**IBM Software Executive Briefing Centers:
Gaining Ground in Reporting**

Prepared for:
Dan A.
Business Unit Leader
IBM Software Executive Briefing Program – Worldwide

Prepared by:
Elizabeth Bailey and Tammy Clark
Graduate Candidates
Masters in Instructional Technology Program
University of North Carolina – Wilmington

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Contents

Executive Summary

The IBM Software Executive Briefing Centers (SW EBCs) are a worldwide IBM program designed as a sales tool for the IBM software sales force. There are currently nine centers located around the world. The relevant operating system includes the IBM SW EBC program as a whole, including upper management, the individual briefing centers, and all of the employees within the individual briefing centers.

The SW EBC program tracks data on all briefings and other activities conducted in the SW EBCs. The purpose of the reporting is to measure the performance of each individual center and of the SW EBC program as a whole. Each briefing center is responsible for reporting its own monthly activity. This monthly performance report is submitted to the SW EBC program manager who serves over all of the software briefing centers.

The current margin of error within the reporting structure each month is 11-12%. The SW EBC Program Manager wants a reduction of errors to an improved margin of error of 2-3% in 2006. There is varied consistency between the briefing centers' reporting methods, leading to errors in the monthly performance reported by each center.

The probable causes for the inconsistencies and reporting errors are the gaps between what is currently happening in the process of data calculation for the monthly performance report compared to how the data should be calculated. Currently, each center determines its own methods for calculating data for the performance report. There is not a documented policy and procedure in place for the data reporters to follow when calculating and collecting data for the performance report. In addition, the data reporters are not trained for this job function.

Several possible solutions to the SW EBCs' problem were considered for the intervention. They were instructor-led teleconference training, instructor-led classroom training, a shifting of reporting responsibility to one person who represents all centers, and revising the automated reports within the MarketBound database system.

The solution recommended within this report is a two-tiered process. First there would be revisions made to the automated reports within the MarketBound database system. Once the revisions were made, instructor-led classroom training would be given to all of the SW EBC managers, who would in turn deliver the training to their respective offices.

The Systems

IBM is the world's largest information technology company employing approximately 329,000 people in 75 countries worldwide. IBM's revenues in 2004 were $79.6 billion. IBM is aligned to focus on one single business model of innovation. Within IBM there are six business operations: Hardware, Software, Services, Financing, Research and Technology. The business operations are housed on large campuses in key locations throughout the world.

The IBM Software Executive Briefing Center organization is a division of IBM Software (Figure 1, Appendix A) and is the identified system for changes in the methods of reporting their monthly statistical data. The headquarters of the Software Executive Briefing Center organization is located in Austin, Texas, on one of many IBM campuses. The briefing center program manager oversees the operations of each briefing center.

There are nine Software Executive Briefing Centers (SW EBCs) worldwide. The nine center locations are Austin, Texas; Boeblingen, Germany; Cambridge, Massachusetts; Hursley, England; Montpellier, France; Research Triangle Park, North Carolina; Rome, Italy; Silicon Valley-San Jose, California; and Toronto, Canada. Each SW EBC office operates independently of each other. Each SW EBC has a briefing center manager and who reports directly to the SW EBC program manager, as well as a team lead who reports directly to the briefing center manager. Each SW EBC employs briefing coordinators and briefing associates for administrative support of each center.

On the IBM Austin campus, where the Software Executive Briefing Center organization is located, there is a Site Education department. The Site Ed. department works with each of the business operations housed on the IBM Austin campus, including the Software Executive Briefing Center organization, to design and develop training and presentation materials.

The purpose of IBM's software business operation is to connect operating systems, business processes and applications seamlessly. Likewise, the mission of the SW EBCs, as a sub-unit of the software business operation, is to help the software sales force to sell more, faster by delivering customized briefings that leverage subject matter experts in a professional environment which is dedicated to creating a first class experience for clients. Briefings can be tailored to an individual client's situation or to a common theme if there are multiple clients visiting in one event.

The Problem

The Software Executive Briefing Center (SW EBC) organization within IBM tracks data on all briefings and other activities conducted in the SW EBCs via a report developed using Lotus 1-2-3, which is the Lotus spreadsheet application. The purpose of the reporting is to measure the performance of each individual center and of the SW EBC program as a whole.

