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## Disciplined Dreaming

### A Proven System to Drive Breakthrough Creativity

#### THE SUMMARY IN BRIEF

If you are not tinkering with your business every day, sooner or later the markets will begin to tinker with you — and it won't be pleasant.

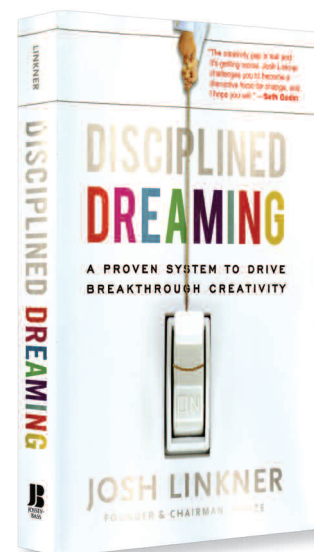
In *Disciplined Dreaming*, business innovator and jazz musician Josh Linkner shows exactly how you can create profitable new ideas, empower employees to flex their creative muscles and tap into the power of creativity to sustain a competitive advantage over the long haul. Drawing on interviews with hundreds of successful CEOs, entrepreneurs and artists, Linkner distills exactly how creativity can be encouraged, as well as its impact on the bottom line.

*Disciplined Dreaming* outlines a proven, easy-to-apply five-step process — Ask, Prepare, Discover, Ignite and Launch — that will help you and your team develop your creativity chops. Through illustrative stories, real-world examples and fun, yet practical, exercises, Linkner shows leaders and team builders how to become immediately more effective in discovering new routes to profitable solutions.

Designed to be flexible, *Disciplined Dreaming* clearly demonstrates how creativity can be used for everything from innovative, game-shifting breakthroughs to incremental advances and daily improvements to business processes. With *Disciplined Dreaming*, even the most resistant corporate bureaucracies can cultivate creativity and become more competitive in today's shifting marketplace.

#### IN THIS SUMMARY, YOU WILL LEARN:

- A road map for individuals, teams and companies that leads to new ideas.
- How to use a systematic approach to becoming a winning improviser.
- How to avoid unpleasant pitfalls in the marketplace.
- How business leaders at all levels can unleash creativity in order to reach their full potential.



by Josh Linkner

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# THE COMPLETE SUMMARY: DISCIPLINED DREAMING

by Josh Linkner

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## Introduction

Disciplined Dreaming is a system for expanding creative capacity, fueling competitive advantage and building personal and professional growth. Businesses have systems and processes for everything, from answering the phone to taking out the trash. Remarkably, most companies have no such system for the one thing that matters most: developing and growing creative capacity. Disciplined Dreaming provides a specific system to attack any Creativity Challenge, big or small, and, in the process, build a culture of creativity and sustained growth for individuals and their organizations.

Companies that have “innovation processes” often stifle the creativity of their organization by making those processes too rule-driven, formal and restrictive. In contrast, Disciplined Dreaming is an open system that focuses on the creative mindset and philosophy along with specific techniques, rather than a rigid code of rules. ●

## The Case for Creativity

Microsoft is a great example of the dangers of betting on the past instead of the future. Windows and Office remain dominant in the market and have generated more than \$100 billion in profit for Microsoft in the last 10 years alone. For years, Microsoft was the poster child of innovation and thought leadership; but then its focus began shifting to past successes, causing the company to miss out on important advances. While Microsoft placed its bets on an established customer adaptation cycle, its competitors innovated. So the company lost to Kindle, Sony and Apple in the e-book world; it lost to Google in the Internet search world; it lost to Wikipedia in the

online encyclopedia market; and it lost to Apple in the digital music sphere. And Microsoft completely missed mobile phones and tablet PCs.

The rate of change in the new era of business has dramatically accelerated and ever-shorter product life cycles put ever-greater demands on creative capacity. The new model for winning a better future is to remain on the forefront of innovation. To do that, organizations have to use their resources to place smarter bets earlier and faster. That requires the creative foresight to know when it's time to shift investments forward — even if it means sacrificing the golden goose.

## Are You Ready to Become a Disruptive Force of Change?

You may not like it, you may wish things were different, you may look fondly at the past, but none of this matters: The rules have changed. The financial meltdown and global recession of 2009, combined with globalization, rapid advances in technology and communications, population trends, geopolitical movements and a next-generation work force, have made the past irrelevant. These changes punctuate the end of an era and signify the beginning of a new one.

