

groopit

## Crowdsolving

Accelerate results with an extended  
team and real-time information



## Table of Contents

Introduction .....	3
Three Main Areas Extended Teams Break Down.....	4
Crowdsolving: What It Is and Why It Matters .....	5
The Groopit Crowdsolving Solution and How It Works .....	6
Five Examples of Crowdsolving .....	9
Corporate Example	
Field Personnel Example	
Government Example	
Medical Research Example	
Mutual Aid Example	
Technology Architecture and Data .....	14
How to Get Started .....	15
The Role of Groopit in Extended Team Success .....	16

The following is intended to explain crowdsolving and outline Groopit general product capabilities. The development, release, and timing of any features or functionality described for Groopits' products remain at the sole discretion of Groopit.



## Introduction

Leaders often fail to solve the complex challenges because of the traditional technologies and strategies they use.

The most challenging problems we face today cross traditional team boundaries. They span departments, disciplines, locations, hierarchies, organizations, industries, and expertise areas. There are a multitude of dependent and independent decision makers. People tackle multiple issues simultaneously, at all levels, over an extended period of time. Progress is dependent upon loosely connected people stepping up at unpredictable moments and taking

unpredictable actions. This is the work of an extended team. It is not linear. It is fluid and complex. It is often hard and slow, but it does not need to be.

David Benjamin and David Komlos wrote in Fast Company, "The most significant challenges leaders face today are complex in nature. They are issues like doubling the growth of a business, transforming a culture, offering a world-beating consumer experience, complying with new legislation, or stemming an epidemic. The problem is that leaders try to solve these highly complex challenges as if they were merely complicated, and that's a problem."

Leaders can overcome these challenges within their organizations by implementing new crowdsolving strategies and software.

Businesses, governments, and organizations can transform how extended teams operate and accelerate initiatives with crowdsolving.

This whitepaper explains why extended teams break down and what crowdsolving is. The paper also provides an overview of the Groopit solution and five use cases to demonstrate how it is used. It concludes with the technical architecture of Groopit and steps to get started.

## Three Main Areas Extended Teams Break Down

Extended teams function and dysfunction differently than traditional core teams. For example, they are not held accountable by any one person, nor are resources controlled by any one hierarchy, so traditional project management and communication methods do not work for this group. Here are three primary points extended teams break down.

**1: Lack of real-time data from the extended team.** The world is moving fast and gathering information from an extended team is generally a slow process. By the time you get the data, the situation and nuances of the problem have already changed. Today information is often gathered through email, channels, and conversations, which yield unstructured, inconsistent information that takes time to transform into meaningful data that can be acted upon. Surveys and pulsing mechanisms collect information retroactively, causing people to recollect what happened after-the-fact yielding latent, less accurate data. Shared spreadsheets are used to capture data on demand, but they are largely neglected and unsecured. As a result, leaders often struggle to gather essential data like frontline accounts of progress and problems. When there is a lack of real-time data from the extended team, progress breaks down.

**2: Lack of shared visibility.** Extended team members are asked to contribute information, but are often kept in the dark. This happens when information is gathered from the extended team, prioritized, filtered, and shared through periodic mass updates. In this scenario the

extended team is deprived of specific and real-time visibility to issues they could act on or progress they could encourage. Lack of visibility also happens when the extended team sees information in streams of unstructured emails, channels, and conversation threads. It takes time for each person to read and discover the important information buried within sentences. What is important gets lost. When extended team members lack visibility, they lose the opportunity to step up. Team members miss chances to tackle a specific issue, invent a new process, create a new strategy, evolve their understanding, or revisit a decision. In order for extended teams to function effectively, members need to step up in unpredictable ways and at unpredictable times. When team members lack real-time visibility, progress grinds to a halt.

**3: Lack of clear direction.** As problems change, extended team member contributions need to adjust accordingly. With traditional systems, direction is typically sent through email where it gets lost or forgotten. Call-to-actions are posted, and old directions continue to be followed when they are no longer relevant. When leaders do not have the ability to direct *and* redirect instantaneously, progress breaks down.

The world is changing fast and so are the nuances of the problems we need to solve. Traditional tools and methods slow down extended teams, leading to breakdowns and failed initiatives. In order to accelerate results, extended teams need the capacity to understand, act and adapt in a fast-changing environment. New technology solutions are needed to make this possible.



## Crowdsolving: What It Is and Why It Matters

Crowdsolving is a new category of software that makes it easy for loosely connected people to work together as an extended team to solve problems.

