

Leading impactful research: applying platform thinking to drive collaborative inquiry in the innovation field

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Abstract

Purpose – This study investigates the application of collaborative inquiry within innovation management, employing platform thinking to address challenges of generalizability and relevance. The aim is to integrate Collaborative Inquiry methods, characterized by participatory, diffuse, and reflective practices, to transform research into a tool for impactful change in organizations in the field of innovation management.

Design/methodology/approach – A longitudinal participatory case study approach focuses on the IDEaLs case—a research platform that collaborated with multiple companies over several years. The data gathered and analyzed comes from the research project within the research platforms over the first two editions and from the research platform management and coordination activities.

Findings – The study introduces the Collaborative Research Platform Approach (CRPA), demonstrating its effectiveness in addressing typical constraints of traditional research methodologies through a real-world application within the IDEaLs case. The findings highlight the CRPA's potential in fostering a dynamic, co-creative research environment that bridges theoretical knowledge with practical applications, thus enhancing both scholarly and organizational outcomes while pursuing a future change within the organizations.

Research limitations/implications – There are two main research implications. First, it proposes platform thinking as a theoretical lens to read a multi-stakeholder phenomenon in the research domain, confirming its nature of value-creation mechanisms, using it outside the business model and strategic space. Second, it offers a methodological contribution by presenting the CRPA framework.

Practical implications – The CRPA framework offers organizations a structured approach to managing collaborative research projects that align with both academic rigor and practical relevance. Companies engaged in the study reported enhanced ability to implement actionable insights from research, influencing real-time decision-making processes.



Social implications – By fostering collaborative engagements across multiple stakeholders, the CRPA promotes a research culture that values inclusivity and practical impact, potentially leading to broader societal benefits through improved innovation management practices.

Originality/value – This paper contributes to the innovation management field by proposing the CRPA, which integrates principles of Platform Thinking with Collaborative Inquiry. This novel approach is designed to improve the applicability and scope of innovation research, offering a robust framework that enhances engagement and utility across academic and business domains. It uses platforms as a theoretical lens to read a multi-stakeholder environment in the research domain.

Keywords Platform thinking, Research platform, Action research, Collaborative management research, Design science research

Paper type Research paper

1. Introduction

Innovation inherently evolves and challenges data collection and experimentation due to its inherent novelty and the creation of emerging knowledge structures. Innovation is compounded by unpredictable variables from human resources to environmental uncertainties (Frenken, 2006; Chae, 2012). This dynamic unpredictability has heightened in our rapidly changing world, prompting calls for novel methodologies tailored to innovation's unique demands (Biemans *et al.*, 2016). Despite criticisms of being overly descriptive and borrowing theories from broader domains (Crossan and Apaydin, 2010), innovation research has predominantly leaned on retrospective case studies (Goffin *et al.*, 2019) and surveys (Sauermann and Roach, 2013), methods that, despite their longitudinal insights, come with biases and limitations due to their past-oriented nature (Perks and Roberts, 2013). Indeed, academics have long lamented that the process of theory construction “is hemmed in by methodological strictures that favor validation rather than usefulness” (Weick, 1989, p. 516). Moreover, traditional methodological approaches in the social sciences focus on data sourced from observable events that have already occurred (Bell *et al.*, 2022). This aims to have “the emergence of theory from data” (Eisenhardt *et al.*, 2016, p. 114), focusing on theorizing from the past and present. These observations highlight how traditional methodologies are challenged in a world that is constantly changing: studying today what happened yesterday will make less and less sense because tomorrow they will already be different (Reinecke *et al.*, 2022).

At the same time, other methodological approaches are emerging in various disciplines. Collaborative inquiry, a method emphasizing participatory, diffused, and reflective research for actionable insights (MacLean *et al.*, 2002; Shani *et al.*, 2023; Adler and Styhre, 2004), emerged mainly in organizational studies, and we believe it can open research opportunities in innovation studies. This approach can enrich innovation research by fostering rigorous, relevant investigations that produce impactful outcomes. The collaborative inquiry might ensure research rooted in the present, studying innovations and environmental changes as they emerge for a more real-time inquiry. This approach is coherent with the emerging calls for a different type of research that aims to work on the future rather than on the past, helping individuals and organizations make sense of the present and understand how to move toward the future (Gümüşay and Reinecke, 2024).

Methodologically speaking, collaborative inquiry seems promising even in solving the tradeoff between theoretical relevance and practical impact through unlocking a third way. Moreover, it aims to overcome the limitations of traditional methods like case studies and surveys, which naturally deal with past events to project their effect on the future instead of helping organizations and individuals embrace change through direct behaviors targeting the future.

Our study explores the effective application of collaborative inquiry within companies, with the double goal of bridging research and practice while developing theoretical implications for future studies looking ahead.

Taking an inductive approach, we present and critically analyze the case of IDeaLs (Innovation and Design as Leadership). IDeaLs is a research platform rooted in collaborative inquiry, which aims to advance theory and practice at the intersection of Action Research, Collaborative Management Research, and Design Science Research. IDeaLs, in short, is a research platform that brings together various organizations to explore – through collaborative inquiry – edge research questions in innovation management. Methodologically speaking, we approach this study as a longitudinal participatory case study to present the direct experience of the authors in developing a different methodological approach that takes into consideration the need to work on connecting theory and practice and the willingness to work on the future rather than on the past. This approach contributes to academic discourse and offers managers pragmatic insights for fostering collaborative research with immediate organizational impact. The definition of a “research platform,” considering IDeaLs a basic architecture upon which organizations and researchers collaboratively build research projects, opens this paper’s path, which aims to explore the nexus between collaborative inquiry and platform thinking.

Platform Thinking (Trabucchi and Buganza, 2023) has become a central approach in driving significant innovations through digital technologies for start-ups like Airbnb and Uber and established firms looking for digital business transformation (Kenney *et al.*, 2021). Conceptually, platforms facilitate various kinds of collaboration and co-creation among diverse actors, which makes them potentially coherent with collaborative research approaches. This paper investigates how Platform Thinking can enhance collaborative inquiry in innovation management. We propose the Collaborative Research Platform Approach (CRPA), a framework for establishing a research platform that fosters co-development between researchers and organizations, benefiting both scholarly and practical realms.

This research has two main implications. From a theoretical perspective, this paper links the growing literature on platforms to the research domain, proposing platform thinking as a theory to read reality and value creation mechanisms in a multi-stakeholder environment, moving away from the classical business model and strategic perspective to enter the research methodologies domain. Moreover, this study has methodological implications that deal with the definition of the Collaborative Research Platform Approach, which represents a novel research approach to develop impactful, theoretically relevant, and practically useful research by directly collaborating with organizations, gathering comparable data from multiple firms while promoting direct change in the organizations.

2. Literature review

2.1 Collaborative inquiry main paradigms: action research, collaborative management research, and design research

Research within the management domain traditionally encompasses a variety of methods that form the backbone of innovation research, including case studies and surveys, noted as Mode 1. This paper delves into the alternative paradigm, namely Mode 2, focusing on the primary Collaborative Inquiry methodologies to illustrate their unique capabilities in promoting rigorous and impactful research within the innovation sphere and their inherent limitations. We concentrate on Action Research (AR) and Collaborative Management Research (CMR) as the predominant methodologies in management, along with Design Science Research (DSR), which is more prevalent in the Information Systems field, for their alignment with the innovation landscape.

Action Research (AR) merges applied behavioral science knowledge with existing organizational insights to tackle real organizational challenges. It aims to foster change

within organizations by enhancing self-help competencies among organizational members and contributing to scientific knowledge. As an evolving, collaborative process, AR integrates a dual role for scholars as researchers and change agents, facilitating knowledge production within the application context. This method champions a data-driven approach, enabling the examination of causality and the robustness of relationships through collaborative evaluation. As such, AR emphasizes change and leverages a continuous exchange of opinions, knowledge, and information among participants (Coghlan, 2011; Rapoport, 1970; Pasmore *et al.*, 2008).

