## Rational Aim: Do a check-in on previously identified key blocks and levers, both internal and external, ensuring that they are still accurate and add any new ones. Experiential Aim: Feel confident that the key leverage point and underlying blocks have been identified in order to understand the environment marketing being done in. Timing and Audience: 30 minutes with network leaders Materials and Setup: Markers and flipchart paper. List previous blocks and levers on separate flip charts; have additional flip charts - one labeled blocks and the other levers. Focus Question: “What are the levers and blocks that we will leverage, or work around, the process of moving toward our vision and project goals?” Opening: As part of our strategic planning process we did a very thorough analysis of our levers and blocks effecting our project. With the passage of time, it is important to take another look at those. Using the lens of potential customers, we are going to affirm the listed blocks and levers and add any new elements to the lists. We will share our past work and then, together, identify any new blocks or levers. We will gain an insight on what we can leverage and underlying issues we need to address as we get ready to develop our marketing plan. Current Situation (5 Min) Post the flip charts with the blocks and levers identified in the Strategic Planning process Read through the blocks and levers Discovery (10 Min) Ask: Are there any blocks or levers that have gone away? Ask: From your knowledge of the environment we are doing our work in, what are new blocks that should be listed? What are the missing things? Record these on the blank flipchart labeled ‘Blocks’. Ask: Let’s look at the flip side, what are the new levers in our environment? Record on blank flip chart labeled ‘Levers’. Analysis (10 Min) Of these new blocks: Which ones will impact the network? Which ones will impact the work plan? Of these new levers: Which ones will impact the network? Which ones will impact the work plan? Prioritizing (5 Min) The intent of this section is to prioritize underlying levers and blocks while transitioning to the next element of the environment, competitors. Have the group put a mark to prioritize: What are the top three levers and top three blocks that are critical in moving the project forward and marketing product and services? Closing: When marketing to our customers we must be aware of the environment we all are working in keeping this at the forefront as we move forward with marketing plan development. Another environmental aspect, that must be considered when doing a marketing plan, is competition. Move to competitionFacilitation Guide: Environmental Scan and Analysis Check-In

## Rational Aim: To identify competitors, internal and external, for potential product and services. Use this knowledge when moving forward with the marketing plan. Timing and Audience: 30 minutes with network members or stakeholders. Setup and materials: Markers. Flipcharts labeled: Competitors, Competitive Alternatives, Network Advantages, Competitive Advantage and Internal Competition. Focus Question: “Who are our network’s competitors?” Opening: Competitors are a part of the environment we are working in. Looking at competitors is often new thinking for networks. Most commonly, networks form out of identifying a gap in services, or a need of their customer or members. If there is a gap, the logical thinking is that there are not any competitors that will fill the gap or meet the need. We are going to challenge this thinking today. In some circumstances there is an entity, a competitor, that is able to fill the gap for your customer or member, or a competitor that is able to expand their services. Another way to think about competitors is that they are able to meet your members’ needs in alternative ways. For example, mass transit is a competitor of personal automobiles because it meets the need for transportation. We are going to take a bit of time to consider possible competitors for the services that our network is providing to our members. This effort will help us better design or deliver our network services. Ask the following questions of your marketing prework participants: For each of the pre-made flip charts ask the following questions and record the answers. Competitors: Who else can or might provide the same services offered by the network? Competitive Alternative: What are alternative ways your customers may accomplish the same objective? Network Advantages: Why is the network a better choice? Competitive Advantage: How will you ensure that your network’s advantage is possible? What is your competitive advantage? How have you differentiated your network from other organizations? Internal Competition: What is happening with network partners that could be signs of competition? Closing: This information gives us insights into our marketing environment so that we can better design, deliver or promote our services to our members. We will use this information (point to flip charts) as we move forward with our market planning process and in the business plan. Record this information in the Network Competitors worksheet. Facilitation Guide: Identifying Competitors

# Competitors Worksheet

Transfer the information from flip charts filled out during the Competitor Identification Facilitation. Add additional bullets as necessary. This information is part of the overall environment your network is doing its work in. Make sure to keep this worksheet, as you will need it for part of your business planning efforts in six months.