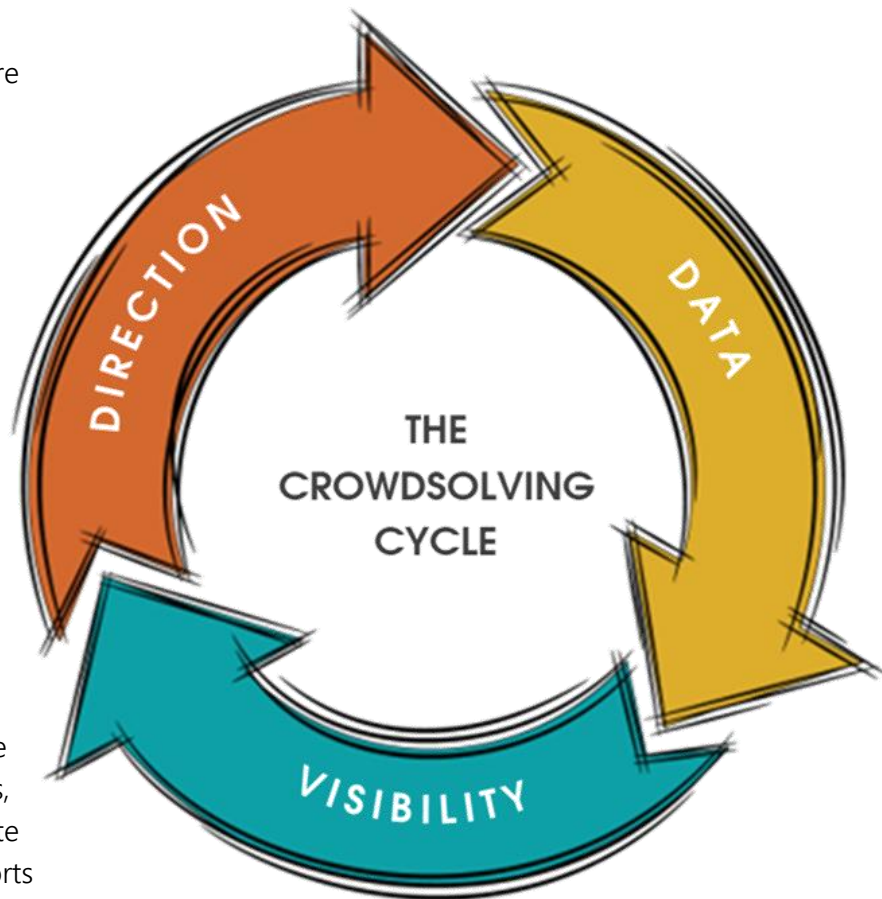
Crowdsolving makes it easy to form an extended team online, collect real-time **data**, give everyone real-time **visibility** into what is happening, and provide **direction** as the situation evolves. It is a cycle that allows people to adapt and work together over an extended period of time.

**For example, the navigation and traffic software application, Waze, uses crowdsolving.** Loosely connected people outsmart traffic together. Everyone knows what data to report – road closures, accidents, and speed traps. They contribute information with a few quick taps. As reports are made, everyone sees the traffic problems and adjusts routes.

Imagine Waze users using email, shared spreadsheets, surveys, and project management tools to outsmart traffic. It would not work, yet that's exactly how extended teams try to work together today.

**Groopit delivers powerful crowdsolving capabilities** to businesses, governments, and organizations. It is a SaaS solution that requires no custom code or development. Leadership can come from anywhere and extended teams can start working together immediately.

**For leaders:** Leaders loosely rely on a multitude of independent and dependent



decisionmakers and stakeholders. With Groopit, they can have clarity and visibility into the moment-by-moment evolution of any endeavor.

**For participants:** Extended team members have countless demands on their time and no tolerance for complexity. With Groopit, they have a clear, simple, and fast way to contribute.

Groopit embraces the complex, nonlinear dynamics of extended teams and uses the crowdsolving cycle to simplify how they work together. Whether ten or ten million people are involved, Groopit opens up new opportunities for success.

# The Groopit Crowdsolving Solution and How It Works

Groopit is a mobile app on iOS and Android and can be used on any computer or mobile phone with a web browser. Groopit also offers an Enterprise Edition designed for advanced multi-group scenarios.

## Define your strategic crowd

Organizers create an online group for the extended team, describe the shared purpose, and why it matters.