Collaborative Management Research (CMR) signifies a joint effort by researchers and practitioners to explore how managerial behaviors, methods, and organizational arrangements impact outcomes. It steers clear of controlled experiments, preferring to test models in real-world settings. CMR is characterized by cyclical-sequential phases, starting with a conversational inquiry to develop a shared understanding that informs organizational actions and the co-generation of actionable knowledge. This approach focuses on dialogic organizational development, aiming to acknowledge and learn from diverse perspectives while generating influential and immediately applicable knowledge. The quality of CMR studies is assessed based on rigor, reflectiveness, and relevance, encompassing several critical elements such as purpose, context, methodology, data collection design, event narration, and theoretical extrapolation (Pasmore *et al.*, 2008; Coghlan *et al.*, 2012).

On the other hand, design Science Research (DSR) is dedicated to creating artifacts or solutions to solve real problems, thereby bringing researchers and organizational members closer together. It aims to generate helpful knowledge across various disciplinary areas through a systematic process that guides the construction and evaluation of design artifacts. DSR is concerned with developing satisfactory solutions that can be generalized to a class of problems rather than pursuing optimal solutions. This approach is underpinned by the design-science paradigm, which seeks to extend human and organizational capabilities by creating innovative artifacts (Hevner *et al.*, 2004; Hevner, 2007).

The three approaches are summarized in Table 1.

Despite the valuable insights offered by these methodologies, they also present significant challenges, primarily due to their highly contextual nature. This specificity can lead to biases or company-specific insights, raising concerns about the generalizability of the findings. The depth of analysis and the applicability of results in related settings often necessitate validation studies to confirm the robustness and relevance of the findings. Furthermore, these methodologies may inadvertently focus on company-specific issues or pilot projects, potentially neglecting broader implications for the management research field (Börjesson and Elmquist, 2011; Park *et al.*, 2020; Coghlan, 2019).

2.2 Framing platform thinking as a research collaboration tool

The concept of “platform” in the innovation sector originated in the 1980s, denoting firms that developed multiple products from a single, shared architecture, enabling the creation of derivative products (Wheelwright and Clark, 1992; Meyer and Lehnerd, 1997). Gawer and Cusumano (2014) described these as “product platforms” confined to use within their creating organizations, exemplified by Sony’s Walkman and various automotive platforms. The technology sector later expanded this concept into “industry-wide” or “innovation” platforms, where external actors could develop offerings atop the foundational platform, with operating systems like MacOS, Windows, iOS, and Android serving as prime examples (Cusumano *et al.*, 2019). These initial platform concepts focused more on technological product or service development than fostering value-creating actor relationships.

In recent years, multi-sided platforms have surged in popularity, evolving from the economic principle of “two-sided markets” (Rochet and Tirole, 2003) and becoming the most

	Action research	Collaborative management research	Design science research
Essence (ontology)	* "Action" and "intervention"	* "Collaboration" and "intervention"	* "Collaboration" and "design of artifacts" to solve a real problem
Why	* Enabling a system change and/or supporting new initiative * Research interest	* Investigating a "red and hot" management and research topic of mutual interest	* Investigating a problem, identification of possible artifacts to address the problem, design development and evaluation of the selected artifact
Context	* Wide variety of organizations and loosely coupled organizations * Initial interface with members at all levels	* Business context with complex and competitive business environment * Initial interface with senior management	* Originally information systems, generally organizational issue * Initial interface with a client/system
Role of the researcher	* Possible ongoing engagement with senior management * Facilitating the inquiry process * Facilitating the ongoing learning process	* Ongoing engagement with the senior management * Maintaining the balance between involvement and detachment of senior management * Facilitating the mutual education and inquiry process	* Identifying the problems and requirements * Proposing possible artifacts to be tested * Identifying possible contributions to knowledge creation derived from the design cycle
Structuring the research	* Laying the foundation for a learning system * The learning system can take wide variety of shapes and forms	* Project design orientation * Exploration and designing alternative learning mechanisms to carry out the study	* Design orientation * Exploration and evaluation of alternative testing them in the real environment
Data generation/ collection	* Exploring wide variety of data collection tools and processes * Choosing the most appropriate data collection tools and data collection process	* Exploring wide variety of data collection tools and processes * Choosing the most appropriate data collection tools and data collection process and involvement of senior management with final decision	* Testing the artifact in the real environment * Choosing the most appropriate data collection tools and data collection process according to the problem and the artifacts' characteristics
Interpretation of data	* Research team reviews raw data and create shared meaning of the data and identify possible action steps	* Study teams review raw data and create shared meaning of the data and identify possible action steps * Management team reviews study teams work, reviews raw data, creates shared meaning of the data and advances action items and next steps	* Research team reviews raw data and create shared meaning of the data and identify possible action steps

Table 1.
Main collaborative inquiry paradigms

Source(s): Authors' own creation



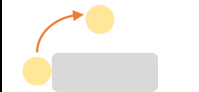
prevalent platform model. Unlike their predecessors, multi-sided platforms primarily aim to connect various actors to facilitate value-generating services for all involved rather than concentrating solely on technological advancement. Amazon exemplifies this, serving two customer groups—buyers and sellers—and leveraging cross-side network externalities to enhance value perception among these groups, thereby increasing the platform’s overall appeal (Katz and Shapiro, 1985; Muzellec *et al.*, 2015).

The essence of multi-sided platform management lies in orchestrating actor relationships, as platforms hold no inherent value without participant engagement, illustrated by examples like Airbnb and Uber, which depend on end-users and service providers (Trabucchi and Buganza, 2022). Multi-sided platforms encompass diverse models, including transactional platforms like Amazon, facilitating direct actor interactions and bi-directional network effects; orthogonal platforms employing a Client-as-a-Target (CaaT) strategy, like Google, where cross-side network effects are mono-directional and advertisers pay for user attention; and orthogonal platforms with a Client-as-a-Source (CaaS) strategy, where one side benefits from data or insights derived from the other, such as research centers using Twitter data (Trabucchi and Buganza, 2023; Trabucchi *et al.*, 2017).

These platform models share common challenges, including the necessity for multiple value propositions tailored to each participant side, adding complexity to the platform’s value design, and the “chicken and egg” paradox, highlighting the difficulty in establishing platform value without initial participant sides, complicating the startup phase (Caillaud and Jullien, 2003; Stummer *et al.*, 2018; Muzellec *et al.*, 2015; Trabucchi *et al.*, 2022b). A summary of the various typologies is in Table 2.

3. Method

To explore the nexus between collaborative inquiry and platform thinking, we adopted a longitudinal participatory single case study methodology with an exploratory purpose recognized for its suitability in thoroughly examining contemporary phenomena within their

	Type of platform	Definition	Examples
	Transactional (two or multi sided) platform	A system with two or more sets of customers that enable a direct transaction between the sides generating cross-side network externalities	Airbnb, Uber, Credit cards, the market
	Orthogonal (two or multi sided) platform with a client-as-a-target strategy	The demand or first side is the target for advertising messages coming from the second (orthogonal) side, generating unidirectional cross-side network externalities	Newspapers, Google, Instagram
	Orthogonal (two or multi sided) platform with a client-as-a-source strategy	The demand or first side is the source of data that, aggregated and anonymized, can be used by the second (orthogonal) side, generating unidirectional cross-side network externalities	Strava, Twitter

Source(s): Authors’ own creation

Table 2.
Main typologies of
platforms (based on
Trabucchi and
Buganza, 2022)

real-life contexts (Yin, 2013). Our case study focuses on IDEaLs, a research platform designed to foster collaboration between scholars and practitioners with the dual aim of contributing to both knowledge and practical application. IDEaLs is dedicated to integrating scientific research into actionable outcomes, working alongside partner companies to address real-world challenges within their organizations, thereby narrowing the “rigor-relevance gap.” This initiative stands out for its successful implementation of Collaborative Inquiry research, evidenced by its tangible impact on participating companies and its contribution to innovation knowledge. The uniqueness of IDEaLs stems from its inclusive engagement with a diverse range of stakeholders across various industries, facilitating a comprehensive examination of the observed phenomenon, theoretical exploration, and empirical validation (Pettigrew, 1990; Siggelkow, 2007).