There are nine IBM Software Executive Briefing Centers located throughout the world, each of whom use the same Lotus 1-2-3 spreadsheet for reporting purposes. Currently, each briefing center is responsible for reporting its own monthly activity via an assigned member of each team – the data reporter – who is typically a briefing coordinator or briefing associate. The monthly report is generated first by each center's data reporter and then compiled into one report by the Silicon Valley EBC's data reporter to be submitted to the SW EBC program manager as one cohesive report. There are varied calculations currently being used among the centers for the various fields within the report, causing a margin of error of 11-12%.

The SW EBC monthly report tracks data on all briefings and other activities conducted in the SW EBCs as they relate to the mission of the organization as a whole – to sell more, faster. The report includes the following data for each center (Figure 5, Appendix A):

- Number of briefings
- Number of customers
- Number of accounts
- Potential revenue
- Number of briefing days
- Overall Assessment
- Number of business partner (BP) briefings

- Number of briefings that cancelled
- Number of briefings that postponed
- Number of other activities

The errors that are occurring in the report are widespread. First, the automated reports in the MarketBound database system do not automate the information for every field in the monthly report, meaning some information has to be counted manually which naturally generates human errors. Next, some data reporters are not even aware that the automated reports within MarketBound exist, causing even more human errors from manually counting the data for every field in the report.

Additionally, some of the fields in the monthly report are being manually calculated incorrectly among the briefing centers, specifically:

- **Number of customers:** Briefing attendees in MarketBound are classified as customer attendees, IBM attendees, and other attendees. Some centers count the number of customer attendees only, and some count a combination of customer and IBM attendees, customer and other attendees, or all three classifications of attendees.
- **Number of business partner briefings:** The briefing centers classify business partner briefings differently from each other, and therefore some centers report an inflated number of business partner briefings while others report a deflated number.
- **Overall Assessment:** Each briefing that is conducted in the SW EBCs is evaluated by all of the briefing's attendees. So, each briefing manager receives an evaluation for each briefing he manages, and MarketBound not only lists the individual evaluation for each briefing, but it also automatically calculates the overall average per month for each briefing manager. Unfortunately, MarketBound does not calculate an overall average for each briefing center as a whole on a monthly basis, so the

center's monthly score for the report's purposes has to be manually averaged by the data reporters. The data reporters are calculating this field incorrectly by averaging the briefing managers' monthly totals against each other, which does not give an accurate weight to the evaluation numbers. The data reporters who are calculating this field correctly are actually averaging each individual briefing evaluation number that the center completed during the given month.

- **Number of other activities:** The briefing centers classify other activities (events which can not be defined as a briefing but which utilize the EBCs' time/space/budget) differently from each other, and therefore some centers report an inflated number of other events while others report a deflated number.

The SW EBC program manager wants a reduction of errors in reporting from the current margin of error of 11-12% to an improved margin of error of 2-3% in 2006.

By lowering the current margin of error caused by variations in consistency in reporting from 11-12% among the briefing centers to the desired margin of error of 2-3%, the SW EBC program manager will have good, true, correct, and substantial information when reviewing the productivity and performance of each center, as well as when presenting it to his superiors. The information is important for upper level management so that they can see the value the SW EBCs' briefings to the software business operation of IBM.

Operating System Analysis: What is the operating system like now?

METHOD

The initial conversation originated with the SW EBC program manager, who stated that there was a problem in the monthly performance report that is submitted to him by each briefing center. To determine the present status of the system, data and information were gathered from various resources.

To understand the process of collecting and reporting the data of the monthly performance report we interviewed the data reporter from the SW EBC in Austin. At this interview we were able observe her as she compiled the data for the performance report. We were able to collect a copy of an actual report and follow her through the process of collecting data for each area on the monthly report. From this interview, we were able to take notes of key areas that were subject to interpretation by each data reporter and ask questions on how the data was currently being collected and where the figures were coming from and how they were calculated. We obtained a copy of the previous year's monthly report, an organizational chart, and documents that gave us the mission of the SW EBCs along with general information about the SW EBC organization.

