

*This is a sample report from a FacilitatePro web meeting. Full documentation is just one click away. Save reports in MS Word, MS Excel, PDF or HTML formats. Choose from several additional report formats with various levels detail and voting graph options are ready for printing at any time.*

## 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



**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.

1. case studies
2. tips and techniques
3. 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.

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

### 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.

1. look at online training options
2. 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.

1. 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)

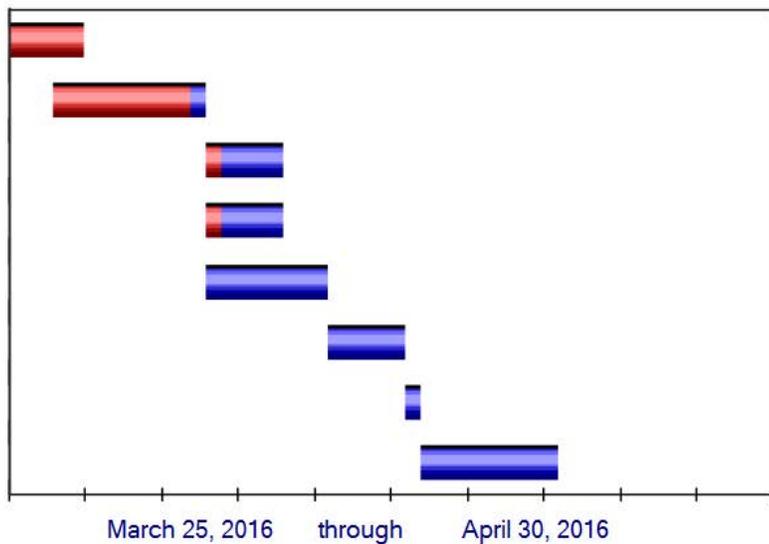
### Steps 3 & 4: Prioritize Solution Ideas - Impact and Feasibility

Web Site Marketing		Impact	Feasibility	Weighted	Quadrants
1.	<b>Update our web site</b> Add some new and more interesting content to keep bringing current and potential customers back. <ol style="list-style-type: none"> <li>case studies</li> <li>tips and techniques</li> <li>Articles and links to other interesting site.</li> </ol>	3.94	3.66	3.80	Let's do it!
2.	<b>Revisit web site indexing and key words</b> 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.	<b>Research other web sites and offer reciprocal links</b> 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. <ol style="list-style-type: none"> <li>Contact our current customers to find out what they are reading and their favorite web resource sites.</li> <li>look at industry association web sites</li> </ol>	3.27	3.36	3.31	Let's do it!
Sales Force		Impact	Feasibility	Weighted	Quadrants
4.	<b>Recruit more sales personnel - more feet on the street</b>	3.42	3.30	3.36	Let's do it!
5.	<b>Revise sales territories to more manageable size</b> 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.	<b>Sales force training</b> 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. <ol style="list-style-type: none"> <li>look at online training options</li> </ol>	3.60	3.60	3.60	Let's do it!
7.	<b>Create shared learning teams among sales reps across regions</b> 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!

	1. Search for technology to support this.				
<b>Working with our Distributors</b>		<b>Impact</b>	<b>Feasibility</b>	<b>Weighted</b>	<b>Quadrants</b>
8.	<b>Bring distributors in for updated training on new product line</b>	3.73	3.38	3.55	Let's do it!
9.	<b>Offer new incentives</b> e.g., Distributor of the Month award.	3.28	3.42	3.35	Let's do it!
10.	<b>Monthly newsletter for distributors</b> Keeping them current on new products, sharing success stories and sales tips, keeping them motivated.	3.22	3.53	3.38	Let's do it!
<b>Current Customers</b>		<b>Impact</b>	<b>Feasibility</b>	<b>Weighted</b>	<b>Quadrants</b>
11.	<b>Monthly newsletter for our customers</b> Email format provides cost effective way of distributing this. <ol style="list-style-type: none"> <li>1. Inform of special offers and new products/services.</li> <li>2. Featured customer of the month.</li> <li>3. Customer success stories - how our customers are using our products.</li> </ol>	3.31	3.31	3.31	Let's do it!
12.	<b>Online discussion forum - come meet other users of our products</b> Using online meeting tools (such as FacilitatePro!) to engage our customers in live discussion forums. Sharing ideas about how our products are being used. <ol style="list-style-type: none"> <li>1. Question and answer session with our experts.</li> <li>2. Test these ideas out with some of our current customers.</li> <li>3. Send them an online survey to find out what agenda items they would be most interested in.</li> <li>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.</li> </ol>	3.21	3.43	3.32	Let's do it!
<b>Other Ideas</b>		<b>Impact</b>	<b>Feasibility</b>	<b>Weighted</b>	<b>Quadrants</b>
13.	<b>Revisit this question at least once a quarter -- keeping ideas current</b> <ol style="list-style-type: none"> <li>1. invite sales force to participate</li> </ol>	3.52	3.41	3.47	Let's do it!

<ol style="list-style-type: none"> <li>2. invite product development and training staff also</li> <li>3. Have management provide direct feedback to participants about action items that have been taken as a result of the ideas generated.</li> <li>4. online meeting tools facilitate gathering, prioritizing and publishing of action plans (just as we are doing with this agenda)</li> </ol>				
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**Step 5: Action Plan - How will we act on our Ideas and Solutions?**



1. Cost out our initial recommendations
2. Prepare summary report of recommendation
3. Meet with Director of Sales before next
4. Meet with Director of Marketing before n
5. Make summary report adjustments based on
6. Prepare report and distribute to Directo
7. Presentation to Directors Meeting
8. Bottom Line: Incorporate recommendations

	Start Date	End Date	Percent Complete	Status	Who
<ol style="list-style-type: none"> <li>1. <b>Cost out our initial recommendations</b> Be prepared to make prioritized recommendations. Assume budget limits of \$10K, \$50k and \$100k.</li> </ol>	Mar 25, 20	Mar 30, 20	100%	On Schedule	Jane - Finance Team Member
<ol style="list-style-type: none"> <li>2. <b>Prepare summary report of recommendations</b> Presentation to Directors of Sales and Marketing at next directors' meeting.</li> </ol>	Mar 28, 20	Apr 7, 20	90%	On Schedule	Peter - Team Leader

3.	<b>Meet with Director of Sales before next Directors' Meeting</b> Solicit his support. Identify questions that we need to be prepared to answer.	Apr 7, 20	Apr 12, 20	15%	On Schedule	James - Sales Team Member
4.	<b>Meet with Director of Marketing before next Directors' Meeting</b> Solicit her support. Identify questions that we need to be prepared to answer.	Apr 7, 20	Apr 12, 20	15%	On Schedule	Sally - Marketing Rep
5.	<b>Make summary report adjustments based on Directors' input</b> James and Sally to post recommended edits; Peter will be the master editor.	Apr 7, 20	Apr 15, 20		On Schedule	James, Sally, Peter
6.	<b>Prepare report and distribute to Directors 5 days before their monthly meeting</b> 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.	Apr 15, 20	Apr 20, 20		On Schedule	Whole Team
7.	<b>Presentation to Directors Meeting</b>	Apr 20, 20	Apr 21, 20		On Schedule	Whole Team
8.	<b>Bottom Line: Incorporate recommendations in December Business Plan</b> Part of annual business planning cycle.	Apr 21, 20	Apr 30, 20		On Schedule	Directors