Sample Report - Problem Solving Workshop Example

Meeting Purpose and Objectives:
- To generate ideas on how we can maximize our market share in a tough economy.
- To bring together team members from around the organization and across the globe to gain a full range of perspectives and ideas.
- To provide an anonymous forum for the open exchange of ideas and possibilities.
- To organize and prioritize our ideas and solutions.
- To layout an action plan with responsibilities and deadlines.
- To prepare a set of recommendations to incorporate into our business plan.

Conference Agenda

acja:

Verbal Discussion: Describe the problem and share background information.

- Step 1: Brainstorm - How can we maximize our market share in a tough economy?
- Step 2: Categorize Solution Ideas - What themes or areas of focus emerge?
- Step 3: Prioritize Solution Ideas - Impact and Feasibility
- Step 4: Results of Prioritization of Solution Ideas - Impact and Feasibility
- Step 5: Action Plan - How will we act on our Ideas and Solutions?
Steps 1 & 2 Brainstorm & Categorize
How can we maximize our market share in a tough economy?

Web Site Marketing

1. **Update our web site**
   Add some new and more interesting content to keep bringing current and potential customers back.
   - case studies
   - tips and techniques
   - Articles and links to other interesting site.

2. **Revisit web site indexing and key words**
   Are we best positioned with the major search engines? Look at benefits of buying keyword positioning.

3. **Research other web sites and offer reciprocal links**
   Increase chances of our targeted customers finding us on the web by requesting reciprocal links with other web-sites that these customers will also be looking at.
   - Contact our current customers to find out what they are reading and their favorite web resource sites.
   - look at industry association web sites

Sales Force

4. **Recruit more sales personnel - more feet on the street**

5. **Revise sales territories to more manageable size**
   Current geographic territories lead to uneven workloads. Some areas are too heavily covered and others are too sparse. Define territories based on market potential.

6. **Sales force training**
   Provide additional training opportunities for our new and existing sales people. Current training is out of date and some sales reps have not been fully trained in our new range of products.
   - look at online training options
   - View the training as a continuum over several months, with commitment to provide ongoing support for those who need it.

7. **Create shared learning teams among sales reps across regions**
   Keep sales force sharing ideas amongst each other. Use online learning teams to enable collaboration and sharing of ideas and success stories.
   - Search for technology to support this.
Working with our Distributors

8. **Bring distributors in for updated training on new product line**

9. **Offer new incentives**
   e.g., Distributor of the Month award.

10. **Monthly newsletter for distributors**
    Keeping them current on new products, sharing success stories and sales tips, keeping them motivated.

Current Customers

11. **Monthly newsletter for our customers**
    Email format provides cost effective way of distributing this.
    1. Inform of special offers and new products/services.
    2. Featured customer of the month.
    3. Customer success stories - how our customers are using our products.

12. **Online discussion forum - come meet other users of our products**
    Using online meeting tools (such as FacilitatePro!) to engage our customers in live discussion forums. Sharing ideas about how our products are being used.
    1. Question and answer session with our experts.
    2. Test these ideas out with some of our current customers.
    3. Send them an online survey to find out what agenda items they would be most interested in.
    4. What is the purpose of this? To sell more to our current customers and provide an additional service that we can market to future customers.

Other Ideas

13. **Revisit this question at least once a quarter -- keeping ideas current**
    1. invite sales force to participate
    2. invite product development and training staff also
    3. Have management provide direct feedback to participants about action items that have been taken as a result of the ideas generated.
    4. online meeting tools facilitate gathering, prioritizing and publishing of action plans (just as we are doing with this agenda)
## Steps 3 & 4: Prioritize Solution Ideas - Impact and Feasibility

<table>
<thead>
<tr>
<th>Web Site Marketing</th>
<th>Impact</th>
<th>Feasibility</th>
<th>Weighted</th>
<th>Quadrants</th>
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</thead>
</table>
| 1. **Update our web site**  
Add some new and more interesting content to keep bringing current and potential customers back.  
  1. case studies  
  2. tips and techniques  
  3. Articles and links to other interesting site. | 3.94 | 3.66 | 3.80 | Let's do it! |
| 2. **Revisit web site indexing and key words**  
Are we best positioned with the major search engines? Look at benefits of buying keyword positioning. | 3.54 | 3.61 | 3.58 | Let's do it! |
| 3. **Research other web sites and offer reciprocal links**  
Increase chances of our targeted customers finding us on the web by requesting reciprocal links with other web-sites that these customers will also be looking at.  
  1. Contact our current customers to find out what they are reading and their favorite web resource sites.  
  2. Look at industry association web sites | 3.27 | 3.36 | 3.31 | Let's do it! |