RESULTS

Real Objectives:

The stated objective of the SW EBCs is to help the software sales force sell more, faster. In order to track the performance of each SW EBC, a compiled monthly performance report of each SW EBC's activities is generated for the SW EBC program manager. The real objective of the IBM Software Executive Briefing Center organization is to have an accurate and consistent reporting method to track the performance from each of the SW EBCs in order to prove to upper management the value that the SW EBCs bring to the IBM Software organization.

Present Activities:

Currently, each of the centers' data collectors is instructed by their respective manager how to collect the data for each of the required components of the monthly report.

As a briefing is requested by the software sales force, the client's sales representative completes a form on the IBM Intranet, which is deposited into the respective briefing center's MarketBound database. All of the information pertaining to each briefing is stored in this form, including all of the data which is compiled for the monthly report.

When the request form is first received in the center's MarketBound database, it can be found in the New category. From there, it is moved to different categories within the database depending on the status of the briefing: Confirmed, Completed, Cancelled, Postponed, etc. After the form is submitted by the requester, it subsequently can be accessed within the MarketBound database for briefing center personnel to make changes and additions to the information as needed, or through the IBM Intranet by the requesters.

Within the MarketBound database system, there are automated reports that are generated from the data that has been input into the briefing request form. At the end of each month, the data reporter uses this information to produce a final monthly figure for each category for his/her center. Some of the categories of information come straight from the report and do not need any further calculation or interpretation, such as the number of briefings.

Other categories require that the data reporter perform additional calculations. As an example, after each briefing, the center where the briefing was conducted is evaluated on its performance by both the non-IBM and the IBM attendees. The evaluation uses a rating scale of 1 to 5 in determining the quality of

performance of each briefing, with 1 being the highest mark and 5 being the lowest. If the data reporter takes the average of each person's rating and then averages this figure, the total will not be accurately weighted.

Another area is defining what data is considered within a specific category on the monthly report, such as the collection of data for other (non-briefing) activities performed within each center. Without a clear definition of what constitutes other activities, the overall activity performed by a briefing center can be skewed. For example, one center may not have as many briefings for a given month, but the additional time in other activities that the center was asked to perform could outweigh the number of briefings held at another center.

Once all of the categories for the report are calculated and entered for that center, the report is submitted to the Silicon Valley EBC's data reporter. The Silicon Valley data reporter compiles all of the data into one cohesive report, which is then submitted to the SW EBC program manager for his review and use.

Important Side Effects:

This report is a high priority for the data reporters and is time sensitive. There is frustration among the data collectors for the time and effort that is put into the report and yet it is not heavily weighted. The average length a person stays in the position of a data collector is just under three years, which is below the IBM average length of employment.

Because of the current inconsistency of reporting, and the errors that are created by these inconsistencies, the briefing managers' work is not being accurately reflected in the report. As a result, the hardest working briefing managers move into different positions within IBM.

Relevant Resources:

Currently in place by the entire IBM briefing center organization is the MarketBound database system, a highly complex, homegrown briefing management application. The database system correctly contains all of the data that is required to be collected from each center. The constraint within the MarketBound database system is within the fields where the monthly data is collected. The necessary figures are present, but in some instances, the data collector is required to manually compile data from various fields.

On the Austin Campus, where the Software Executive Briefing Center Organization is located, there is a Site Education department. The Site Ed. department works with each of the business operations housed on the IBM Austin campus, including the Software Executive Briefing Center organization, to design and develop training and presentation materials.

All of the SW EBCs have multiple conference rooms dedicated to holding customer briefings and other events. The number of conference rooms at each center varies. In addition to the customer spaces at each of the SW EBCs are employee spaces where the staff conducts their daily business activities. Each staff person has an assigned workstation which includes a laptop or desktop computer loaded with the MarketBound database system.

Fixed Constraints:
- The monthly reporting of all categories listed within each briefing center.
- Instruction by each of the SW EBC managers on how each of their data collectors should collect the data for each of the required components of the monthly report.
- The turnaround time to produce the month-end performance report.
- The MarketBound database system.

From talking with the program manager, the items listed above were the rules currently in place and followed by each of the SW EBCs.

How the System Is Managed:

Each briefing center manager manages his/her respective center(s) and has authority within the center to make day to day operating decisions for his/her EBC branch(es). The data reporters, who are Briefing Coordinators or Briefing Associates, within each center report to the manager of that briefing center (Figure 1, Appendix A).

