be responsible for?

Understanding what open source means

Please start out by spending 30-60 mins familiarizing yourself with the concept of open source using this resource:

https://danskdesigncenter.dk/en/understand-open-source-manufacturing-30-minutes

How do you understand open source as a concept?

How do you understand open source hardware?

How do you see this having potential for an SME?

Getting familiar with the OPENNEXT resources

Please familiarize yourself with the OPENNEXT materials by studying the Main Guide, this Checklist and the Recommended Activities Catalogue.

How do you understand the Recommended Activities Catalogue? How can you benefit from using it?

How do you understand the Collaboration Journey tool? How can you benefit from using it?

How do you understand this Checklist? How can you benefit from using it?

Do you feel capable of facilitating all the activities?

Yes [ ] / No [ ]

If not, what activities will you currently not be able to facilitate and why?

Outline actions to resolve this issue, ie. learn new skills, bring other competencies on board your OPENNEXT team, etc.

Facilities

What must-have facilities do you currently have?

If you are missing some, which?

How will you gain access to missing facilities?

What nice-to-have facilities do you currently have?

What additional nice-to-have facilities could you get hold of for OPENNEXT, if any?

Preparing your community

How aware is your community currently of the upcoming OPENNEXT opportunity?

If necessary, outline how you plan to inform your community?

Who will have responsibility to take these community outreach actions, and what is the deadline?

Setting your team

Who will be project lead (main contact point for the SME)

Who will be the Community connector (someone to connect the SME with the Lab community)

Who will be technological lead (someone with a certain degree of technical expertise and knowledge of the industry domain of the SME)

Identify possible additions to your team that you would like to find, if possible.

How will you learn

What is your strategy for capturing / collecting / documenting learnings?

How will you ensure that learnings will be used and taken action upon?

How will you ensure that learning will be actively used to improve future OPENNEXT collaborations?

Prepare for building visual collaboration journey

[ ] Please read the Recommended Activities Catalog materials.

[ ] Print the Collaboration Journey canvas and Recommended Activity cards as instructed in the activities catalogue

Make sure this is done before you meet the SME for the next part (part 2) of the checklist.

Step 2

Seeing eye to eye
Joint checklist for SMEs and labs

2 — For SMEs and Labs

Understand each other: SME, meet the Lab. Lab, meet the SME.

LAB and SME: Do you agree that the terms you will agree upon while filling out this survey is to be seen as a “social contract”, and will you accept the responsibility to keep your agreements?

LAB: _____

SME: _____

Matching expectations

Share your expectations from the previous chapter of the survey with each other.

SME, how do you understand the expectations of the LAB?

_____

_____

_____

_____

_____

LAB, how do you understand the expectations of SME?

_____

_____

_____

_____

_____

Do you see any mis-alignments in expectations that you are

concerned about?

How will you align any such mis-alignments?

Getting familiar with each others needs; SME needs in particular

Note down specific needs of SME

How will you together make sure that the needs of SME are met?

Note down if LAB has any special needs

_____

_____

_____

_____

_____

How will you together make sure that the needs of the LAB are met?

_____

_____

_____

_____

_____

Do you share an understanding of what open source means

Talk about each of your understanding of open source, and make sure you arrive at a common understanding.

Please note down your common understanding of open source as a concept and open source hardware in particular:

_____

_____

_____

_____

_____

What does open source mean for your project with regards to the collaboration in general?

_____

_____

What does open source mean for your project with regards to the SME?

What does open source mean in your project with regards to the community?

What does open source mean in your project with regards to the Lab?

Setting the right attitude

Please formulate a short manifesto, which describes how you will strive to keep an open mind towards going outside your comfort zone together:

Setting a shared goal

Please discuss and note down one or more goals for joining OPENNEXT

How will you measure your success? Note down at least 3 KPI’s for each goal, so make sure your progress is measurable.

Work mode, flow, timing

When will you meet and how often?

Please list type of activities that will take place physically:

Please list type of activities that will take place digitally/ virtually:

Communication (internal)

What will be your main modes of communication?