For you and your company to win in the Age of Creativity, you need to nurture and develop your creative skills to become more like an artist than a technician. In this marketplace, you have to be able to add value in the face of uncertainty. You can't rely on a rulebook to figure out what to do next. Instead, your rewards will be based on fresh ideas, improvisations and a willingness to release your grip on the status quo. You need to be the disruptive force of change or you run the risk of getting knocked out of the competition. ●



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### Disciplined Dreaming: Your System for Creativity

As you practice the Disciplined Dreaming system, you'll find ways to inject creativity in every setting of your business life, from your Monday morning staff meeting to setting up the trade show booth, from finding a better way to install the tires on a new car to coming up with a new cocktail recipe in the bar of your hotel chain employer. Don't limit the system to product development meetings; think of Disciplined Dreaming as part of your personal and organizational DNA.

#### Expanding Your Creative Vision

Here are some tips to consider as you allow your mind to explore in new directions:

- **Tolerate ambiguity.** There will be times when things don't add up or you feel as though you are off track. These are often the situations where you are getting very close to a breakthrough. Keep pushing forward!
- **Avoid "right" and "wrong" answers.** Focus more on the questions — especially open-ended questions — than on the answers.
- **Accept ruts and grooves.** There will be times when you feel as though nothing is clicking, then out of nowhere, the ideas begin to pour out of you. Focus more on the process and on driving curiosity than on trying to force results.
- **Listen.** Renowned creative director and television producer Lori Weiss believes that listening is the key to creativity. She urges her colleagues to always be open-minded and to listen — to what people say, what they don't say and what the environment is telling them. You will connect to a wellspring of creativity if you clear your mind and listen.
- **Don't be rigid or stubborn.** Don't let your experience translate into your being hardwired to the past.
- **Seek input.** The more diverse minds you can deploy against your Creativity Challenge, the more possibilities you will be able to consider. Seek input from unrelated fields and different perspectives.

Above all, remember to challenge everything. Challenge assumptions. Challenge the status quo. Challenge the "complacent incumbents." Challenge the rules. Challenge yourself. ●

### Step One: Ask

The first step of the Disciplined Dreaming process is

### The Growing Creativity Gap

We have an increasing need for creativity in the business world, but a decreasing supply — conflicting trends that have created a large and growing creativity gap. For perhaps the first time in our history, American creativity is on the decline. In fact, researcher Kyung Hee Kim at the College of William and Mary has found that predictors of creativity among our population rose steadily until 1990, but have been inching downward ever since, in what Kim describes as a "very significant decrease."

The creativity gap will determine the economic potential of every individual and organization in the years ahead. Closing the creativity gap is what Disciplined Dreaming is all about.

to define your Creativity Challenge — the specific problem you want to solve. As the old saying goes, "You'll never hit a target you cannot see." The more clearly and thoroughly you detail your Creativity Challenge, the more effective you'll be at resolving it.

In Disciplined Dreaming, the *Creativity Brief* is a tool you can apply to make any creative pursuit more successful. By providing a system for organizing your thoughts up front, the Creativity Brief will serve as your North Star and guide you toward the best possible creative outcome.

#### The Creativity Brief

Here is a review of each of the sections included in the full Creativity Brief:

**Section I: Describe the Desired Outcome.** Your first task is to write a *one-sentence* description of the desired outcome of your Creativity Challenge.

**Section II: Define the Creativity Challenge.** What is the problem you are solving for? Can you restate it in a few different ways? What about reversing it? Write 20 questions about your challenge. What is the need for change? What value is created by doing something new? What is a simile for the challenge? Can you establish a "spine"? If so, what is it? List key observations and assumptions about the challenge. Could you paint a picture or make a model of the challenge?

#### Section III: Situation Analysis.

a. *Past:* What worked and didn't work, and why? What consequences have occurred? What baggage exists?

b. *Present:* What are you currently doing? What is conventional wisdom? What is the status quo and who is trying to protect it?

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*c. Future:* What does the ideal solution look like for this challenge? How will the world be better if you get this right? What difference will a great outcome have on your company, your career or both?

**Section IV: Resistance.** Who would lose if this problem were solved? List the roadblocks that may get in your way. What are the financial considerations that could limit your creativity? What do you and your team fear? Complete this sentence: *We would be completely successful in this effort if only ...*

**Section V: Target Audience(s).** Whom is the idea for? Whom do you need to convince? Once implemented, whom will this idea impact?