## Collect real-time data

Organizers define the information extended team members should proactively report. This is often information that captures progress, problems, and activity.

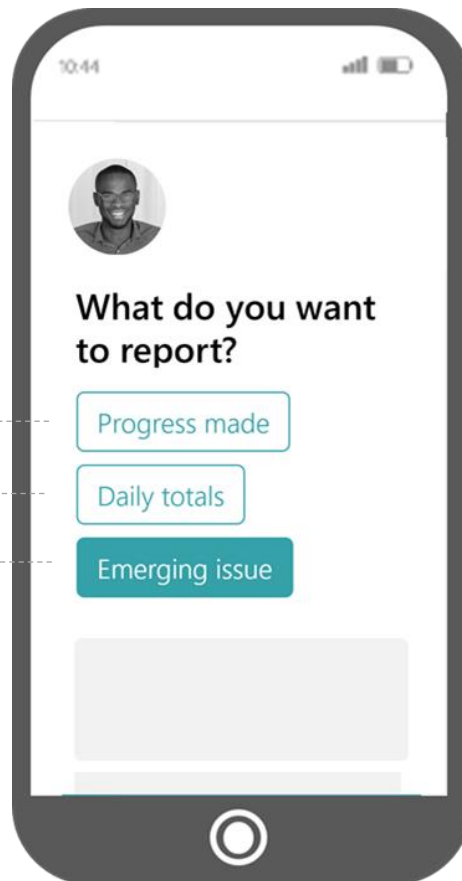
*report progress*

*report activity*

*report problems*

Organizers set up forms to make real-time reporting easy. Extended team members use the forms and with a few quick taps report important information.

Report forms are built by combining data fields. There are eight types of real-time data fields to choose from including tags, location, photos, numbers, dates and times, responses, text, and hidden fields for confidential data.



*report form*



## Emerging issue

Identify potential issues as soon as they arise so that we can anticipate, prevent, and get ahead of them.



### Rapid assessment

Red

Orange

Yellow

White (anticipated)



### Type

Supply chain issue

Equipment malfunctioning

Policy-related challenges



### Location

Denver, CO, USA



### Overview

Cancel

Report

## Provide shared visibility

Extended team members automatically see a feed of all reports made in the group.

Organizers set up views to display aggregate data on a map, progress counter, goal meter, and more advanced view options in the Groopit Enterprise Edition.

Team members can comment on reports, @mention people (to notify someone who has been mentioned), respond to sign-ups, plus filter and search for specific information.

## Redirect the extended team

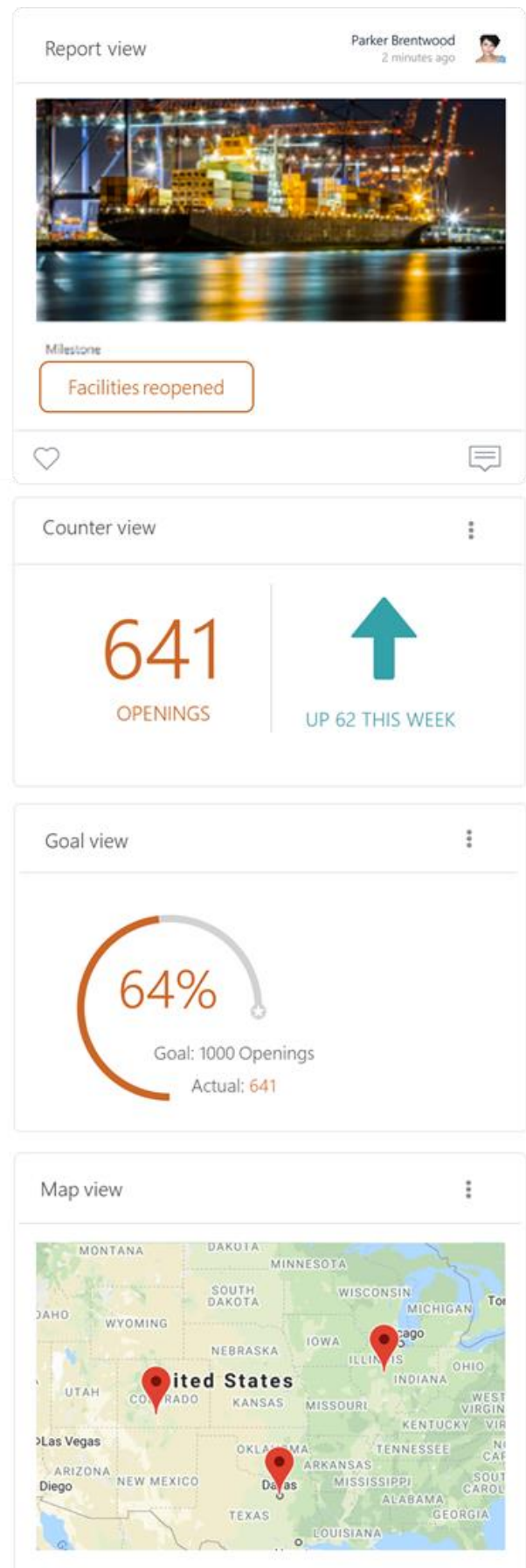
Organizers direct and redirect the team by making report forms active and inactive. When it is time to redirect people, organizers activate a new form, pin it to make the direction visible, and send an alert to team members. Organizers have visibility to last member activity, so they always know who is engaged and who might need an additional nudge.