Make an agreement on expectations around response time

Communication (external)

Talk about your existing external communication strategies and practices.

How will you communicate with the outside world?

What goals, plans and expectations for the project will you share publicly? And when?

What kinds of finding and learnings will you share publicly? And when?

What kinds of findings and learnings will you not share publicly? Why not?

Who will be sharing what publicly?

How will you make sure you keep up external communication?

Make sure you can finish

SME, do you accept the commitment to complete the collaboration?

LAB, do you accept the commitment to complete the collaboration?

Building your visual collaboration journey

Please find the Recommended Activities Catalog materials and complete a Collaboration Journey together. Make sure to document the end product by taking a photo (and/or keeping the canvas).

Have you completed this task? (Confirm)

[ ] YES / [ ] NO

Step 3

Getting off on the right foot
Individual checklists for SMEs and labs

3A – for SMEs

Budgeting

Please outline your budget (person hours, production budget, marketing, etc.).

(Feel free to set it up in a separate document instead of here).

How will you distribute peer-to-peer support hours?

How will you handle it if a key person leaves the project before completion?

Describe a mitigation strategy to find a stand-in or decide who will take over the different responsibilities of your team:

Allocating resources

Note down the resources you will need:

If you are missing some (ie. particular competencies, materials, etc.), note them down:

Set a deadline and plan for acquiring the missing resources:

How will you learn

Do you already have an expectation of what you will be learning? Not it down:

_____

_____

_____

_____

_____

How will you make sure you capture and document your learnings and findings?

_____

_____

_____

_____

_____

How will you make sure you take action on your findings?

_____

_____

_____

_____

_____

What will you do after OPENNEXT?

What do you imagine will happen after OPENNEXT is completed?

_____

_____

Do you foresee any challenges that might show up after the program?

How might you work through these challenges?

How do you imagine you will keep using what you have learned after the program is completed?

Try to make a specific strategy of how you will continue after OPENNEXT

How do you plan to find the necessary resources and funding after the project is completed?

Other needs

Do you have any needs or unanswered questions?

How, where and when will you seek support?

3B – for Labs

Budgeting

Please outline your budget (person hours, production budget, marketing, etc.).

(Feel free to set it up in a separate document instead of here).

How will you distribute peer-to-peer support hours?

How will you handle it if a key person leaves the project before completion?

Describe a mitigation strategy to find a stand-in or decide who will take over the different responsibilities of your team:

Allocating resources

Note down the resources you will need:

If you are missing some (ie. particular competencies, materials, etc.), note them down:

Set a deadline and plan for acquiring the missing resources:

Preparing the community

If you have not notified your community, make a plan to do so: _____

Set a deadline for notifying your community:

Who will be key figures in establishing contact to the community?

Other needs

Do you have any needs or unanswered questions?

How and when will you make sure to seek support?

Appendix C

Catalog
Recommended activities

Catalog
Recommended activities

Suggestions from companies and labs on how to have a fruitful OpenNext experience

OPEN!
NEXT

Introduction

The Recommended Activities Catalog is a resource for SMEs and Labs engaging in an OPENNEXT collaboration can use to sketch out their shared journey. It is intended as a visual and tactile tool that outlines activities over the duration of the collaboration, and precedes more detailed planning to made using the iPeM model (D5.1).

The Recommended Activities Catalog will continue to expand as the pilot and demonstrators will unfold and is meant to be a “living document” that continues to develop as expertise in the OPENNEXT consortium (and beyond the project) grows from experience.

The activities in the Recommend Activities Catalog were conceptualized through a series of 12 hands-on, on-location workshops for the OPENNEXT pilot SMEs, facilitated by the the participating OPENNEXT Labs, in which they crafted specific user journeys for the 6 SME pilots, during two rounds of iteration. All the suggested activities were then pooled into a draft catalog, iterated and homogenized.

