



Expert Request Form

Name:	Phone:
Role / Function / Business Unit:	

Please fill out this form and return to your Open Innovation (OI) leader. We will help you find experts to speak to.

Before you speak to the expert, please adopt these Best Practices to help maximize value.

- Prepare a Discussion Guide, and send it to the Expert 1-2 days prior to the call
- Make sure Relevant Cross-Functional team members are present during the expert call
- Stop the Call if the expert is not a good fit; let your OI leader know, so we can learn from the experience.
- After 2 calls on a topic, Synthesize Key Learnings and reframe your expert need based on remaining gaps
- Let us know if you need your call recorded and/or transcribed.
- If you can't find experts who meet your needs, contact your OI leader so we can find other ways to help.

Project Request Topic (What do you want to learn, validate, or discuss? Is this General or Niche?):

Objectives & Background of Research (How do you plan to apply your learning/insight? What over-arching business priorities are you working towards?):

Key Questions/Topics for this project (Please develop 3-6 screening questions for your project):

(1) SIMPLE/BASIC QUESTION – if the expert can't answer this, don't bother to speak to them.

(2) KEY QUESTION – if the expert can answer this, you should probably speak to them.

(3) HOLY GRAIL QUESTION – this is the proverbial rainbow unicorn expert. Talk to them NOW!!!

Ideal Contact(s) Background:

- Knowledge of:
- Has worked at (Please list specific companies they may have experience at):
- Functional area skill sets (i.e. R&D, Marketing, Operations, etc.):
- Geography (Country/Region):
- Other:

Ideal Number of Contacts (How many different experts are you hoping to speak with?): default is 2

Timeline (Let us know of any time limitations or preferences): default is 10 days

Output will reach: Cross functional team (Y/N), Senior Leader/Executive (Y/N)

Confidentiality: Yes / No / Not Initially – may disclose during call (Default)

Project & Business Unit Affiliation:

Have any suggested experts? _____