**Section VI: Communication Strategy.** How will you communicate to others about the idea? Will you seek feedback along the way or keep it quiet until launch? What is your plan to roll out the idea once complete?

**Section VII: Competition.** Who else is trying to solve this same challenge right now? Are there competitive ideas? Is your idea competing with other Creativity Challenges for resources?

**Section VIII: Project Plan.** Break the Creativity Challenge into smaller mini-challenges to make it easier to manage. Establish the tone and style of the project. List the rules of the road — the dos and don'ts. Set specific deliverables or outputs you expect from taking this Creativity Challenge. Establish the budget. Create a timeline including key milestone dates and the people responsible for various tasks along the way.

**Section IX: Key Metrics.** How will you define success? List three to five key performance indicators (KPIs) for measuring the success of your Creativity Challenge. If everything goes well, what level of return on investment could you realize?

Your Creativity Brief will be your guide to vision, clarity and action as you resolve your Creativity Challenge. ●

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### Driving Curiosity and Awareness

Three simple questions can lead you to more (and more astounding) breakthroughs. Tape these to the walls, make them into a screen saver and tattoo them on your teammates:

1. **Why?**
2. **What if?**
3. **Why not?**

These questions can help you address issues of any size, and you can certainly use them when tackling your

Creativity Challenge. Asking “Why?” helps you understand the current state of affairs, and challenge the status quo and conventional wisdom. When you ask “What if?” you are exploring fresh possibilities and imagining how the world would look if you made a change or if a new idea came to life. Asking “Why not?” helps you understand constraints. It allows you to connect with the limiting factors that are currently blocking positive change.

### Opening Your Beginner's Mind

An exceptionally bright student was training to become a monk with a master at a Zen monastery in Japan. The student was a bit arrogant and liked to show off his knowledge to other students. One day, the master sat down with the student for tea. The master poured tea into the student's cup until it ran over and the tea spilled over the table.

“Master!” cried the student. “Can't you see the cup is already full and cannot accept any more tea?”

“Exactly,” said the master. “Just like you, so full of ideas that you cannot accept any new ones. You must approach your study with an ‘empty cup’ so you leave room to accept new ideas. How can you accept anything new if your cup is already full?”

This story illustrates a concept known in Eastern philosophy as having a beginner's mind — a mind that remains completely open to new concepts. As people progress in life (and their careers), they become filled with preconceived notions, assumptions and history that can cloud their thinking.

To spur curiosity, you want to develop your beginner's mind. As you embark on the creative process, for example, shake things up. Change reading habits, patterns, food, music, the route you take to the office, sleeping habits and anything else you can think of. These changes will raise your awareness and help you connect with the world in fresh ways. ●

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### Step Two: Prepare

You need to be in the right frame of mind to free yourself from creative barriers and release your true creative potential.

Tony Robbins, the world-famous motivational speaker, jumps on a portable trampoline for three to five minutes before every speech. Lennox Lewis, the former heavyweight boxing champion, listened to fast, intense jazz music on a headset before every fight. In the same way that a musician warms up with scales and stretching exercises before giving a concert, you can warm up your

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mind and get in the zone. Preparing yourself to be creative will allow you to unleash your best ideas right out of the gate.

### Building Creative Cultures

Mental preparation is a good place to start getting ready for the creative process, but a creative mind needs a creative culture in which to flourish. There is an undeniable correlation in organizations between high levels of innovation and cultures that nurture creativity.

Every great structure requires ongoing maintenance. You can keep your creative culture alive and flourishing by making sure your operation is guided by these seven critical rules:

- 1. Fuel passion.** To promote passion in your team, develop a sense of purpose, promote collaboration and have fun.
- 2. Celebrate ideas.** In a creative culture, rewards come in many forms: money, yes, but great businesses also celebrate creativity through praise (both public and private), career opportunities and perks. If you want your team to be creative, you need to establish an environment that celebrates and rewards them accordingly.
- 3. Foster autonomy.** People and teams that can call their own shots are better able to produce valuable creative output, whereas a person who has to run every minute detail by his or her boss for approval will quickly become numb to the creative process. That's why fostering autonomy is a critical step in maintaining a creative culture.
- 4. Encourage courage.** Netflix is known as much for its creative culture as its innovative business model. The company has continued to grow and thrive by encouraging employees to take creative risks without fear. They tell their employees to "Say what you think, even if it is controversial. Make tough decisions without excessive agonizing. Take smart risks. Question actions inconsistent with our values."
- 5. Fail forward.** As a business leader, you need to be very tolerant of risk-taking and setbacks. Rather than thinking of something that doesn't work immediately as a "failure," think about it as an experiment. I call these experiments Failing Forward, because each one leads you one step closer to the perfect solution.
- 6. Think small.** When you want your creative culture to foster big ideas, it's important to think small. Smaller companies tend to be more curious