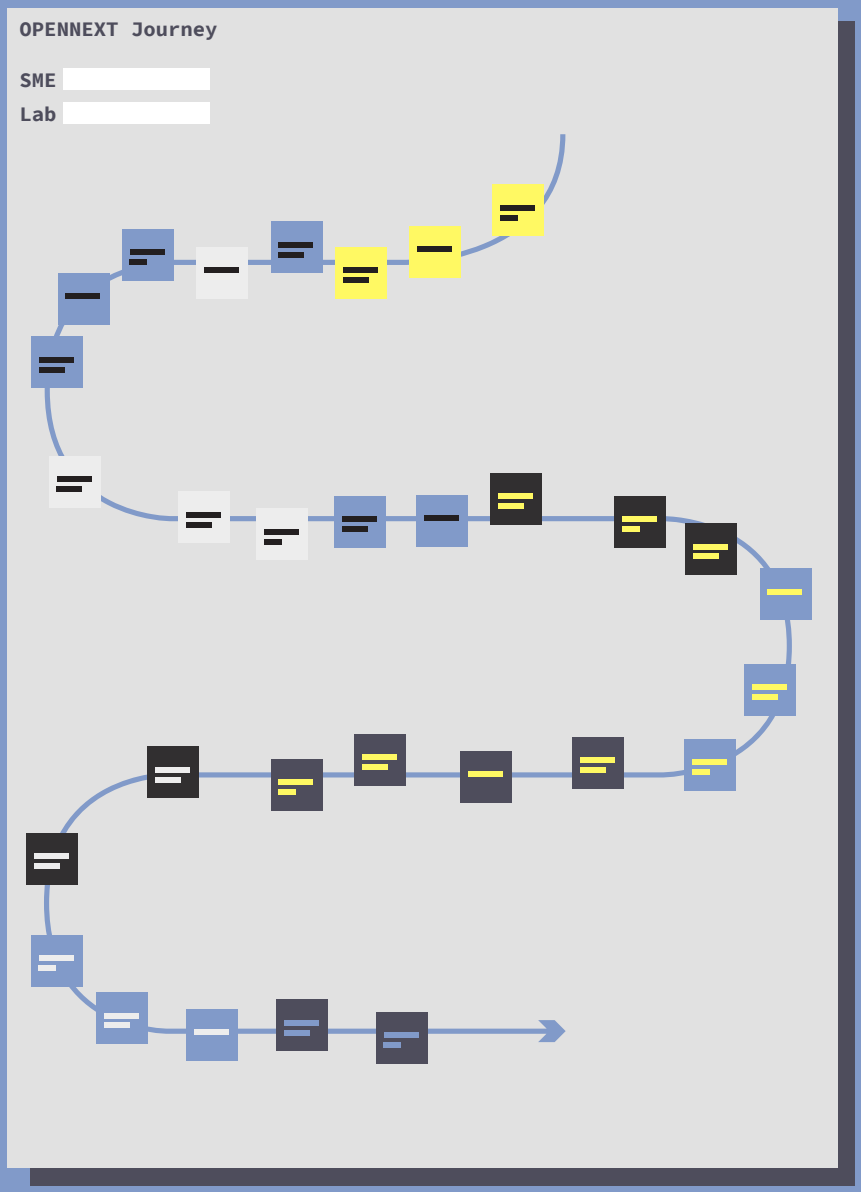
It is important to note that the current selection of activities represent a point of departure, and that the selection will continue to expand as OPENNEXT progresses. Any Lab can add to the catalog, which will be organized centrally and digitally (as a wiki or similar open source, public-facing web interface that allows multiple contributors).

How to use

The Lab, as facilitator, prints the catalog and cuts out the Recommended Activities pieces as well as the user journey canvas.

The Lab and the SME then meet for a joint brainstorm to imagine the journey by selecting which Recommended Activities they see useful to do together and placing them on the user journey canvas to illustrate a chronological order of the activities.

The outcome is a fully visualized user journey for the collaboration, which can (and most likely will) be iterated and changed as the collaboration progresses, and in particular as the user journey is transferred and streamlined into the iPeM model as one of the following steps.