## Manage membership

Organizers control membership by inviting or importing members, accepting requests to join private groups, or by allowing open membership to public groups.

## Access data

Organizers have access to all data reported, can download the data, or use an API to integrate the data into existing enterprise systems such as Salesforce, Tableau, Power BI, Slack, Teams, and more.



### **Add multi-group enterprise capabilities**

When solving big problems, scope is critical. Leaders at all levels need both a frontline view and a big picture view where they can see all the variables that affect the situation.

Groopit enterprise crowdsolving capabilities allow leaders to centralize data, visibility, and direction. It also enables decentralized teams to work independently.

For example, Groopit Enterprise Edition allows:

**Retailers to enlist store managers** from a single region to work as an extended team and replicate the model across thousands of geographies.

**Manufacturers to enlist plant operators** in the U.S. to work as an extended team and replicates the model across countries.

**Pharmaceutical companies to enlist staff across clinical trial sites** to work as an extended team and replicate the model across drug trials.

**Medical researchers to enlist patients, families, and caregivers** to work as an extended team and replicate the model across every patient.

**Cities to enlist residents** to work as an extended team and replicate that across every apartment building, cultural center, church, school, and retirement center.

**Governors to enlist hospital administrators** in their state to be part of an extended team and replicate that across the United States.

Groopit Enterprise Edition advanced multi-group capabilities allows an administrator to define the structure for extended teams, replicate, link, manage, and collect data across multiple groups. This unique capability provides leaders with the opportunity to see the big picture of progress and problems across an enterprise.

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situation.

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## Corporate Example

A corporation ramping up manufacturing to full production levels after COVID-19 closures, uses Groopit to expedite recovery.

Managers at every site are equipped with Groopit and use it to report real-time data. They report absentee rates, problems with social distancing on the production floor, and employee reactions to emerging policies and practices.

Corporate headquarters defines the data needed and sets up forms to simplify real-time reporting. For example, the form that is set up to capture social distancing problems on the manufacturing floor makes it easy to take a photo of what's happening, add location, tag the problem type, urgency level and status, plus add a short description of the situation.

Managers see a feed of reports from site managers in their region, allowing them to help each other solve specific problems in the moment.

Company-wide administrators have visibility into what is happening across regions, allowing the corporation to quickly identify emerging problems and progress, and use the information to shift priorities or policies. Select data is integrated into an executive dashboard on Tableau, giving the CEO a custom feed of employee generated data.

As manufacturing challenges change, corporate headquarters creates new forms and retires old ones. This ensures managers are only and always contributing the most relevant data, allowing everyone to focus and make concrete progress that is both relevant and timely.



### Distancing challenge in plant

Whenever social distancing is challenging on the manufacturing plant floor, capture it here so we can understand the problems that need solving.



Photo (+)



Location



Problem type

Policy

Equipment

Suppliers

Employees



Level of urgency to find a solution

Yellow

Orange

Red

Green (solution put in place)



Description

Cancel

Report

## Field Personnel Example

A business providing pet dental services to hundreds of veterinarian hospitals uses Groopit to get field personnel working together.

Field technicians are equipped with Groopit and use it to report real-time data from the field. They report details about every service rendered, services declined along with the reason, and questions about the challenges they face.

The business defines the data needed and sets up forms to simplify real-time reporting. For example, the form that is set up to capture services rendered includes before and after photos, the exam date, dog breed, services performed, recommended follow-up, plus a text field to add information. Once this information is captured, field technicians can send a copy to the pet owner and the veterinarian clinic associated with the service.

