

The Territory Navigator

Workshop Preparation Kit

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Congratulations! You are going to host an all-day workshop for your territory managers (TMs) titled, “The Territory Navigator”.

To help you have a successful workshop, I have prepared this workshop pre-meeting kit to assist you in planning your event. As you work your way through the process, you may want to check off the boxes.

8 Weeks or More Before Your Workshop

- Schedule and book the workshop with Lodestar. (You have already done this.)

6 Weeks Prior to the Workshop

- Determine the workshop expenses.
- Invite your TMs.
- If you need to order audio-visual equipment, schedule it now. If you have it on hand, skip this step. Equipment needed: computer VGA projector and screen; flip chart with 1 full pad of paper.
- If you decide to hold the workshop off-site, make arrangements for a meeting location. If you go off-site, remember to make arrangements for lunch or dinner (depending on when you decide to start your workshop) and early and late refreshment breaks.

2 Weeks Prior to the Workshop

- Call any TMs who have not responded to the invitation letter and confirm their attendance.

1 Day Before the Workshop

- Make sure the room is set up per the attached room set-up diagram.
- Make sure the audio-visual equipment and flip chart are set up and ready to go.
- Make sure the meal (lunch for an 8:00 - 5:00 workshop, dinner for a 1:00 - 9:00 workshop) is set.
- Make sure the breaks are set up. For an 8:00 - 5:00 workshop, you need to have coffee/tea on hand when your customers arrive; donuts and fruit are optional. Plan on a

mid-morning break (around 10:00 am; refresh the coffee; add soft drinks) and an afternoon break (around 2:30 pm; soft drinks).

For a 1:00 - 9:00 workshop, have soft-drinks and coffee on hand when guests arrive; first break (around 3:00) to be coffee, soft drinks; late break (around 7:30 pm) of coffee, soft drinks.

Day of the Workshop

- o Make sure your welcomer will be present and has appropriate welcoming comments ready.

- o One hour before the meeting starts, make sure the opening refreshments are out and ready and that the caterer is on schedule for the first and second breaks and meal.

TM Checklist (what to bring to the workshop):

- Laptop **computer**
- Printer** (may team up with 1 or 2 other TMs)
- Paper**—allow at least 10 pages per county assigned to you
- List of all the **counties** in your assigned territory (whether you have accounts in them or not)
- List of all your **accounts**; if possible, include the number of people they employ
- Purchase history** of your accounts, showing total purchases from you the last three fiscal years
- If available, **gross margin** generated per account for the last three fiscal years
- Your sales **quota** for next year
- A highway **map** of the state(s) you cover and three different color highlighters (suggested: pink, blue and yellow)
- Pen, paper, and pocket **calculator**

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Workshop Fee Calculator

Item	Quantity	Cost Ea	Net Cost	
Facilitation Fee	1	\$6,000	\$6,000	
Travel expenses (estimated)	1	\$	\$	
Workbooks		\$	\$	
Arrival refreshments		\$	\$	
First break		\$	\$	
Meal		\$	\$	
Second break		\$	\$	
Audio-visual: VGA projector/screen	1	\$	\$	
Audio-visual: flip chart/pad	1	\$	\$	
Room rental	1	\$	\$	
Trinkets you may wish to give away		\$	\$	
Other:		\$	\$	
Total workshop costs				
Less manufacturer co-op (check with manufacturer first)				\$
Total expenses (costs less co-op)				\$

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Room Layout Diagram