Any decisions made that would affect and change procedures or policies within all of the briefing centers come from the SW EBC program manager.   If one briefing center manager were to desire a change that would affect all of the centers, the change would not be adopted consistently throughout each SW EBC center unless it came down from the SW EBC program manager.

The data reporter reports to the briefing center manager and would not receive new instructions for reporting methods from another center manager unless that briefing center manager was designated to deliver instructions via the SW EBC program manager.

Operating System Analysis: What should the operating system be like?

METHOD

To determine what the operating system should be like, data and information were gathered from various resources. In order to get a better pulse on what should be happening within the system, interviews and observation were conducted, as well as documents and processes reviewed.

The initial conversation originated with the SW EBC program manager, who determined that there was a problem in the monthly performance report that is submitted to him by each briefing center. The program manager gave immeasurably valuable input regarding the way that the reports needed to work as opposed to the way they were actually working. He gave us clear definitions for each field in the report and how he expected each center to calculate them. In addition, the program manager gave us some insight into additional points of data he would like to see reported on a monthly basis, such as number of Government Owned Entity (GOE) customers and year-to-year comparisons between the individual centers and the software briefing program as a whole.

The manager and the data reporter from the SW EBC in Austin were interviewed for further investigation. They corroborated what the SW EBC program manager had outlined to us, and they also helped us to understand the difficulties in working with the automated MarketBound reports and how some of the report's fields were open to interpretation. The data reporter let us observe her as she compiled the month's numbers and the pains she had to go through with the manual calculations.

After the interviews and observations, we were given access to the briefing program's year-to-date report after all of the individual centers had submitted their month's numbers. The Austin data reporter, who has access to all of the centers' database contents, went through and showed us how incorrect

calculations were in certain centers' fields and the results that should have been in evidence. This served to prove many of the side effects that were present and should not be.

RESULTS

Real Objectives:

With regard to the monthly reporting structure, the real objective of the IBM Software Executive Briefing Center organization should be to exceed the monthly and yearly briefing number targets imposed on them by upper management. A follow-on objective should be to institute an accurate and consistent reporting method among all of the SW EBCs in order to give a true portrayal of the centers' activities to prove to upper management the value that the SW EBCs bring to the IBM Software organization. This should require a consensus from all of the briefing center managers and ultimately the mandate from the SW EBC program manager so that all of the centers, including EBC management and data reporters, will buy into the new process and the importance and value of reporting the monthly statistics with integrity.

Activities:

The process for calculating and defining various fields within the report should change as follows:

- **Number of customers:** This number should be a sum of all non-IBM attendees. MarketBound should automate this number so that no manual calculations should have to be made by the data reporters.
- **Number of business partner briefings:** Business partner briefings should be defined as only those briefings which are requested by an IBM business partner who is bringing their own clients to an IBM SW EBC. MarketBound should automate this number so that no manual calculations should have to be made by the data reporters.

- **Overall Assessment:** The overall assessment should be the combined evaluations of all IBM and non-IBM attendees. Likewise, each briefing conducted within the EBC during the month should be given equal weight in the center's overall assessment average. MarketBound should automate this number so that no manual calculations should have to be made by the data reporters.
- **Number of other activities:** Other activities should be defined as events which can not be counted as a briefing but which utilize the EBCs' time/space/budget. MarketBound should automate this number so that no manual calculations should have to be made by the data reporters.

Important Side Effects:

After the deficiencies in the SW EBCs' monthly reporting structure are reduced or eliminated, an important side effect which should occur is that the data reporters are no longer frustrated to the point of leaving their positions in an untimely manner. A cohesive reporting structure should help the data reporters with the time sensitive nature of the monthly reports and to feel more satisfaction in this aspect of their jobs.

Another side effect which should occur is that the hardest working briefing managers should be retained in their positions for longer if their work is more accurately reflected in the report. The briefing managers should be recognized for their exceptional efforts, and therefore motivation and satisfaction should run at a higher rate within the briefing center program.

Relevant Resources:

A resource which should be used for the reporting process and which is already in place by the entire IBM briefing center organization is the MarketBound database system, a highly complex, homegrown briefing management application. The database system correctly contains all of the data that is required to be collected from each center. The constraint within the

MarketBound database system which should be eliminated is within the fields where the monthly data is collected. In order to eliminate many, if not all, of the errors in reporting, the data collector should not be required to manually compile data from various fields. Not only are manual calculations needlessly time consuming, but they also leave room for interpretation and human error. Therefore, the MarketBound system should be revised to make automated calculations which can then be input into each center's monthly report by the data reporter.