Field technicians and the business owner sees a feed of all reports made. This allows them to help each other and solve specific problems as they arise, even though they seldom have the opportunity to see or talk to each other.

The business owner has immediate visibility into what is happening in the field, allowing them to commend people for their good work, identify missed opportunities, and efficiencies. Services rendered data is received in real-time, does not have to be manually entered, and is integrated into existing systems for billing and customer records.

This same approach can be used by field sales and other loosely connected field personnel.

A smartphone screen showing the Groopit app interface. At the top, there's a status bar with the time 10:44 and battery level. Below that is a profile picture of a woman. The main heading is "What do you want to report?". There are three buttons: "Teeth cleaning complete" (highlighted in teal), "Patient declined", and "A question: what would you do?". Below these is a feed item titled "Teeth cleaning complete" by "Parker Brentwood" 2 minutes ago, with a small photo of the dog being examined.

### Teeth cleaning complete

Every time you complete a non-anesthetic teeth cleaning, report the details here and send them to the hospital.



Patient photo +



Patient name



Exam date



Breed ▼



Services performed

Hand scaled

Polished

Oral Rinse

Flushed Packets

Charting

Discharge instructions

Ultra-sonic scaled



Recommended follow-up

Further evaluation

## Government Example

A government leader who needs to know what is happening across local hospitals can use Groopit to accelerate information sharing and problem-solving.

Every hospital administrator is equipped with Groopit on their mobile phone and computer and uses it to quickly report real-time data.

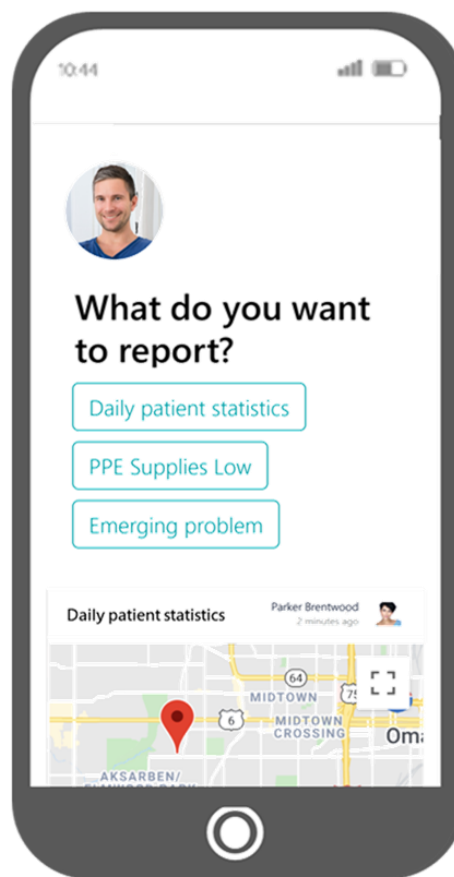
The government agency defines the data needed and sets up forms to simplify real-time reporting. The data needed includes number of COVID-19 patients newly admitted, discharged, died, PPE shortages, emerging problems and observations about severity or progression. For example, the form set-up to report deaths includes total daily quantity, plus deaths by cause so that there is an accurate total number as well as discrimination between COVID-19, other causes, and how they might relate.

Hospital administrators see a feed of reports from hospitals in their region, allowing them to step up and help each other solve specific problems, in the moment.

The government agency has real-time visibility into what is happening across hospitals, allowing them to quickly see progress, identify emerging problems, and use the information to shift priorities or policies.

As challenges change, the government agency creates new forms and retires old ones. This ensures hospitals are only and always contributing the most relevant data, allowing everyone to focus and make concrete progress that is both relevant and timely.

This same approach can be used for COVID testing, small business revitalization, PPE manufacturing, contact tracing, and more.



### Daily patient statistics

Report patient statistics daily so that we can all see trends across our region.



Daily report date



Daily summary (Rate of new COVID patients and COVID deaths)

Red (both rates increasing)

Orange (one rate increasing)

Yellow (both rates flat)

Blue (one rate declining)

Green (both rates declining) 



# new COVID positive patients



# new COVID positive employees



# discharged COVID patients



# deaths (COVID+other)



# deaths (COVID only)



Location



## Medical Research Example

A foundation studying chronically ill patients uses Groopit to accelerate their research and improve patient outcomes.