and nimble. They have a stronger sense of urgency and are not afraid to embrace change. In contrast, larger organizations often exist to protect old ideas rather than to create new ones.

- 7. Maximize diversity.** As competition increases, generic one-size-fits-all products and services are easily supplanted by products tailored to niche audiences. To connect with customers, you need to really understand the world from their perspective, not yours — this is one area where a diverse culture can make a huge difference. ●

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## Preparing Your Environment to Promote Creative Passion

Your physical environment has a direct impact on creativity.

If you want to see how important the physical work environment is to a creative company, visit Google's headquarters in Mountain View, Calif. The "Googleplex" looks and feels like an energetic college campus. Going from building to building is easy — jump on a Razor scooter or Segway and head to your destination (just leave it there for the next person to use when you're done — no need to sign it out). Each building is decorated with funky artwork and cool colors, and is well stocked with free food and drinks. Employees are encouraged to bring their friends and family for free meals in the warm and welcoming cafeteria. This dynamic and family-like environment sparks creativity and passion throughout the team.

A creative environment is an incredible recruiting and retention tool. If you were a bright, creative person at the top of your game and had your choice of nearly any company to work for, what would be attractive to you? A bland, beige cube farm filled with old-school, bureaucratic clutter? Or a surprising and stimulating environment designed to delight and inspire?

### Shaking Things Up

The way you use your environment plays an important role in how much creative "juice" it produces. Eric Lefkowsky, co-founder of Groupon, is an incredible serial entrepreneur who has taken four companies public, has invested hundreds of millions of dollars in new ventures and employs thousands of talented people. To keep things fresh, he randomly reassigns seating for hundreds of people in his main Chicago facility on a regular basis (every month or two). Lefkowsky believes that this kind of periodic shake-up provides his team with a fresh perspective, a new vantage point. By being moved around,

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people make different connections with other team members and never get too comfortable. This approach is a powerful stimulus for creativity. ●

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### Step Three: Discover

Discover is the third phase of the Disciplined Dreaming process. In this stage, you break free of the straitjacket of “We’ve always done it that way” or “This is our usual approach” or “We don’t have the luxury of trying something new.”

Legendary jazz trumpeter Miles Davis believed that musical creativity was an act of discovery. Simply put, he thought that the music already existed and it was his role as an artist to discover it. Throughout the four decades of his extraordinary career, Davis constantly searched for inspiration from a wide variety of sources, exploring new boundaries at every turn, going well beyond the normal confines of the jazz of his day. We’ve seen how your mental cultural and physical state can boost your creative abilities by preparing you for the creative journey. That journey is all about discovery.

#### Looking Through a Different Lens

Looking at a problem from a new perspective, perhaps by playing a particular role, is an excellent way to discover creative new approaches and solutions. This approach can be called “a Different Lens,” and it involves, quite simply, looking with fresh eyes at a problem you’re thinking about.

In your next brainstorming session, for example, think about the issue from the perspective of a musician — or a villain or an architect. By role playing, you can find that fresh perspective yourself, even when looking at problems you’ve been struggling with for a long time.

#### Capitalizing on Inflection Points

Andy Grove, the former chairman and CEO of Intel, often said that opportunities are hidden in inflection points — a point where one social or business trend changes trajectory and starts off in a new direction. Points of change have marked business breakthroughs more often than not and offer perceptive entrepreneurs irresistible chances to launch new enterprises. By carefully examining inflection points, we can discover spectacular business opportunities.

Today inflection points occur constantly. They happen when we see changes in political administrations, climate, consumer preferences, foreign relations, technology, health and fitness, travel habits, fashion and music.