OPENNEXT Journey
SME
Lab

Chapters

Getting ready to begin

01

It is a given that before starting the project it is important to know what it is all about. In this first chapter, you can choose a number of activities that help gain a basic understanding of the main components of the OPENNEXT project: What is open source production? What is community driven innovation? This is especially helpful if some participants are not yet familiar with these concepts. Gaining a basic understanding for the whole team is a helpful way to ensure that everyone sets out from the same place. Other activities that might be taken up in the very beginning, could be reaching out to collaborators and existing communities, to create awareness of the upcoming possibility and spike an interest for potential partnerships or participation.

These activities are priming activities that all makes sense to do before the partnership takes tangible form.

Activities recommended by SMEs and labs

Getting ready to begin

Reach out to potential collaborators

Getting ready to begin

Learn about community driven innovation

Getting ready to begin

Get introduced to open source

Getting ready to begin

Reach out to existing communities

+
See more suggestions from leading experts and researchers in the **IPeM**

Understanding each other

02

Before starting out, take time to understand and empathize with each other - It is crucial for a successful collaborative process. What does the other (LAB/SME) do, what are your goals? Expectations? Hopes? And so on. Understanding each other can mean to define and clarify shared goals, but it can also mean to discover parts where your views might differ. By taking time to understand each other, you may be preventing future misunderstandings and confusion.

Activities recommended by SMEs and labs

Understanding each other

Clarify incetives for collaboration

Understanding each other

Define shared values

Understanding each other

Define the focus of the project/ collaboration

Understanding each other

Learn about each other by conducting interviews

Understanding each other

Go on field trips and visit each other

+
See more suggestions from leading experts and researchers in the **IPeM**

Understanding the context

03

Understanding the context of what you are working with can be a helpful, sometimes crucial, way of ensuring that you are on the right path, or about to set out in the right direction. The context will vary according to what you are going to be producing within your specific collaboration. How you want to gain your understanding of your specific context might also vary from project to project, but in most projects it is often done early in the process.

Activities recommended by SMEs and labs

Understanding the context

Conduct resarch with a focus group

+
See more suggestions from leading experts and researchers in the **IPeM**

Developing a concept

04

The development of a business concept has several phases. According to the specific level of business knowledge and experience within your SME/LAB collaboration, developing a business concept can range from learning about business concepts and models, to brainstorming and developing business ideas.

Activities recommended by SMEs and labs

Developing a concept

Learn about business models

Developing a concept

Research other cases

Developing a concept

Outline an open business model

Developing a concept

Brainstorm on potential cases

Developing a concept

Host an open brainstorming session

+
See more suggestions from leading experts and researchers in the **IPeM**

Framing the collaboration

05

Framing the collaboration means making agreements about the technical and concrete ins and outs of the project and your collaboration. These are agreements on matters such as processes, tools, KPIs, skills, and responsibilities that define key parameters of how the collaboration and project will work.

Often, framing a collaboration is important, because it ensures that specific needs and wishes of both parties won't be missed, but rather be taken into consideration and planned for., increasing the chances of a successful collaboration process and final outcome.

Activities recommended by SMEs and labs

Framing the collaboration

Set the scope of the collaboration

Framing the collaboration

Decide what tools you will be using

Framing the collaboration

Plan how you will produce documention

Framing the collaboration

Align your goals and KPI's for the project

Framing the collaboration

Idenify relevant skills needed to complete the project

Framing the collaboration

Make a budget for expenses

Framing the collaboration

05

Framing the collaboration

Decide on the methodology you will apply

Framing the collaboration

Define your individual roles in the partnership

Framing the collaboration

Create a roadmap for your collaboration

Framing the collaboration

Set up rules to frame your collaboration

Framing the collaboration

wrtite a design manifesto

Framing the collaboration

Learn about how to use open source licenses

Framing the collaboration

Align strategies

Framing the collaboration

Discuss and define how society can benefit from the project

Framing the collaboration

Create a sustainability strategy

Learning and validating

06

Gaining knowledge and learning new things is a big part of the OPEN-NEXT project, and it will be a big part of your process too. Things you have planned for might not go or work as planned, and the things you have decided upon might benefit from being rethought. Validating your knowledge is a way of making sure you are on the right track. When and how you go about knowledge validation might vary from project to project, but is often universally recommended.