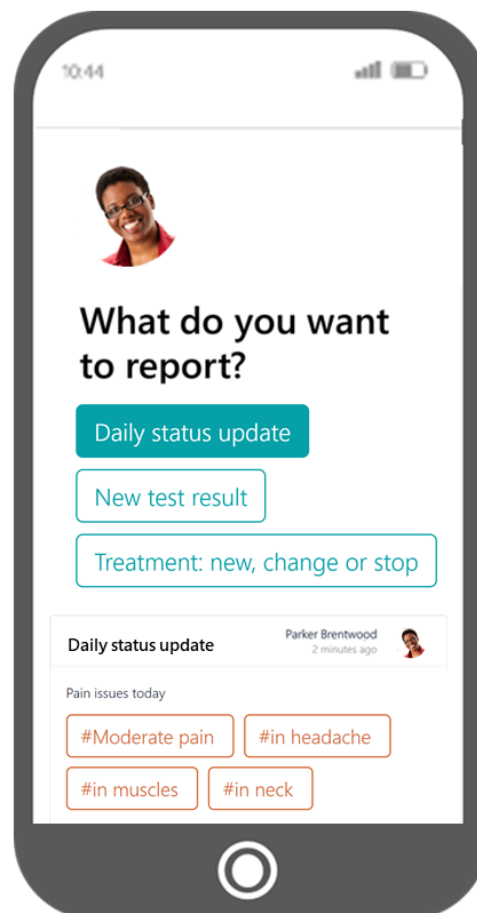
Every research participant is equipped with a private Groopit on their mobile phone and computer to capture data in real-time.

The research foundation defines the data needed and sets up forms to simplify real-time reporting. The data includes severity of disease specific symptoms, at-home test results, and changes in care. Patients may invite family members, in-home caregivers, and key people involved to also report, increasing the ability for a multitude of real-time observations in the patient care cycle.

As reports are made, members see a feed of reports in their private group and have visibility into what is happening so they can solve specific problems or add observations.

Research administrators have visibility into what is happening across patients. The administrator can use an API and follow HIPAA compliant policies to integrate reported data into the research institution's systems for analysis and study. This allows researchers to identify patterns more quickly and use the rich data to further their research.

As research progresses, the administrator can set-up additional forms to explore new clues. Using Groopit, researchers capture real-time data directly from patients and their caregivers, increasing primary patient data and improving data accuracy to accelerate findings.



### Daily status update

Keep track of how you are doing every day.



Date



Pain issues today

Light pain

Moderate pain

Severe pain

in headache

in muscles

in joints

in neck

in back



Neurological issues today

Loss of balance

Dizzy

Vision problems

Forgetfulness

Difficulty making decisions

Numbness

Tingling

Muscle twitches



Temperature (F)



## City Mutual Aid Example

A nonprofit who wants to make sure every neighbor is cared for during the COVID-19 crisis, uses Groopit to coordinate community and city-wide response.

Every community is equipped with a private Groopit so they can organize where trusted relationships already exist - apartment building, condominium complex, housing association, church, cultural center, and retirement community. Residents use Groopit on their mobile phones and computers to share data in real-time.

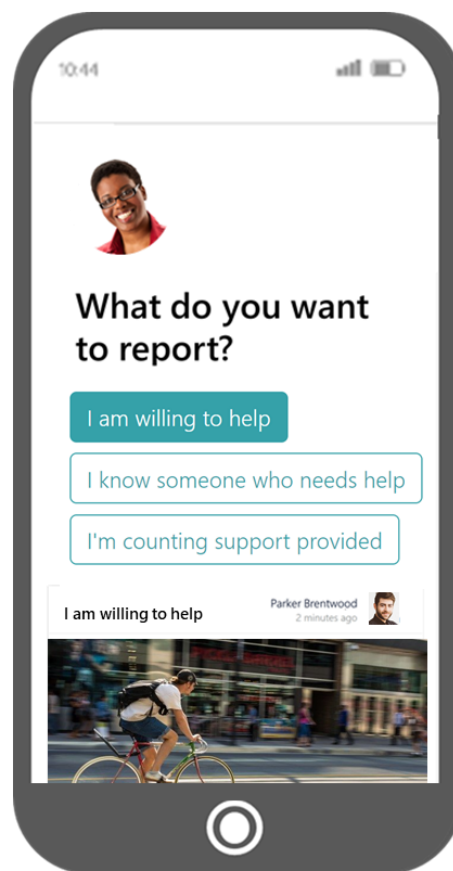
The city-wide administrator defines the data needed and sets up forms to simplify real-time reporting. The data includes who can help, who needs help, and what help is provided.