The development of this paper is a collaborative endeavor by authors who played an integral role in the platform’s inception, employing a longitudinal research design to gather data through assorted methodologies over the specified period. The authors’ active participation in project meetings facilitated the collection of systematic and detailed notes, which were meticulously reviewed and discussed among the researchers, ensuring a rich compilation of observations and personal insights crucial for theory elaboration (Börjesson and Elmquist, 2011). Table 3 presents a detailed account of the data sources utilized by the authors during the initial two years of IDEaLs’s operation.

In the data analysis phase, the authors leveraged their contextual knowledge to interpret the extensive and rich data set to provide a coherent narrative of the entire process. The theory development process was iterative, with ongoing analysis during fieldwork, enabling the authors to continuously juxtapose emerging findings against existing theories to refine and expand them (Shani *et al.*, 2004). This approach enriched the theoretical framework and underscored the dynamic interplay between theory and empirical evidence, illustrating the CRPA framework’s effectiveness in bridging theoretical knowledge with practical application.

4. Results: the IDEaLs research platform

Launched in 2017, IDEaLs is a research platform that has spanned three years of research activity, with this study concentrating on its initial two years, as depicted in Figure 1. This period marks the formative and operational phases of IDEaLs, from its inception in 2017 to the culmination of this phase at the end of 2020, during which IDEaLs evolved into a permanent and continuous research entity. Central to IDEaLs’s structure are two principal groups of participants: a steadfast Research Team and the partner companies involved in the initiatives.

The Research Team is tasked with steering the platform’s research direction over the years. Their responsibilities encompass defining research questions, designing and developing research methodologies, and overseeing the exploitation and dissemination of research findings. Conversely, the partner companies engage with IDEaLs on a contractual basis, with agreements typically spanning one year. These agreements allow for annual renewal, allowing companies to extend their collaboration based on the partnership’s value and outcomes.

Throughout the collaboration year, partner companies and the research team embark on specific projects focused on innovation challenges, particularly strategies to foster employee engagement in innovation processes. The Research Team’s role is collaborative, working closely with each company to address the posed challenge (“how to engage people to make innovation happen”). This collaboration covers all phases of the research year, from the initial setup and design of the project to its development and the final delivery of outputs. This comprehensive approach ensures that each project addresses specific innovation

	Type of data	Use in the analysis
Year 1 (2018–2019)	Meetings among Research Team members: (200 h) <ul style="list-style-type: none"> ● Notes ● Materials/slides produced for the meetings 	Support, integrate and triangulate evidence from observations and workshops' activities Integrate observation to improve our understanding about research development
	Design Meetings with companies to design the research (80 h) <ul style="list-style-type: none"> ● Notes ● Materials/slides produced for the meetings 	Familiarize with the organizational context, values and languages Support, integrate and triangulate evidence from observations and workshops' activities Integrate observations to improve our understanding of projects' related decision
	Physical Workshops to exploit the research (100 h) <ul style="list-style-type: none"> ● Field Notes ● Written posters and post-it from the sessions ● Materials/slides produced for the meetings 	Familiarize with the organizational context, values and languages Support, integrate and triangulate evidence from observations and workshops' activities Keep record of the outcome of practices that members engaged in during the projects (e.g. specific jargon, sketching) and share it with the other authors Investigate specific research questions
	Physical community event (20 h) <ul style="list-style-type: none"> ● Field Notes ● Written posters and post-it from the sessions ● Materials/slides produced for the meetings 	Support, integrate and triangulate evidence from observations and workshops' activities Integrate observations to improve our understanding of projects' related decision Keep records of the outcome of practices that companies member engaged in during the event and its impact on the research direction
Year 2* (2019–2020)	Meetings among Research Team members (170 h) <ul style="list-style-type: none"> ● Notes ● Materials/slides produced for the meetings 	Support, integrate, and triangulate evidences from observations and workshops activities Integrate observation to improve our understanding about research development
	Design Meetings with companies to design the research (75 h) <ul style="list-style-type: none"> ● Notes ● Materials/slides produced for the meetings 	Familiarize with the organizational context, values and languages Support, integrate and triangulate evidence from observations and workshops' activities Integrate observations to improve our understanding of projects' related decision
	Physical Workshops to exploit the research (8 h) <ul style="list-style-type: none"> ● Field notes ● Written posters and post-it from the sessions ● Materials/slides produced for the workshops 	Familiarize with the organizational context, values and languages Support, integrate and triangulate evidence from observations and workshops' activities Keep record of the outcome of practices that members engaged in during the projects (e.g. specific jargon, sketching) and share it with the other authors
	Digital Workshops to exploit the research (225 h) <ul style="list-style-type: none"> ● Workshops' recordings ● Workshops' notes ● Written chat among the people involved ● Written contents on Miro boards ● Materials/slides produced for the workshops 	Investigate specific research questions

Table 3.
(continued) Data sources and use

Type of data	Use in the analysis
Physical community event (8 h) <ul style="list-style-type: none"> ● Field Notes ● Written posters and post-it from the sessions ● Materials/slides produced for the meetings 	Support, integrate and triangulate evidence from observations and workshops' activities Integrate observations to improve our understanding of projects' related decision Keep records of the outcome of practices that companies member engaged in during the event and its impact on the research direction
Digital community events (8 h) <ul style="list-style-type: none"> ● Events' recording ● Event's notes ● Written chat among the people involved ● Materials/slides produced for the meetings 	

Note(s): *Due to Covid-19 pandemic most of the activities were performed digitally

Source(s): Authors' own creation

Table 3.

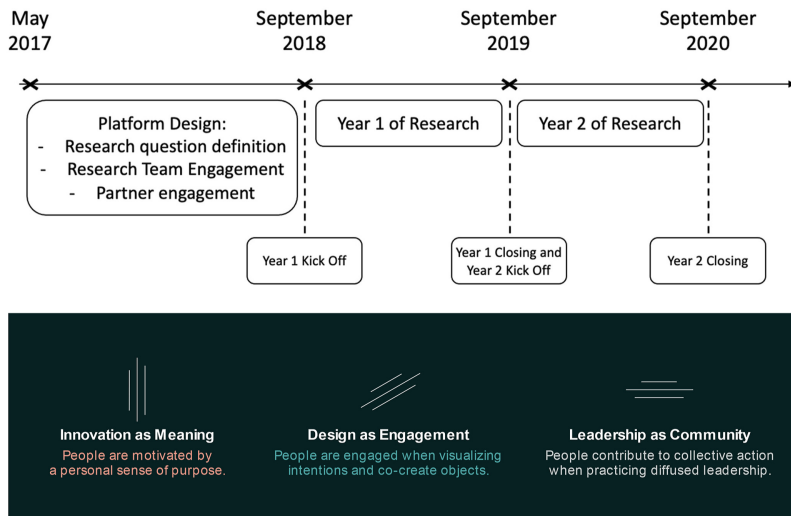


Figure 1.
Timeline and
manifesto

Source(s): Authors' own creation

challenges and contributes to the IDEaLs platform's broader objectives by integrating practical solutions with academic research.