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| Network Competitor Analysis |
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## Rational Objective: Reach group consensus on the elements of the Product and Service Designer, member needs, potential product and services, and market segments. Experiential Objective: Agree that the identified member’s needs, and potential products will provide guidance to the organization over the coming two-to-three years. Feel comfortable expressing their ideas. Setup and Materials: Sticky wall or blank wall for displaying notes and writing markers. 100 half-sheets of paper and markers. Colored ½ sheets for naming in step 4 of process. Painter’s tape if needed. Copies of the “Designing Products and Services for Networks” worksheet for each participant and a master for the network. Timing and Audience: 3-4 hours with network membership. Opening: Together, we will be considering, “What products or services can our network offer and to what market segments.” In this discussion, we will begin brainstorming jobs, gains and pains about our members. We will move to identifying ways we as a network can help our members do their jobs. And finally, we will identify what our networks market segments are. We’ll then seek consensus in these various areas that will provide guidance to our network over the coming two-to-three years. Process: The four-step process outlined below will be repeated six times. Once for each of the six elements (jobs, pains, gains, pain relievers, gain creators, product and services) outlined in the “Designing Product and Service for Networks” worksheet. See pages 3-4 for specific guidance for introducing the “Brainstorming” exercise for each element. Brainstorm: (5 min) Individually brainstorm: Ask brainstorming questions for each element found on pages 3-4. Have each person compile a list of >10 ideas. After giving time for brainstorming, have each person review his/her list and star the 4-5 best ideas. Small Group Discussion (5 min) Working in pairs: Compare both lists and select the top 5-6 ideas. (Note: Need 30-35 total data pieces, assumes 6 pairs) Describe each idea using 3-5 words. Write one idea per half-sheet of paper. Ask small groups to be ready to share with the larger group, one idea at a time. Report Out: (10 min) Synthesize the data to identify key ideas. Sharing from small groups, one group at a time, until all ideas are shared. The intent is to identify the true needs of the networks members. Ask: What are the two clearest or most straightforward ideas? (Post on wall or record onto flip chart, moving to next group following a response.) Ask: What are different ideas or complex ideas? Continue around the small groups until all ideas have been shared. Identify Key Ideas: (10 min) Cluster data into similar ideas. What are the common threads in this data? (If using ½ sheets, move them together. If using a flipchart, use a shape or color to show connection.) Seek consensus on the key ideas by naming the clusters. For each cluster, ask, “In this cluster, what is the title that best describes the (element)?” Repeat the above process, using guidance from the following pages to introduce each element. The information on the wall or flipchart should be transferred to a “network master” to be used for market plan development. Move to identifying Market Segments after completing the above steps six times.Facilitation for Designing Products and Services

## Market Segments: The process is similar to the one for gathering information for the six elements. Brainstorm: (5 min) Individually brainstorm: Say: Carefully look at the network member list in the Starting With section on page 1 and the members jobs in Step 1: Members Needs Assessment. Brainstorm a list of Market Segments amongst current network members. Next look at the identified Product and Services on page 5 and continue to brainstorm possible segments beyond the member organizations that the product or service would benefit. Have each person compile a list of potential market segments. After giving time for brainstorming, have each person review his/her list and star the 4-5 best ideas. Small Group Discussion (5 min) Working in pairs: Compare both lists and select the top 5-6 segments. (Note: Need 30-35 total data pieces, assumes 6 pairs) Describe each segment using 3-5 words. Write one idea per half-sheet of paper. Ask small groups to be ready to share with the larger group, one idea at a time. Report Out: (10 min) Synthesize the data to identify key ideas. Sharing from small groups, one group at a time, until all segments are shared. The intent is to identify the potential market segments. Ask: What are the two clearest or most straightforward segments? (Post on wall or record onto flip chart, moving to next group following a response.) Ask: What are different segments you have identified? Continue around the small groups until all segments have been shared. Identify Key Ideas: (10 min) Cluster data into similar ideas. What are the common threads in this data? (If using ½ sheets, move them together. If using a flipchart, use a shape or color to show connection. Name them with colored half sheets.) Seek consensus on the key ideas by naming the clusters. For each cluster, ask, “In this cluster, what is the title that best describes the market segment?” Prioritize: Ask participants to come to the wall/board and put a mark on which market segment they feel is the strongest market segment. The one getting the most marks is the Target Market followed by the secondary market. Record these identified market segments on page 6 of the “Designing Products and Services for Networks” worksheet. Closing: Focused Conversation O: What is something from the day that you stood out for you or resonated with you? (Go around the room.) What was one thing that was a highlight, new discovery or a ‘WOW’ for you as we did this? (Go around the room.) R: What about the data up on the sticky walls make the most sense – which parts are most clear? Where were you really engaged in the process? Where did you find yourself hanging back or disinterested? What feelings or emotions came up for you? I: Anything that is a question for you or feels confusing or undone? What is the significance of the work we have just completed? D: Where are you the most excited or ‘can’t wait to get started? Thank them for coming and talk about the next formal steps, such as board approval or when the next meeting will be.