Activities recommended by SMEs and labs

Learning and validating

Plan a series of ‘reality checks’

+
See more suggestions from leading experts and researchers in the **IPeM**

Building a community

07

Creating and building a great community around your project is of utmost importance. The art of community building requires several skills: from strategies of attracting, approaching, and recruiting members, to matchmaking, scaling and maintaining your community. The positions and means of LAB and SME to interact with the community are different, but should both be utilised.

Activities recommended by SMEs and labs

Building a community

Learn the basics of community building

Building a community

Recruit the right people for your community

Building a community

Learn how to maintain a healthy community

Building a community

Learn how to involve users in your project

Building a community

Learn about way to give back to your community

Building a community

Create a call for action

Building a community

07

Building a community

Create matchmaking between makers and your project

Building a community

Approach an existing community

Building a community

Learn methods to scale your community

Building a community

Host a hackathon to engage community members

+
See more suggestions from leading experts and researchers in the **IPeM**

Creating a prototype

08

Prototypes are a key feature in your process. They are great because they let you test your ideas and allow you to iterate the things that do not work before creating your final production plan. Creating a prototype can mean various different things to different types of projects. That means prototypes can look vastly different according to your specific project. The implications of creating a prototype ranges from understanding your material, understanding how to use facilities, learning how to design your prototype, to testing and learning how to use it to perfect your final mode of production.

Activities recommended by SMEs and labs

Creating a prototype

Learn about design and prototyping with a design course

Creating a prototype

Get introduction to the basics of digital fabrication

Creating a prototype

Source materials for your prototype

Creating a prototype

Document the prototyping and production process

Creating a prototype

Iterate your work for edits and improvements

Creating a prototype

Build a mock-up of your prototype

Creating a prototype

08

Creating a prototype

Build your prototype

Creating a prototype

Test your prototype with users

Creating a prototype

Conduct an acceptance test

+
See more suggestions from leading experts and researchers in the **IPeM**

Producing a product

09

The first step towards getting a final product out there is to produce it. Learning how to set up production — especially distributed production — is important if you want to fully harness the power of community driven innovation.

Activities recommended by SMEs and labs

Producing a product

Learn how to setup co-manufacturing production

Producing a product

Test with a pre-production prototype

Producing a product

Learn how to design for production

+
See more suggestions from leading experts and researchers in the **IPeM**

Launching to public

10

Launching is an important step in the process that should be paid careful attention to, as you will now experience your hard work and efforts come to life. One thing is getting the product out there, another thing is making sure all documentation and supporting materials are ready.

Activities recommended by SMEs and labs

Launching to public

Create a plan for implementing your product

Launching to public

Learn how to successfully fundraise

Launching to public

Prepare documentation for launch

+
See more suggestions from leading experts and researchers in the **IPeM**

Analysing and evaluating

11

Evaluating the outcome and processes of your project is an important way to ensure that you will keep benefitting from the hard work you have put into this project. Analysis and evaluation does not only make sense at the end of the journey, but can be conducted throughout the process to ensure that you keep up your standards and that everything is running as it should be. Evaluation and analysis throughout the process allows you to iterate, upgrade, or come up with new and better solutions to things that are not going well or could be going better. Essentially, analysis and evaluation is crucial in optimizing the value of the product you are creating and the processes you have designed and work under.

Activities recommended by SMEs and labs

Analysing and evaluating

Evaluate your business plan

Analysing and evaluating

Have a goodbye session before you finalise the collaboration

Analysing and evaluating

Learn how to continually evaluate the health of your community

Analysing and evaluating

Evaluate the quality of your contribution to community

+
See more suggestions from leading experts and researchers in the **IPeM**

Next step

Transfering the user journey into the iPeM model

Once the user journey exercise using the Recommended Activity Catalog has been completed, the Lab and SME will move on to using the iPeM model (D5.2) to structure the collaboration and set the timeline firmly.

There recommended activities in this catalog will be updated to follow the same categories as the IPeM model.

Appendix D

Poster
Collaboration journey exercise

OPENNEXT Journey

SME

Lab