The trick is to spot the point of change — the point where you can define a “pre” and a “post” condition that signals an inflection point. The entire trend-spotting industry labors to help us see these inflection points while they’re first developing so that we can capitalize on the opportunities they create. ●

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### Step Four: Ignite

Think about your creative potential as a raging forest fire. Extraordinary heat and furious energy, growing and spreading with explosive power. Forest fires don’t magically appear out of the blue. There’s no such thing as an entire forest spontaneously combusting in the blink of an eye. Instead, they begin with a spark. The spark could come from a cigarette butt, a leftover campfire or a lightning bolt, but a single spark is required to begin. The same is true for your creativity and, specifically, for beginning a creative project.

Often, the first part of generating an idea isn’t formulating a complete and thorough concept, but rather looking for sparks.

#### Look for Little Flashes of Inspiration

A creative spark need not be a fully baked idea. In fact, most aren’t. Look for little flashes of inspiration or thoughts to get your work under way. If you are working on a new ad campaign, a spark could be a collection of a dozen of your favorite campaigns by other companies. A chef’s spark may be a single ingredient, such as cilantro, to begin a new chicken recipe. A product design spark may be a simple idea for a new grip on a toothbrush.

When trying to spark your creative flame, remember these two points: (1) start with a number of small sparks, no matter how incomplete, to begin the creative process; and (2) be very careful not to quickly extinguish those sparks.

Your initial creative sparks are fragile and need support and nurturing to grow into your own creative fire. The most common way to prematurely kill your sparks is to switch into left-brain, analytical mode. Your little, young, fragile spark is no match for the brutal attack of fear-based thinking.

Don’t forget to keep your creativity directed toward solving your Creativity Challenge. Focus on finding the best — not the most complex — solutions. Let your creativity flow completely unrestricted throughout the creative process, but then select the solution that will create the best results, not the most dazzling display. ●

### Igniting the Sparks of Creativity: The Four Most Powerful Techniques

Here are four of the most effective exercises to keep the excitement building during brainstorming sessions:

- **EdgeStorming.** To begin your own EdgeStorming session, conduct a normal brainstorming session where various people from the group toss out ideas, but ask the group to take each idea to its furthest possible extreme. To make the list, ideas must be outrageously big or small, loud or soft, expensive or cheap. By forcing yourself to the edges, you'll uncover countless fresh and new ideas.
- **The Long List.** This is a technique for developing fresh ideas that I first learned back in college, and still use today with great results. I was in a course about creating magazine and newspaper ads. The class was divided into teams and we were assigned the task of developing headlines for a Florida State Lottery ad campaign. No problem, we thought, until the professor dropped the bomb. Each group was to return with no less than 200 headline ideas. We had 60 minutes. Wowza!

To get the most from the Long List technique, follow these four simple steps: articulate the objective, set your idea goal, do short bursts and let it rip.

- **RoleStorming.** We've talked about adopting different personas and role playing as a way to prepare for the creative process. RoleStorming takes this idea one step further to help you develop your creative ideas without hampering them with too much left-brain editing or execution. In effect, you invite Steve Jobs to join your team.

If you have a six-person team, it has now grown to seven because Steve Jobs has joined the group. Imagine that he is actually sitting there as you and your group launch the brainstorming process. In addition to each person contributing as him- or herself, have each person also suggest ideas on behalf of Steve Jobs. What ideas might he have to create a transformational breakthrough?

- **SCAMPER.** Advertising legend Alex Osborn not only founded one of the most successful ad agencies in the world, BBDO, but also coined the phrase *brainstorming* and is credited for inventing the technique. Later in his career, he invented another technique that is less well known but incredibly powerful: *SCAMPER*. This name is an acronym and stands for:

*Substitute.* Corn flakes led to Bran Flakes (substitute ingredient).

*Combine.* Raisin Bran was born from combining bran flakes with raisins.

*Adapt.* Cinnamon Toast Crunch came from borrowing the flavor of cinnamon toast and then adapting it into a cereal recipe.

*Magnify or minimize.* Frosted Wheat became Frosted Mini Wheats.

*Put to other use.* Rice Krispies Treats are now packaged in separate units and sold as a competitor to the candy bar.

*Eliminate.* Without nuts, reduced fat, sugar-free, only whole grains — Eliminating one or more aspects of an idea is a clever way to uncover brand new ideas.