4.1 Introducing IDEaLs: the story behind the project

IDEaLs, initiated by the School of Management of Politecnico di Milano and the Center for Creative Leadership in collaboration with leading organizations across various industries, embarked on an ambitious journey to explore effective engagement strategies for fostering innovation within organizations. This initiative was driven by a fundamental concern among its founders, who, with extensive backgrounds in innovation management as scholars and consultants, questioned the real-world impact of innovation research on companies.

They pondered the outcomes of collaboration between academia and industry, particularly the tangible effects following innovation workshops. These reflections on the gap between theoretical insights and practical application in fostering innovation were the catalysts for IDEaLs's inception, aiming to produce academically relevant research that also acts as a catalyst for change and action within companies, exploring the overarching research question of "How to engage people to make innovation happen?"

Launched officially in September 2018, IDEaLs represents a partnership between a dedicated Research Team and a consortium of companies committed to advancing rigorous and relevant research in the field of innovation. The platform also engages thought leaders from innovation, design, and leadership as part of its Brain Trust, who inspire, validate, and disseminate the platform's findings. The project's initial editions, from September 2018 to September 2020, were marked by structured interactions among the partners, beginning with a Kick-Off Meeting to align expectations and foster a shared commitment to the learning process.

IDEaLs organized community meetings throughout each research year, including a Mid-Term review and a Closing event, to assess progress and share outcomes among participating companies. These gatherings facilitated a continuous dialogue and collaboration between the Research Team and the companies, contributing to academic research and practical improvements within the organizations. Table 4 details the research framework and platform design, outlining the phases, timeline, actors involved, and activities for the two years covered in this study, illustrating the methodical steps undertaken in each edition to bridge the gap between theory and practice in innovation management.

4.2 Main topic definition and companies' onboarding

Despite the Research Team's prior articulation of the overarching research goal, "How to engage people to make innovation happen?" informed by theoretical foundations, it was pivotal to ascertain the challenge's relevance for the participating companies and ensure a mutual understanding of the issue to foster meaningful collaboration among all stakeholders.

The Kick-off events played a critical role in achieving this alignment. During these sessions, managers from all partner companies convened for a comprehensive day-long meeting. They discussed their organizations' challenges in motivating employees to participate in innovation initiatives and sharing insights and experiences. This interaction was vital for grounding the research in real-world concerns and ensuring the project remained relevant to the companies' needs.

At these events, the Research Team presented the IDEaLs manifesto to all partners and the Brain Trust for the first time, inviting critique and suggestions for refinement through workshops and roundtable discussions. The goal was to cultivate a collective understanding and ownership of IDEaLs, its objectives, and its vision. Participants were encouraged to view themselves not merely as clients of a research project but as co-creators of the initiative, contributing actively to its direction and success.

Additionally, company representatives shared specific innovation challenges and opportunities identified within their organizations, fostering a collaborative dialogue within the IDEaLs environment. Through community activities and workshops, these discussions facilitated direct exchanges on each company's challenges and sought IDEaLs's support in addressing them. The meeting concluded with each company outlining their research brief for the Research Team, ensuring alignment with the central research question of engaging people in innovation processes.

4.3 Starting the collaboration: the subtopics within companies

Following the Kickoff, the Research Team, comprising a research director and a researcher per company, embarked on a tailored approach to the research process design, closely

	Phase	Timeline	Purpose	Actors	Activities
Research framing and platform design	Research framing	5 month Jan 2017 May 2017	Define the research topic aim and purpose Setting the main research question Establishing the Collaborative Inquiry mechanisms and setting direction	Research Team	<ul style="list-style-type: none"> ● Monthly research meetings to design the research and converge toward a shared research path ● Literature review ● Research questions definition ● Individuals' research are competence definition ● Definition of individual research areas
	Platform design	4 month April 2017 July 2017	Designing the organization of the platform, working methods and processes	Research Team	<ul style="list-style-type: none"> ● Definition of roles within the Research Team according to the individual specific competences (communication and website, platform design, partner management) ● Definition of the functioning mechanisms of the platform
	Partner engagement	4 month May 2017 Sept 2017	Finding and engaging companies in the research platform	Research Team	<ul style="list-style-type: none"> ● Scouting of companies ● Preliminary meetings with companies to share the initiatives and align over shared objective ● Companies contract definition and signature
First year research Cycle	Year 1 Kick Off Meeting and initial Mode 2 activities	1 day Sept 2018	Create the community and engage all partners around a shared research question	Research Team and companies' representatives (2 managers for each company)	<ul style="list-style-type: none"> ● Networking to foster relationships and community creation ● Sharing of companies' challenge ● Community workshop to align over a shared research question ● Preliminary individual meetings between the Research Team and the following to start framing the research and the project to be performed

Table 4. Phases, timeline, actors involved, and activities for the two years of research covered in the study

(continued)

Phase	Timeline	Purpose	Actors	Activities
Establishing Collaborative Inquiry mechanisms and activities	2 months Sept 2018 Nov 2018	With each company: Understanding of the company's innovation problem Establish basic commitment for a collaboration project Mutual education about expectation from the project	Research Team and companies' referee	<ul style="list-style-type: none"> ● Preliminary dialogues with managers about common areas of interest ● Company visit to better emphasize with the company environment and organization ● Mutual education about the company culture and expectations for the research project ● Exploration of different research design and methods ● Initial decision about the timeline of the research project and agreement about the data collection process and tools
Developing the Collaborative Inquiry design methods and process	2 months Dec 2018 Jan 2019	Refining the research design methods, data collection, process and protocols	Research Team and companies' referee	<ul style="list-style-type: none"> ● Development of data collection tools ● Setting of data collection timeline and procedure
Mid Term event	1 day March 2019	Share with the community the advancement in the research and preliminary results, and align over the next step	Research Team and companies' representatives (2 managers for each company)	<ul style="list-style-type: none"> ● Sharing of preliminary understanding of the research ● Sharing of companies' project status and understanding ● Preliminary test of tools before of the deployment within the companies' organization ● Agreement on the next step for the second part of the research project
Data collection and interpretation	4 months Feb 2019 May 2019	Companies' project development and data collection	Research Team, companies' referee and companies' employees engaged in the project	<ul style="list-style-type: none"> ● Project roll out in each company (Mode 2) ● Contextual data gathering through qualitative (ethnography, recordings, workshop materials) and quantitative (surveys) data (Mode 1) ● Preliminary data analysis

(continued)

Table 4.

	Phase	Timeline	Purpose	Actors	Activities
	Closing of companies' projects	3 months June 2019 August 2019	Delivering impact in the companies	Research Team and companies' referee	For each company individually <ul style="list-style-type: none"> ● Delivery of a final report including the project results ● Closing meeting with company management, results delivery and impact assessment
	Closing Event	1 day Sept 2019	Sharing of final projects' and research results and understanding	Research Team and companies' representatives (2 managers for each company)	<ul style="list-style-type: none"> ● Sharing of research results and key learnings ● Sharing of companies' project results, impact and learning ● Defining the next step and preliminary framing of a new research question
Second Year Research Cycle	Year 2 Kick Off Meeting and initial Collaborative Inquiry activities	1 day Sept 2019	Create the community and engage all partners around a shared research question	Research Team and companies' representatives (2 managers for each company)	<ul style="list-style-type: none"> ● Networking to foster relationships and community creation ● Sharing of companies' challenge ● Community workshop to align over a shared research question ● Workshop and roundtables to start framing the research and the project to be performed
	Establishing Collaborative Inquiry mechanism and activities	3 months Sept 2019 Dec 2019	With each company: Understanding of the company's innovation problem Establish basic commitment for a collaboration project Mutual education about expectation from the project	Research Team and companies' referee	<ul style="list-style-type: none"> ● Preliminary dialogues with managers about common areas of interest ● Mutual education about the company culture and expectations for the research project ● Exploration of different research design and methods ● Initial decision about the timeline of the research project and agreement about the data collection process and tools

Table 4.