A second resource which should be used is a briefing center manager who will serve as the reports lead, thereby taking the lead on the reporting cause and being the liaison between the briefing centers and the program manager.

Fixed Constraints:
Based on the interview with the SW EBC program manager, more data should be collected on a monthly basis in order to recognize and understand the briefing trends, as well as to show to upper management how the briefing centers consistently improve and drive more business for IBM Software. They are below:

- Number of Government Owned Entity (GOE) briefings
- Month-to-month comparisons among each individual briefing center
- Month-to-month comparisons of the EBC program as a whole
- Year-to-year comparisons among each individual briefing center
- Year-to-year comparisons of the EBC program as a whole

The other constraint within the organization is the MarketBound database system, which is where all of the reporting figures should originate.

How the System Should Be Managed:
Since the managers from each center are not open to collectively changing their methods for reporting unless a change of data collection comes from the SW

EBC program manager, first and foremost a mandate for change must come down from the program manager. Once he has given the changes his blessing, one briefing center manager should be assigned by the program manager to lead all of the centers in the reporting initiative. The reports lead should be well-versed in what the program manager expects, and he/she should be available to consult with each briefing center manager and data reporter when questions and issues arise.

Probable Causes of the Problem

As evidenced by a performance analysis and data gathering process, there are several probable causes (Figure 3, Appendix A) of the SW EBC program's reporting problems (Figure 2, Appendix A). There are substantial gaps between what is currently happening in the system compared to how things should be happening, and a complete analysis has indicated that the system of reporting within the IBM SW EBC program is ineffective. Those gaps indicate the probable causes and are outlined below.

The probable causes of the reporting problem fall under three different categories: lack of skills/knowledge, motivation/incentive, and working conditions. As stated in the above paragraph, there are several probable causes of the problem, and the majority of them fall under the lack of skills/knowledge category. The motivation/incentive category houses the next number of causes, and working conditions has a few causes.

Our complete analysis of the problem shows that there is a severe lack of skills and knowledge among the data reporters in the SW EBC program. First, according to interviews with managers as well as interviews with and observation of a sampling of data reporters, the data collection methods among all of the briefing centers lack consistency, which results in errors, with each center determining its own methods of data collection. Second, no communication methods are in place for publicizing the automated reports which are available through the MarketBound database system. Next, there is not an established policy and procedure for the data collection process. Fourth, and very importantly, the data reporters do not have enough knowledge regarding the process to generate an accurate report. Fifth, no clear instructions exist for what the "overall assessment" and "# of customers" categories mean. And last, there is no central method for logging and reporting "other" (non-briefing) events, nor any established criteria for what even constitutes an "other" (non-briefing) event.

Our complete analysis also shows a severe shortage of motivation and incentive for those conducting the data reporting for each of the IBM SW EBCs to make any changes in the way they are currently collecting their center's data. Each SW EBC's data reporter is collecting the data for the performance report based on the instructions given to them by their manager. The managers in each SW EBC are not given a written policy or procedure on how the center should collect the data. Each of the data reporters is collecting their center's data, and with each center determining its own methods of data collection with regard to calculations and field definitions, the methods among all of the centers lack consistency and therefore generate errors. Next, the SW EBC program manager does not have confidence in the accuracy of the monthly reported data, and with individual and organizational reviews stemming from the monthly numbers, motivation is down. This item is also stemmed from data reporters calculating various fields differently from each other, most specifically the "overall assessment" category. The data reporters are not giving the correct weight to each evaluation score when calculating the "overall assessment" category, which means that some centers' overall scores are going to be inflated while others' are going to be deflated, giving an incorrect appearance of each center's performance. Last, and very importantly, the role of data reporter is assigned to employees without the training to accompany it. Since the data reporters are not given clear instructions and procedures for carrying out the task, it leaves many items open for interpretation, resulting in inconsistent data between centers which leads to the errors in the overall performance report.