As reports are made, members see a feed of reports in their private group and have visibility into what is happening so they can solve specific problems as they arise.

The city-wide administrator has visibility into what is happening across communities. This makes it easier to identify emerging patterns and problems, use the information to shift resources from one community to another, and inform city-wide priorities.

As challenges change, the administrator creates new forms and retires old ones. This allows communities to adapt so that they are always contributing the most relevant information and making progress.

As the COVID crisis unfolds, the challenges a city and its residents face will change month to month, sometimes week to week. Groopit makes it easy for communities to adapt so that people are always contributing in the most impactful ways and making progress at a city-wide level.



### I am willing to help

If you are willing to help, put your hand up so your neighbors know they can call on you.



Name



Willing to

Grocery shop

Pick up medication

Run an errand

Problem solve

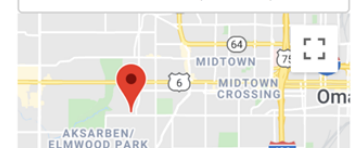
Be someone to talk to

Sew



Location

5412 Leavenworth St, Omaha, NE 681



Additional information

Cancel

Report

## Technology Architecture and Data

The Groopit SaaS solution is built on the Microsoft Azure cloud computing platform. This allows Groopit to leverage Microsoft's security, reliability, scalability, availability, and storage. Groopit takes data processing and security very seriously.

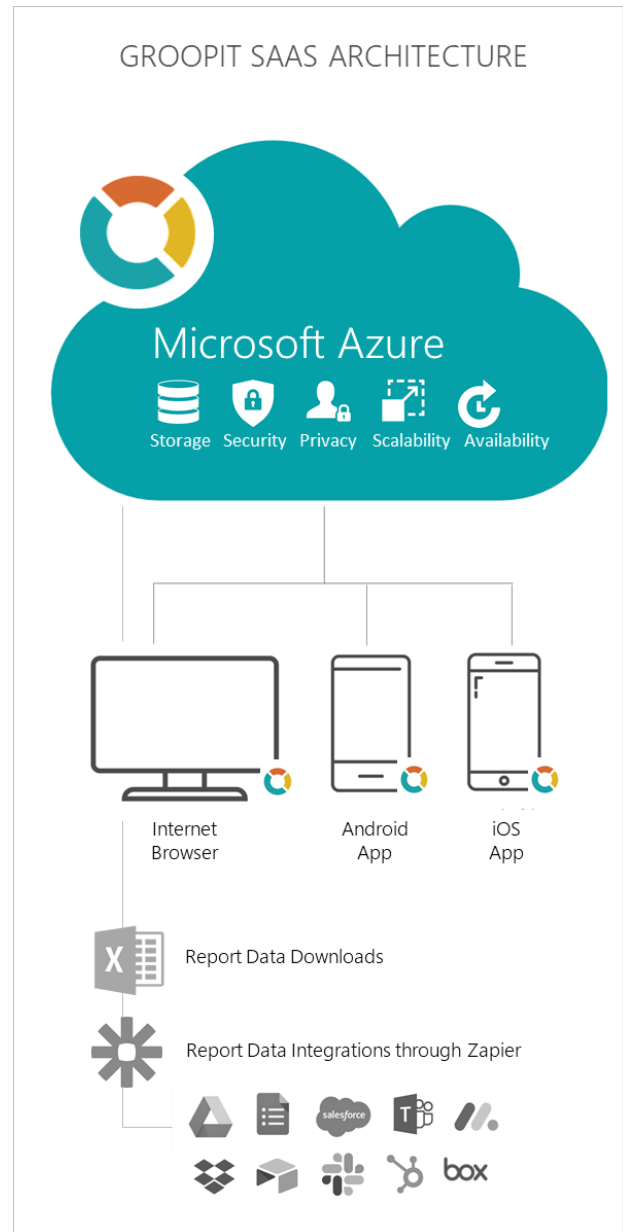
**Data storage.** All data is securely stored in Microsoft data centers, uses Microsoft's security features, and abides by Microsoft standards. We value Microsoft's commitment to security and building Groopit on their platform reflects our commitment as well.

**Data privacy.** Groopit does not sell user data. We believe that users own their data and Groopit does not have the right to sell it. Groopit is a subscription-based service, and user data is not sold or monetized by selling it to advertisers.