(continued)

Phase	Timeline	Purpose	Actors	Activities
Developing the Collaborative Inquiry design methods and process	2 months Jan 2020 Mar 2020	Refining the research design methods, data collection, process and protocols	Research Team and companies' referee	<ul style="list-style-type: none"> ● Development and test of data collection tools ● Setting of data collection timeline and procedure
Mid Term event	1 day March 2020	Share with the community the advancement in the research, testing of the tools developed, and align over the next step	Research Team and companies' representatives (2 managers for each company)	<ul style="list-style-type: none"> ● Sharing of preliminary understanding of the research ● Preliminary test of tools before of the deployment within the companies' organization ● Agreement on the next step for the second part of the research project
Data collection and interpretation	4 months Feb 2020 July 2020	Companies' project development and data collection	Research Team, companies' referee and companies' employees engaged in the project	<ul style="list-style-type: none"> ● Project roll out in each company (Mode 2) ● Contextual data gathering through qualitative (ethnography, recordings, workshop materials) and quantitative (surveys) data (Mode 1) ● Preliminary data analysis
Closing of companies' projects	3 months June 2020 August 2020	Delivering impact in the companies	Research Team and companies' referee	<ul style="list-style-type: none"> ● For each company individually ● Delivery of a final report including the project results ● Closing meeting with company management, results delivery and impact assessment
Closing Event	1 day Sept 2020	Sharing of final projects and research results and understanding	Research Team and companies' representatives (2 managers for each company)	<ul style="list-style-type: none"> ● Sharing of research results and key learnings ● Sharing of companies' project results, impact and learning ● Defining the next step and preliminary framing of a new research question

Source(s): Authors' own creation

Table 4.

collaborating with each company. Despite a shared commitment to the overarching goal of "How to engage people to make innovation happen," the companies pursued this objective within diverse contexts and through varying projects. Some companies aimed to mobilize their workforce behind a newly established strategic direction, while others focused on practical objectives, such as fostering the adoption of digital tools. Additionally, a few

companies concentrated on cultural shifts, encouraging employees to adopt new mindsets like design thinking or agility, which are crucial for innovation in today's complex environment.

To navigate this diversity while maintaining research integrity, the Research Team pursued dual tracks. Each pair of researchers and directors engaged deeply with their assigned companies, exploring specific issues and formulating targeted action plans. This process necessitated a thorough understanding of each company's organizational context and the strategies already employed to tackle identified challenges.

Simultaneously, the Research Team convened bi-monthly for internal discussions to ensure project alignment. These meetings served to identify any common challenges among the companies and to brainstorm potential solutions or artifacts that could be explored using a Design Science Research (DSR) approach for emerging issues. A significant insight from these discussions was the universal need to grasp how employees perceived and experienced innovation initiatives within their organizations. Recognizing this aspect was pivotal, laying the groundwork for developing effective strategies to engage staff in innovation efforts more effectively.

4.4 The research protocol and the data required

Amidst the diversity of subtopics pursued by participating companies, a unified commitment to the overarching goal of "How to engage people to make innovation happen" allowed the Research Team to develop a comprehensive research protocol applicable across all companies. This protocol integrated Design Science Research (DSR), Collaborative Management Research (CMR), and Action Research (AR) methodologies.

In the realm of DSR, the Research Team, throughout the two years of study, engaged intimately with companies to conceptualize and create artifacts to probe the identified issues. Upon determining the specific challenges and needs of the companies, the team proposed innovative artifacts for testing, underscoring their potential to contribute both to academic knowledge and practical application. During the initial year, the chosen artifacts were images, while stories were selected for deeper exploration in the subsequent year. Both artifacts are detailed in the following sections. Mid-term meetings were pivotal in pre-testing these artifacts within the community before their organizational implementation, facilitating a preliminary understanding and agreement on the research's subsequent phases.

Through CMR, the Research Team provided tailored support to each company, aiding in the understanding and applying the identified artifact. This collaborative effort involved developing action plans and conducting tests of the artifact to address the central issue.

Adopting an AR methodology, the team employed a data-driven approach within each company to monitor performance metrics. This approach enabled the application of experimental and unobtrusive methods to examine causality, identify underlying mechanisms, and collaboratively assess the robustness of the findings (Pasmore *et al.*, 2008). The AR focus extended to general performance indicators such as engagement and organizational citizenship, and in the second year, it also encompassed specific research questions of interest to the team. These questions included:

- (1) Examining how intimacy influences sensemaking of change.
- (2) Investigating the effect of alternative decision-making methods on alignment with a new strategic vision.
- (3) Analyzing how prospective stories facilitate the transformation of individuals and organizations.

The first question involved a survey-based study to explore the causal relationship between intimacy (as an independent variable) and individual sensemaking of innovation (as a

dependent variable) across various company initiatives (Bellis *et al.*, 2023a, b). The second question entailed an ethnographic experiment to assess how different dynamics of convergence affect comprehension of a new strategic vision (Magnanini *et al.*, 2022, 2023). The third study combined quantitative and qualitative methods to examine the evolution of stories and their impact on transformation (Zasa *et al.*, 2022).

Table 5 summarizes how DSR, CMR, and AR methodologies were implemented, illustrating the multifaceted approach to address the research goal comprehensively.

4.5 Implementing a design Science Research approach

Over two years, our research concentrated on distinct artifacts: images in the first year and stories in the second, each chosen for their unique ability to facilitate engagement and sensemaking within organizational innovation projects (Trabucchi *et al.*, 2020; Bellis and Verganti, 2020; Magnanini *et al.*, 2022).

Initially, the Research Team discovered the profound impact of images as a means to engage individuals and catalyze change. Drawing from research, images evoke more comprehensive meanings than words, enabling the externalization of inner cognitive and emotional states (Kosslyn, 1994). This visual approach supports individuals in conceptualizing new scenarios and potential futures, encouraging reasoning based on values, emotions, and purpose over simple heuristics. The principle that “a picture is worth a thousand words” becomes particularly relevant in innovation, where images help individuals articulate shared meanings and navigate diverse interpretations, effectively bridging conceptual gaps and enhancing mutual understanding (Star and Griesemer, 1989; Paroutis *et al.*, 2015; Jaspersen and Stein, 2019).

At the Year 1 Mid-Term meeting, the team shared initial findings from employing images, highlighting their role in generating collective insights. These discussions led to developing and testing the Meaning Chain, a tool designed to aid collaborative sensemaking within

Action research	Collaborative management research	Design science research
<p>In both years, the Research Team played a double role, being both researchers and agent of change with interactive mindset (Roth <i>et al.</i>, 2007; Bushe and Marshak, 2015; Cooke and Wolfram-Cox, 2005)</p> <p>Despite the collaborative nature of the inquiry, some data-driven approaches were followed</p> <ul style="list-style-type: none"> - Year 1: Performance Check - Year 2: Performance Check and Specific Research questions <p>This approach enabled researchers to apply experimental and unobtrusive methodologies, test causality, identify the mechanisms underlying the identified relationships, and finally, co-evaluate their robustness through a collaborative interpretation (Pasmore <i>et al.</i>, 2008)</p>	<p>In both years, crucial for joining IDEaLs was sharing a common interest in the learning process partners and researchers were going through (Coghlan <i>et al.</i>, 2012)</p> <p>During company’s meeting, the two actors (partners and Research Team) together inquire into issues of concern, develop action plans to address the problems, plan action, act, and enter into collaborative cycles of planning, action, and reflection to cogenerate practical knowledge. This process enabled to bring insightful, influential, and immediately applicable knowledge (Radaelli <i>et al.</i>, 2014)</p>	<p>Partners and Research Team bounded around the shared objective of designing an artifact (for Year 1 the images, for Year 2 the stories) aimed to extend human and organizational knowledge, impacting human behaviors and organizational dynamics (Hevner <i>et al.</i>, 2004)</p>

Source(s): Authors’ own creation

Table 5.
IDEaLs main practices adopted to enable Collaborative Inquiry methods

companies. Teams were tasked with defining innovation through interconnected images and narratives, fostering a co-created understanding of the innovation's significance.