<table>
<thead>
<tr>
<th>Sales Force</th>
<th>Impact</th>
<th>Feasibility</th>
<th>Weighted</th>
<th>Quadrants</th>
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<tbody>
<tr>
<td>4. <strong>Recruit more sales personnel - more feet on the street</strong></td>
<td>3.42</td>
<td>3.30</td>
<td>3.36</td>
<td>Let's do it!</td>
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| 5. **Revise sales territories to more manageable size**  
Current geographic territories lead to uneven workloads. Some areas are too heavily covered and others are too sparse. Define territories based on market potential. | 3.38 | 3.43 | 3.40 | Let's do it! |
| 6. **sales force training**  
Provide additional training opportunities for our new and existing sales people. Current training is out of date and some sales reps have not been fully trained in our new range of products.  
  1. Look at online training options | 3.60 | 3.60 | 3.60 | Let's do it! |
| 7. **Create shared learning teams among sales reps across regions**  
Keep sales force sharing ideas amongst each other. Use online learning teams to enable collaboration and sharing of ideas and success stories. | 3.53 | 3.42 | 3.47 | Let's do it! |
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<th><strong>Working with our Distributors</strong></th>
<th>Impact</th>
<th>Feasibility</th>
<th>Weighted</th>
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<tr>
<td>8.</td>
<td><strong>Bring distributors in for updated training on new product line</strong></td>
<td>3.73</td>
<td>3.38</td>
<td>3.55</td>
<td>Let's do it!</td>
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<td>9.</td>
<td><strong>Offer new incentives</strong> e.g., Distributor of the Month award.</td>
<td>3.28</td>
<td>3.42</td>
<td>3.35</td>
<td>Let's do it!</td>
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<td>10.</td>
<td><strong>Monthly newsletter for distributors</strong> Keeping them current on new products, sharing success stories and sales tips, keeping them motivated.</td>
<td>3.22</td>
<td>3.53</td>
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<td>Let's do it!</td>
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<td><strong>Monthly newsletter for our customers</strong> Email format provides cost effective way of distributing this.</td>
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<td>1. Inform of special offers and new products/services.</td>
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<td>2. Featured customer of the month.</td>
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<td>3. Customer success stories - how our customers are using our products.</td>
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<th><strong>Other Ideas</strong></th>
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<td><strong>Revisit this question at least once a quarter -- keeping ideas current</strong></td>
<td>3.52</td>
<td>3.41</td>
<td>3.47</td>
<td>Let's do it!</td>
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<tr>
<td></td>
<td>1. invite sales force to participate</td>
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2. invite product development and training staff also
3. Have management provide direct feedback to participants about action items that have been taken as a result of the ideas generated.
4. online meeting tools facilitate gathering, prioritizing and publishing of action plans (just as we are doing with this agenda)

Step 5: Action Plan - How will we act on our Ideas and Solutions?

1. **Cost out our initial recommendations**
   - Be prepared to make prioritized recommendations.
   - Assume budget limits of $10K, $50k and $100k.
   - Start Date: Mar 25, 2009
   - End Date: Mar 30, 2009
   - Percent Complete: 100%
   - Status: On Schedule
   - Who: Jane - Finance Team Member

2. **Prepare summary report of recommendations**
   - Presentation to Directors of Sales and Marketing at next directors’ meeting.
   - Start Date: Mar 28, 2009
   - End Date: Apr 7, 2009
   - Percent Complete: 90%
   - Status: On Schedule
   - Who: Peter - Team Leader
<table>
<thead>
<tr>
<th></th>
<th>Task</th>
<th>Start Date</th>
<th>End Date</th>
<th>Percentage</th>
<th>Status</th>
<th>Responsible Party</th>
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<tr>
<td>3.</td>
<td><strong>Meet with Director of Sales before next Directors' Meeting</strong></td>
<td>Apr 7, 2009</td>
<td>Apr 12, 2009</td>
<td>15%</td>
<td>On Schedule</td>
<td>James - Sales Team Member</td>
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<tr>
<td></td>
<td>Solicit his support. Identify questions that we need to be prepared to answer.</td>
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<tr>
<td>4.</td>
<td><strong>Meet with Director of Marketing before next Directors' Meeting</strong></td>
<td>Apr 7, 2009</td>
<td>Apr 12, 2009</td>
<td>15%</td>
<td>On Schedule</td>
<td>Sally - Marketing Rep</td>
</tr>
<tr>
<td></td>
<td>Solicit her support. Identify questions that we need to be prepared to answer.</td>
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<td>5.</td>
<td><strong>Make summary report adjustments based on Directors' input</strong></td>
<td>Apr 7, 2009</td>
<td>Apr 15, 2009</td>
<td>On Schedule</td>
<td>James, Sally, Peter</td>
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<tr>
<td></td>
<td>James and Sally to post recommended edits; Peter will be the master editor.</td>
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<td>6.</td>
<td><strong>Prepare report and distribute to Directors 5 days before their monthly meeting</strong></td>
<td>Apr 15, 2009</td>
<td>Apr 20, 2009</td>
<td>On Schedule</td>
<td>Whole Team</td>
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<td></td>
<td>Use FacilitatePro online tools to gather immediate feedback. Let's provide an avenue to gather input ahead of the meeting. Focus meeting on decisions and actions, rather than information exchange.</td>
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<td>7.</td>
<td><strong>Presentation to Directors Meeting</strong></td>
<td>Apr 20, 2009</td>
<td>Apr 21, 2009</td>
<td>On Schedule</td>
<td>Whole Team</td>
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<td>8.</td>
<td><strong>Bottom Line: Incorporate recommendations in December Business Plan</strong></td>
<td>Apr 21, 2009</td>
<td>Apr 30, 2009</td>
<td>On Schedule</td>
<td>Directors</td>
<td></td>
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<td></td>
<td>Part of annual business planning cycle.</td>
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