**Data policy compliance.** Groopit Enterprise Edition allows administrators to follow GDPR and HIPAA compliant data collection.

**Data collection.** Groopit facilitates data collection through reporting, just as a survey provider facilitates data collection through surveys. Groopit suggests that organizations follow best practices for data collection. Many organizations are regulated by data privacy laws and regulations, as well as internal policies. Organizers should ensure that they are familiar with these policies, as they will be responsible for ensuring the organization's data collection complies with these requirements.

**Data access and analytics.** Groopit allows organizers to integrate data into existing data



analytics tools used within the enterprise. Businesses have invested billions of dollars in data analytics solutions; Groopit is not a data analytics solution. Groopit digitizes human insights that can feed into existing data analytics solutions. This is achieved through a Zapier API that facilitates data integration into thousands of applications of your choice including Tableau, Microsoft Power BI, Salesforce, Slack, Teams, and more.

## How to Get Started

How do you know when it is appropriate to apply crowdsolving? When any of the following conditions exist, it is an opportunity to improve performance with crowdsolving:

- If the number of people who have important information needed to solve problems passes a threshold for convenient, easy telephone and email updates.
- If the people needed to solve a problem or accomplish a strategic initiative are working in different functions with different priorities.
- If leaders are making decisions with old information when things are changing rapidly.
- If leaders are making decisions with information provided by people with different agendas.
- If transparency of data is critical to increase understanding and trust.
- If specific data needs to be pulled from specific groups and integrated into the larger picture for higher-level and lower-level leaders to make good decisions.
- If a leader explores specific lines of thinking and, when doing so, wants instant input to inform the direction.

**Keep it simple.** How do you proceed?

Extended teams have zero time or tolerance for complexity, so one of the most important things to remember is to keep it simple. Groopit was explicitly designed to make something complex remarkably simple

The most important step in getting started is for a leader to answer three important questions and strive to keep it simple:

**1 Define the challenge.** What is the challenge you want the extended team to take on? You might state the challenge as a problem to solve, a strategic initiative, a shared purpose or goal.

**2 Define the information needed.** What is the information that you and everyone on the extended team needs to make progress? You might think about this in terms of defining the problems, progress and activity that should be surfaced in real-time.

**3 Define the extended team.** Who are the people who should be on each extended team? You can think through who will have the information needed, as well as who will need to understand or offer support.

**Set up your Groopit.** The next steps set up the real-time infrastructure for your extended team. These steps are easy; they do not require custom code, development, or technical expertise. The steps can be completed going to [Groopit.co](https://groopit.co), creating an account, and following the instructions to:

- ☐ Start a group
- ☐ Set up report forms for data collection
- ☐ Invite or import the extended team

### Crowdsolving Experts Standing By

Once you have answers to questions 1, 2, and 3, Groopit experts are available to help you fine-tune your strategy and set-up report forms. Request a one-hour working session and, at the end of the hour, your Groopit will be ready to go. There is no fee, no risk, and no downside. Request a working session by sending email to [hello@groopit.co](mailto:hello@groopit.co).

## The Role of Groopit in Extended Team Success

An extended team is complex; there are many dependent and independent decision makers, including yourself.

**Leaders and initiatives fail** when the problems they are solving move faster than their extended team can move. That is exactly what happens when traditional strategies and technologies are used. The work of an extended team breaks down when there's a:

1. Lack of real-time information from the extended team
2. Lack of real-time shared visibility
3. Lack of real-time direction

**Crowdsolving gives leaders a new opportunity** to conquer these challenges and get results that have never before been possible. Leaders now have what they need to get loosely connected people working tighter, with Groopit.

**Groopit was founded to empower leaders** all over the world to tackle their

most audacious goals by enlisting extended teams. Groopit Enterprise Crowdsolving Software takes what has always been complex behind-the-scenes and simplifies it for everyone.

Tammy Savage, Groopit CEO and co-founder, became obsessed with understanding why and where extended teams break down. She studied the most intense problems where extended teams were essential – the prevention of crime and terrorism, recovery after a disaster, and outbreaks of infectious disease. Her mission was to understand why and where extended teams break down, and what keeps them from doing their best work. The aim of her research was to determine if there was missing technology infrastructure that prevents extended teams from achieving results.

What do you aspire to achieve? Who needs to be on the extended team? Do you want progress in record time? Groopit stands ready to help.

**Start #Crowdsolving Today**