The following year, the focus shifted to story-making as a mechanism for engaging with change. Recognizing storytelling's prevalent role in change management but critiquing its often unidirectional, prescriptive nature (Gabriel, 2000; Foroughi *et al.*, 2020), the Research Team sought to innovate by designing an experience that empowered individuals to actively participate in shaping change through story creation.

The structured experience spanned three to four meetings over several months, during which participants were encouraged to craft segments of their stories, reflect on their transformation journey, and make sense of ongoing changes. Supported by a toolkit and facilitated by the Research Team, this process allowed for personal reflection and committed participants to tangible short-term goals aligned with the desired change, thereby embedding the innovation process directly into the fabric of the organization's culture.

This story-making initiative was implemented across all partner companies, sharing a common methodology while applying it to specific innovation challenges. Through this innovative approach, the Research Team demonstrated the efficacy of stories in fostering a participative, engaged process of organizational transformation, underscoring the vital role of narrative in enacting and perceiving change.

4.6 Value delivered to companies: how DSR, AR, and CMR approaches generated value for companies

Over its initial two years, IDEaLs significantly impacted the landscape of innovation engagement, reaching over 1,000 individuals across partner organizations globally through over 75 digital and 15 physical workshops. After each year, the Research Team compiled and distributed actionable toolkits to the partner companies. These toolkits, derived from the year-specific artifacts developed under the Design Science Research (DSR) approach—images in the first year and story-making in the second—were designed to empower companies to replicate the Research Team's successful practices in fostering innovation engagement.

Employing an Action Research (AR) methodology, the data-driven aspect of the research enabled the application of experimental and subtle observational techniques, facilitating the collection and aggregated analysis of extensive data sets. This analytical approach provided managers with profound insights into the factors influencing employee engagement, guiding the development of effective engagement strategies. Notably, the first year's findings underscored the superior impact of image-based activities over text-based ones on engagement levels. Continuously revising and reflecting upon images as tangible representations of thought deepened participants' engagement by fostering more profound reflection and understanding, contributing actively to the innovation process. For managers, the implication is clear: engaging employees in innovation requires more than just conveying the vision; it necessitates offering them tangible interactions with the concept.

The Collaborative Management Research (CMR) methodology further augmented the project's impact, enabling companies to address specific concerns with the Research Team's guidance. Through collaborative planning and action, companies could develop targeted strategies and generate practical knowledge.

Additionally, establishing a community that convened regularly throughout the year yielded further advantages for the Research Team and the partner companies. By sharing and discussing project outcomes within this broader community, partners, and researchers could compare different applications of the same tools across varied innovation challenges and organizational contexts. This collaborative environment facilitated a shared learning experience and highlighted how identical methodologies could yield diverse results based on the specific nature of the innovation challenge and the company's environment.

4.7 value obtained by researchers: aggregated data analysis and publishing

Over the initial two years of the IDEaLs initiative, the Research Team successfully collected a vast dataset, laying the groundwork for comprehensive longitudinal studies and targeted experiments. This wealth of data facilitated the exploration of causality between variables and elucidated underlying mechanisms driving observed relationships. Moreover, the Action Research (AR) methodology empowered individual researchers to pursue inquiries aligned with the overarching goals of IDEaLs and their research interests, enriching the project's academic breadth. Table 6 summarizes the impact of the project in its first two years.

5. Discussion: defining research platforms for studies in the innovation field

5.1 Identifying a research platform framework

Building on the IDEaLs experience, we can map the IDEaLs experience to the platform domain. The Collaborative Research Platform Approach leverages the Client-as-a-Source (CaaS) model of multi-sided Orthogonal Platforms (Trabucchi et al., 2017). It offers a novel solution to overcome the challenges inherent in Collaborative Inquiry Methods. By introducing a central figure, the Platform Orchestrator, this approach creates unique value propositions for different stakeholders while fostering unidirectional cross-side network externalities, drawing inspiration from the Data-Driven Innovation (DDI) process characteristic of CaaS platforms (Trabucchi and Buganza, 2019b). The DDI process highlights how identifying specific data sets that address innovation challenges can catalyze platform design, guiding the selection of customers who can generate the needed data, and

	Academic impact	Practitioner impact
Year 1 (2018– 2019)	<p>Publications</p> <ul style="list-style-type: none"> – 1 Book – 2 Scientific Articles – 1 Practitioner Article – 2 Conference Article – 1 White paper <p>Impact on students</p> <ul style="list-style-type: none"> – Knowledge acquired has been deployed to +540 MSc students – The project enables the development of 2 Master thesis – 3 PhD students trained on the topic of the research project 	<p>For partner companies (7 companies)</p> <ul style="list-style-type: none"> – +300 people engaged across the companies in 13 workshops – 1 Toolkit (Meaning Chain) to apply the tools and artifact developed through the research <p>For other companies (3 companies)</p> <ul style="list-style-type: none"> – 3 ad hoc projects developed through leveraging on the Meaning Chain Tool
Year 2 (2019– 2020)	<p>Publications</p> <ul style="list-style-type: none"> – 1 Book – 3 Scientific Articles – 7 Conference Articles <p>Impact on students</p> <ul style="list-style-type: none"> – Knowledge acquired has been deployed to +1.300 MSc students – Knowledge acquired has been deployed to +450 Executive students – The project enables the development of 4 Master thesis – 3 PhD students trained on the topic of the research project 	<p>For partner companies (7 companies)</p> <ul style="list-style-type: none"> – +1.000 people engaged across the companies in 75 workshops – 1 Toolkit (Story-making experience) to apply the tools and artifact developed through the research <p>For other companies (2 companies)</p> <ul style="list-style-type: none"> – 2 ad hoc projects developed through leveraging on the Story Making Tool

Source(s): Authors' own creation

Table 6.
IDEaLs overall results
over the two years and
beyond

initiating a client-as-a-source platform centered on the requirements of an orthogonal participant. This concept serves as a blueprint for designing a research platform tailored to collaborative inquiry.

This approach delineates two primary sides: companies (and their management teams) as the first and researchers as the orthogonal (second). The platform mechanism is designed to provide companies with a suite of services by the platform (as illustrated in Figure 2 point a), which may include specialized tools developed through AR and CMR methodologies. In exchange for these services, companies contribute data and information to the platform, creating value for their operations (Figure 2, point b). The Platform Orchestrator then compiles and presents this data in an aggregated format to researchers (indicated in Figure 2, point c).

The Platform Orchestrator delivers twofold value: offering services tailored to companies and providing researchers with aggregated data. This setup induces unidirectional network externalities, with researchers valuing the platform more as the number of participating companies increases. Conversely, the value perceived by companies is not dependent on the number of researchers utilizing the platform.

Addressing the limitations of Collaborative Inquiry Methods, the Collaborative Research Platform Approach ensures that the focus is not narrowly placed on company-specific pilot projects to the detriment of broader issues. Since companies are vital in generating network externalities, the platform's sustainability and growth hinge on its capacity to continually attract and serve an expanding roster of companies (as depicted in Figure 2, Point B).