Element Description  Trigger Questions 
Jobs: Are the things your organizations are trying to get done, the problems they are trying to solve or the needs they are trying to meet.  Go beyond the functional tasks or surface problems and ask “why” – go deeper. 
Consider the social jobs; how the member wants to be perceived by others (i.e. looking good with clients). 
Go into the emotional jobs; the specific emotion the member wants to feel. (i.e. feel confident, excitement accomplishing a goal). 
Pains: Frustrations you experience while trying to achieve the goal, the job or solve the problem. Describe the negative emotions, challenges, risks and undesired costs that members experience before, during or after getting the work or job done. Make sure to quantify (i.e. waiting 10 minutes)
What are the frustrations, annoyances, or things that give you a headache? 
What is missing from current product and services? 
Are there performance issues or annoyances? If so what are they? 
What are the mail difficulties and challenges encountered? 
What things do you have difficulties doing? 
What negative social consequences do you encounter? (loss of face, trust, power or status) 
What are your fears? (financial, social, not accomplishing goals, technical risks)
What is keeping you awake at night? 
Gains: Benefits and outcomes you experience while achieving the goal, “job” or solve the problem. They describe the positive emotions, functional utility, social gains and cost savings that members experience or wish to experience before, during or after getting the work or job done. 
What savings would make you happy? (time, money, effort)
What quality levels do you expect and what would you wish for more of? 
What specific features of a service would you enjoy having available to you? 
What would make your jobs or lives easier? 
What positive social consequences do you desire? (look good, increase in status, increase in power) 
What are you looking for the most? (good design, ease of use, specific features) 
What do you dream about? (having, aspiring, bring big relief) 
How do you measure success or gauge of performance?

Pain Relievers: What can the network do to relieve the PAINS? How you can eliminate or reduce the things that annoy your members before, during and after doing their jobs. How can our network help:
Produce savings in terms of time, money or effort? 
Make members feel better by decreasing annoyances and frustrations? 
Fix underperforming issues by introducing new features, better performance, enhanced quality? 
Put an end to difficult and challenging situations and eliminating obstacles?
Wipe out negative social consequences members face?  (loss of face, trust, power or status)
Eliminate risks or fears? (financial, social, not accomplishing goals, technical)
Help you sleep better at night? 
Gain Creators: What can the network do to create the GAINS? How you can create outcomes and benefits your members expect. How can our network help:
Create savings in terms on time, money or effort?
Produce outcomes the exceed expectations? 
Make work easier? 
Provide a service that would delight our member? 
Create positive social consequences? (look good, increase in status, increase in power) 
Fulfill a dream? (having, aspiring, bring big relief)
Product and Services: What the network can deliver based on the pain relievers and gain creators.  
What are products or services the network does or could deliver?  
What do we have the internal infrastructure to do? 
What do our members need most? 
What can make a difference for the communities we serve?