*Rearrange or reverse.* Post launched Honey Bunches of Oats in 1989. Today you can enjoy your Honey Bunches packaged with almonds, bananas, peaches, strawberries, chocolate clusters, cinnamon clusters or vanilla clusters. What did Post do next? The company launched Just Bunches, eliminating the other elements of the cereal altogether. ●

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### Step Five: Launch

Welcome to step five of the Disciplined Dreaming process: Launch.

You've come up with a range of good ideas and now it's time to select the best of them. Here is one technique for narrowing down your choices to a single, best idea: the Matrix.

#### Scoring Your Ideas: The Matrix

The most common approach to idea selection is the Matrix Scoring technique. This is a powerful technique and can help you choose your best ideas and sell them to outside stakeholders. Using it, you will take a handful of your best ideas and score them on several factors that are most important to you. You'll then add up the total scores.

The scores from this technique should guide your decision-making process, not determine it. Use the numbers to support your judgment; you aren't subject to them.

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## Testing Your Selections

Prototyping is a powerful way to carefully examine ideas and begin to assess their real-world potential. Prototyping need not involve complex machinery or big investment. No matter how crude, anything you can do to bring your idea to life so that you can examine it in a 3D format will help you determine whether it should receive further support or if you should move on to the next idea.

What about when the idea involves a service? Or experience? Or people? Role playing is the ideal technique to help determine which ideas make the most sense and to identify any “soft spots” that may exist. Simply act out the customer experience or service you are proposing. The more realistic the better.

## Setting Your Metrics: Measurement

Once you’ve narrowed the field to one or two of your best ideas to pursue, you should think about how you plan to measure them. Solid metrics will help you not only determine the success of your idea as it relates to your Creativity Challenge, but also secure necessary buy-in from others (bosses, investors, the board of directors, partners, suppliers and so on). Zeroing in on key metrics and measuring against them as your idea comes to life will also help you refine the idea as it evolves.

Select the top key metrics that you plan to measure and track as your creative project moves forward. Warning: Don’t choose too many metrics to monitor or you will quickly lose focus. Narrow the field to a handful of the most important data points and stay focused on those.

## Building Your Action Plan

You’ve finally made it to the exciting point of launch. You and your idea are about to blast off, and you’ll soon be enjoying the benefits of your creativity. It is critical that you build a detailed execution plan to ensure that your great idea doesn’t explode on takeoff.

Make sure that you’ve covered the basics, including:

- Budget, forecast and anticipated return-on-investment model.
- Roles and responsibilities of team members during the execution phase.
- Detailed timelines with clear milestones and checkpoints.
- List of the top risks and contingency plans if they occur.
- Resources needed (money, people, time, equipment, facilities, travel and so on).

## Building Your Creativity Chops

Jazz musicians call the time and effort they invest in developing their musical skill “building chops.” The Disciplined Dreaming system suggests a framework of ideas, processes and practices for building *your* chops by expanding your creative capacity.

Answer the following questions to gain a clearer picture of the way you currently approach the creative process:

1. What percentage of your time is spent creating something new, as opposed to working out operational details or protecting the past?
2. List five ways that you can beat your competition. How could they beat you?
3. If you were entering your industry as a startup, how would you break the mold to beat the incumbents?
4. What elements of the past or status quo are you clinging to? What do you need to let go of?
5. How could placing your bets earlier drive your bottom line?
6. List five ways your company is stagnating; for each of these, list at least two ideas addressing how you can break through those barriers.

- Communication and rollout plan.

## Take Care of Business

It is time to gracefully transition back into your normal business processes. You’ll need to integrate your idea back into your own systems, as most ideas will not live in isolation but as part of a larger organization or community.

Move forward with boldness and thoughtfulness, with urgency and passion and with a renewed sense of purpose and wonder. Congratulations! You have created and implemented a fresh, new idea. Whether it is big or small, you have made a difference. In some way, you have changed the world. ●

## RECOMMENDED READING LIST

If you liked *Disciplined Dreaming*, you’ll also like:

1. ***Innovation X* by Adam Richardson.** Richardson defines a new class of business problems — X-Problems — tough new challenges that thwart conventional planning but present massive innovation opportunities.
2. ***From Concept to Consumer* by Phil Baker.** Baker shows readers how to take an idea and turn it into a successful product, but also prepares them for what happens after the product’s introduction.
3. ***Outsmart!* by Jim Champy.** Champy shares an inside look at the success factors associated with many of the companies that continue to outsmart their competition — even in a tough marketplace.