Moreover, this approach allows researchers to base their analysis and conclusions on aggregated data from various companies rather than relying on information from a single organization. This method facilitates the replication (either literal or theoretical) of cases, significantly bolstering the internal and external validity of the research findings. Through this innovative approach, the Collaborative Research Platform aims to enhance the rigor and relevance of research outcomes in collaborative inquiry.

5.2 Mapping the IDEaLs experience in the CRPA framework

Central to the initiative is the Platform Orchestrator, which encompasses the IDEaLs orchestrator and institutional setting. This entity is responsible for crafting the project's core experience, adopting a Collaborative Inquiry approach, and establishing the rules of engagement for all participants (Figure 3).

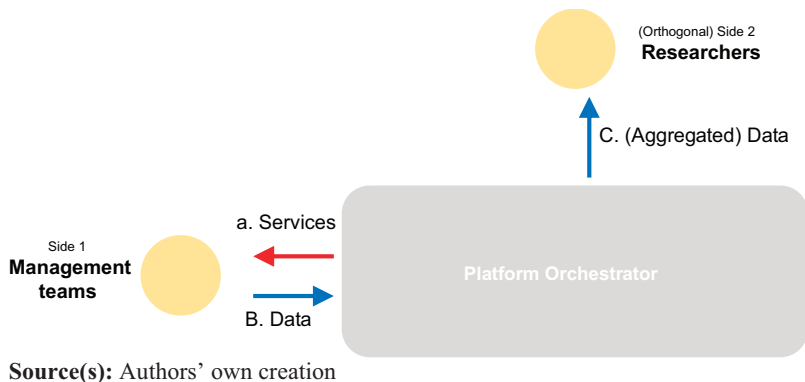


Figure 2.
The CRPA framework

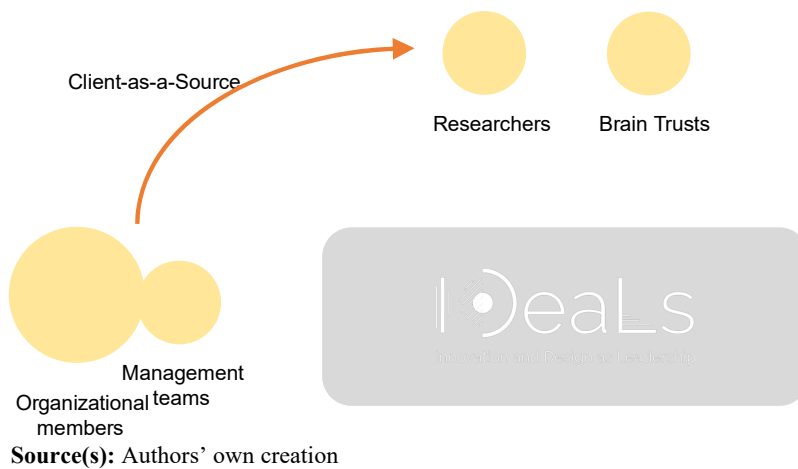


Figure 3.
IDEaLs as a
collaborative research
platform

Researchers play a pivotal role in the IDEaLs framework, formulating specific research questions to explore through the platform's activities. These questions are tailored to address the IDEaLs's overarching goals and the researchers' interests.

Companies, represented by their Management Teams, provide the project's foundational support. They engage with the platform to address organizational challenges through pilot projects, sustaining the initiative's objectives.

Workshop participants, chosen by each company, contribute as Organizational Members. Their involvement in the IDEaLs experience is twofold: they provide essential data for research purposes and seek personal development by participating in the sessions.

Brain Trusts, consisting of professionals who oversee the aggregate data and experiences, identify patterns and insights to assist the Research Team in validating the research outcomes. Their external perspective helps to ensure the integrity and relevance of the findings.

IDEaLs functions as a multi-sided platform characterized by its diverse demand and orthogonal sides, as [Trabucchi and Buganza \(2022\)](#) outlined. The primary beneficiaries are the companies and participants who engage with and utilize the Design Science Research (DSR) artifacts developed by the Research Team. This model contrasts with traditional Collaborative Inquiry approaches, where the interaction is typically one-to-one between a company and a researcher ([Hevner, 2007](#); [Gregor and Hevner, 2013](#)). Instead, IDEaLs facilitates a collective approach to defining the research agenda, enhancing the collaborative management research paradigm.

In this ecosystem, the Platform Orchestrator enables value creation for all involved parties. Companies experiment with new methodologies to address specific challenges through pilot projects, simultaneously generating data for research. Researchers, coordinated by the Platform Orchestrator, collaborate on designing artifacts that benefit all stakeholders. Brain Trusts further enriches the platform by acting as validators, offering broader insights, and overseeing the project's integrity across different organizational contexts. This structure fosters a dynamic, collaborative environment that extends beyond conventional research paradigms, showcasing the innovative potential of IDEaLs as a model for collaborative innovation and research.

5.3 Mapping the IDEaLs experience in the CRPA framework as data-driven research process
 Guided by the Data-Driven Innovation process (Trabucchi and Buganza, 2019b), the interactions within the IDEaLs platform are intricately mapped, drawing upon Collaborative Inquiry methods. This approach underscores a dynamic, evolving research direction shaped collaboratively by the Platform Orchestrator, setting the structural foundation for IDEaLs's annual projects (Figure 4).

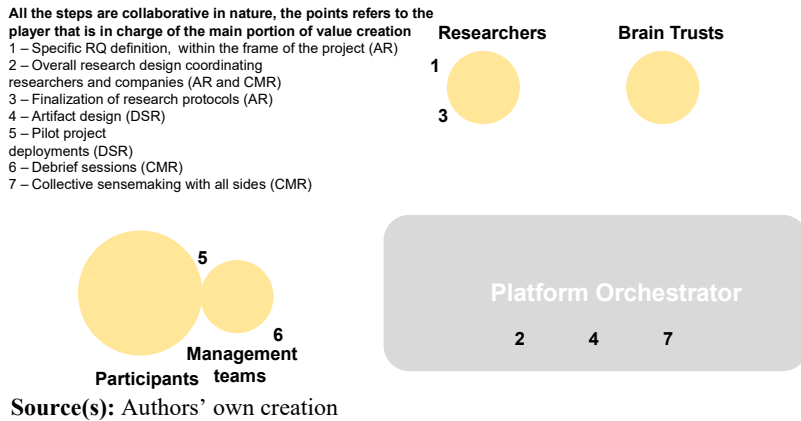


Figure 4.
 Value creation steps in the collaboration process on a platform-based model

Initially, researchers identify specific research questions within the framework established by the Platform Orchestrator, delineating the data required for their inquiries. This phase embodies the academic essence of action research, focusing on generating knowledge through practical engagement (Rapoport, 1970; Pasmore *et al.*, 2008).

Subsequently, the Platform Orchestrator consolidates these research questions, orchestrating the forthcoming edition of the IDEaLs project. This critical design phase sees the Orchestrator smoothing the path for research by identifying synergies and articulating organizational value, reflecting the dual imperative of balancing academic rigor with practical relevance (Coghlan, 2011; Muzellec *et al.*, 2015). This ambidextrous role necessitates a delicate equilibrium between research integrity and the pragmatic needs of partner companies (Pasmore *et al.*, 2008; Roth *et al.*, 2007).

Researchers then tailor their protocols to accommodate practical constraints while ensuring relevance for the participating companies. This adjustment requires a nuanced understanding of the operational landscape, facilitated by the Orchestrator's mediating influence.

In the fourth phase, researchers collaboratively design an encompassing experience in line with Design Science Research (DSR) principles (Hevner *et al.*, 2004). This process involves iterative engagement with company managers, fostering an environment that respects research rigor and organizational context.

The execution phase sees the deployment of research artifacts across various companies, requiring bespoke adjustments to reflect the unique characteristics of each pilot project while maintaining academic rigor. This collaborative effort involves direct input from company managers and oversight by the Platform Orchestrator to ensure consistency and comparability (Hevner *et al.*, 2004).

Debriefing sessions with organizational managers facilitate collective reflection on the research outcomes, emphasizing the importance of collaboration in deriving meaningful insights from the deployed sessions (Pasmore *et al.*, 2008).

Finally, under the Orchestrator's guidance, the research team analyzes aggregated data to affirm the study's generalizability and theoretical contributions. This comprehensive analysis benefits from cross-research feedback, input from Brain Trusts, and collaborative sensemaking with managers from all participating companies. This multifaceted collaboration enriches the research findings, culminating in the preparation of publications that encapsulate the project's academic and practical advancements.

Throughout these stages, IDEaLs exemplifies a model of collaborative research that bridges the gap between theory and practice, leveraging a multi-sided platform approach to foster innovation and knowledge creation across various organizational contexts.

5.4 The benefits of the CRPA in comparison to other collaborative inquiry approaches

The Collaborative Research Platform Approach (CRPA) presents distinct challenges and benefits compared to traditional Collaborative Inquiry methods rooted in platform theory. The primary challenges involve the inherent complexities of establishing a research platform, including designing and balancing tailored value propositions for each stakeholder group and navigating the initial stages of platform development (Muzellec *et al.*, 2015; Evans and Schmalensee, 2016). Despite these obstacles, the potential benefits of engaging all participants are significant (Parker *et al.*, 2016).

Applying Platform Thinking to collaborative inquiry yields two key advantages, addressing issues highlighted earlier: enhancing the generalizability of Collaborative Inquiry outcomes and amplifying the relevance of such studies. CRPA introduces a structure where the outcomes of a Design Science Research (DSR) methodology serve as a foundational platform. This framework allows researchers and organizations to tailor and extend the research to meet their specific needs more effectively. Additionally, the collective participation of organizations in the same research project ensures more robust findings, as the research can be replicated across various contexts for comparison. This communal approach strengthens the research validity and fosters a peer network, encouraging organizations to recognize the value of collaborative research and explore further opportunities.

The model facilitates data aggregation akin to a Client-as-a-Source (CaaS) platform strategy (Trabucchi *et al.*, 2017), creating beneficial cross-side network externalities for researchers. This aggregation enhances the generalizability of results across diverse pilot projects and contexts, achieving a level of generalizability comparable to multiple case studies. This approach addresses a common limitation of traditional Collaborative Inquiry methods, which often restrict the action or artifact to a single organization (Börjesson and Elmquist, 2011; Park *et al.*, 2020).

Moreover, ongoing interactions among managers, researchers, and the Orchestrator, alongside periodic contributions from other stakeholders like organizational participants and Brain Trusts, foster a dynamic, iterative process. This continuous collective sensemaking enhances the relevance of research questions, directions, findings, and contributions through validation, reinforcement, and revision from multiple collaborative perspectives. Such an environment, where stakeholders pursue aligned yet distinct value propositions, exemplifies the essence of platform-based collaboration, creating mutual value and advancing collaborative research (Trabucchi and Buganza, 2023).

6. Conclusions

This paper presents the Collaborative Research Platform Approach (CRPA) as a novel framework to enhance innovation research through Collaborative Inquiry methodologies.

Drawing inspiration from the role of platforms in the innovation literature (Cusumano *et al.*, 2019), we explore the potential of a platform-based approach to address the challenges and opportunities in innovation studies, taking a Mode 2 approach, while embracing new future-oriented research approach (Gümüşay and Reinecke, 2024). The IDEaLs case, an international initiative designed to foster engagement in innovation activities while contributing to scientific knowledge, is the longitudinal participatory case that let the CRPA framework emerge.

Theoretically, the CRPA framework offers several key advantages. Primarily, it utilizes a platform approach to apply Collaborative Inquiry methodologies (Hevner, 2007), allowing for comparing results across different companies, thereby addressing the issue of poor generalizability, typically linked to Mode 2 approaches. Moreover, it is coherent with the recent debates that critique the relevance of past-dependent research in a world that is changing so fast (Gümüşay and Reinecke, 2024). Indeed, CRPA pushes researchers to propose actively something new to help organizations foster innovation while developing knowledge relevant both for theory and for practice. Furthermore, the creation of a community among participating management teams provides a collaborative environment for sharing insights and feedback across diverse industries, significantly enhancing the dissemination and impact of IDEaLs research (Press *et al.*, 2021; Buganza *et al.*, 2022; Trabucchi *et al.*, 2022a, b). This community aspect not only facilitates the direct application of research findings but also encourages the adoption of these insights in new projects and by additional companies, enhancing the impactful dimension of research activities.

Design Science Research (DSR) within this framework is a foundation for a product platform that evolves to meet the needs of various organizations or researchers seeking specific data (Meyer and Lehnerd, 1997; Trabucchi and Buganza, 2019a). The modular nature of platforms (Evans and Schmalensee, 2016) further supports potential transactional expansions, as evidenced by projects with companies outside the initial community (Trabucchi and Buganza, 2023).

Besides, by exploring the application of collaborative inquiry as a platform, we provide a possible third way of unlocking the tradeoff between theoretical relevance and practical impact. The platform configuration ensures no compromise on either of the two. Moreover, it allows us to research through traditional data-driven approaches (e.g. surveys or case studies). In the IDEaLs projects, researchers had the chance to explore specific topics that were not strictly related to the collaboration. The platform creates a space where it is possible to conduct research using traditional methods but still somewhat “augmented” by having a set of managers/companies already committed to the research, thus allowing the researcher to collect higher-quality data.

In summary, this research has two main research implications—the first deals with the platform thinking literature (Cusumano *et al.*, 2019). Platforms have been widely considered business models, but they are emerging as a lens through which various value-creation mechanisms are read outside the business and strategic dimensions. Indeed, by framing a research project as a platform, we do have the chance to see all the various opportunities (e.g. further expansion; see Trabucchi and Buganza, 2023) or challenges in setting it up (see Muzellec *et al.*, 2015; Stummer *et al.*, 2018), while corroborating the broader applications of platforms as a tool to foster innovation.

The second main contribution is at the methodological level and deals with the Collaborative Inquiry and Mode 2 approach; indeed, this platform-based approach suggests a hybrid of various methodologies like AR (Pasmore *et al.*, 2008), CMR, and DSR (Hevner, 2007), while reducing the typical issues of low generalizability of these research attempts, while embracing a future looking research environment (Gümüşay and Reinecke, 2024).

This research underscores the versatility of a platform-based approach beyond traditional business modeling, highlighting its role as a coordination mechanism for collaborative endeavors. It demonstrates how companies can benefit from participating in Collaborative

Inquiry projects, fostering a community of thought leaders, and enabling cross-pollination on broader topics. This approach enriches the collaborative experience and amplifies the research's perceived value and practical impact. Indeed, this research may work as an inspiring case for managers to see platforms as a lens through which reading collaboration activities can be conducted. At the same time, for researchers, it can act as an example to explore other projects at the intersection between theory and practice.

Finally, the CRPA's most significant practical outcome is the transformative processes initiated by companies through pilot projects developed to address specific challenges, leveraging the artifacts and methodologies introduced by IDEaLs.

However, this study has limitations. The CRPA, while striving for broader applicability and generalizability in Collaborative Inquiry, is inherently challenged by the specifics of setting up and sustaining a research platform across multiple editions focused on innovation. Additionally, the applicability of CRPA may be constrained by the research domain's specificity and the relevance of DSR methodologies, such as workshops, in particular areas of study. These challenges, while notable, maintain the framework's potential to enhance the generalizability and relevance of research outcomes, advocating for further exploration of similar approaches in other management research domains.

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