Not only is there a severe lack of skills and knowledge, but poor working conditions mainly in the form of managerial leadership has led to the performance deficits. Two main culprits lead the pack under the working conditions category. First, there is no management consensus of the correct data collection procedures. Without this, all of the centers interpret the fields how they see fit, ending in varied reporting results between all of the centers based on

inconsistent reporting methods. Second, there is no management consensus for calculating various fields or establishing criteria for others. Examples include how to calculate the "# of customers" field, the "overall assessment" field, and what constitutes an "other" (non-briefing) event.

Possible Solutions

Four viable solutions to the SW EBC program's reporting problems are listed and described below (Figure 4, Appendix A).

- Instructor-led teleconference training for all data reporters

- Instructor-led classroom training for all data reporters

- Train one person to perform the reporting for all nine centers

- Revise the automated reports within MarketBound database system (Two-tiered process with training following the completion of the changes to the database system)

Instructor-led teleconference training for all data reporters:

The SW EBC program manager could request the Austin Site Ed. department to develop a training program to be delivered as a teleconference training session. The teleconference would be delivered simultaneously to all briefing center managers. Each manager, physically located throughout the world, would be expected to be available regardless of the time the teleconference was scheduled. After the completion of training, each manager would deliver the instruction to their staff in their respective location.

Instructor-led classroom training for all data reporters:

The SW EBC program manager could request the Austin Site Ed. department to develop a training program to be delivered as classroom training to the managers. All of the SW EBC managers come to the headquarters for quarterly meetings. The instructor-led training would be delivered to the managers at the next meeting.   After the completion of training, each manager would deliver the instruction to their staff in their respective location.

Train one person to perform the reporting for all nine centers:

The SW EBC Program Manager could identify one briefing center and appoint the manager and data reporter of the chosen briefing center to be responsible for the data reporting of all nine briefing centers. The appointed briefing center manager would be expected to allow the data reporter of that center to be relieved of additional duties during the month end reporting period to complete the report, or the data reporter appointed to the assignment would be expected to work additional hours to complete the report at the end of each month. After the completion of training, the data reporter would be expected to follow the procedure delivered in training to collect the required monthly data.

Revise the automated reports within MarketBound database system:

This solution would be a two-tiered process. The SW EBC program manager could request the IT department within IBM to make revisions within the MarketBound database system to create new fields and/or clearly define existing fields for collecting data without the need for additional manual calculations. Once the changes were completed, the SW EBC program manager could request that the Site Ed. department develop a training module to be delivered to each SW EBC manager.

Analysis of Solutions: Instructional Development and Delivery Capabilities

There were four viable solutions identified to address the inconsistencies of the current reporting methods of collecting data for each SW EBC's month-end reporting.

One option of training is to provide instructor-led training via teleconference. This would require the SW EBC program manager to request the Austin site ed. department to develop a teleconference training session. Once this request was made, the program manager would appoint a SW EBC manager to provide materials and information needed by the in house training department to complete the teleconference training. Each center is equipped with the equipment to deliver the training, and the time required to develop the training falls within the constraints of the system.   However, the SW EBCs are located throughout the world. In order to deliver the training via teleconference, the fact that SW EBCs are located within various time zones throughout the world would be a critical component. The briefing center managers, depending on their location, may be required to attend the training outside of work hours. It would be critical for every manager to participate, which would not allow for any flexibility. The environment, space and equipment requirements, while being a critical factor in the delivery of training, would not be a problem for the SW EBCs since their locations are already equipped for teleconferences and since each employee has a dedicated workstation they could view computer-based materials, if any. The additional cost incurred to deliver training via teleconference would be the cost of the international conference call, which would last several hours. This type of delivery system may not be well received with the SW EBC managers.

Another option of training is to provide instructor-led training via classroom instruction. Again, the initial request for the development and delivery of a training program would come from the SW EBC program manager. A SW EBC

manager would be assigned to work with the in-house training department to provide them with necessary information and materials. Currently, all of the SW EBC managers come to the headquarters for quarterly meetings, so the instructor-led training would be part of the next meeting's agenda. The time for the managers to meet in Austin for instructor-led training is already scheduled and there would not be any additional costs for flights or accommodations.   The space and equipment needed to conduct the training have already been allocated for the quarterly meeting and would be a positive factor for training.

Another solution to the problem of inconsistent data collection throughout the SW EBCs would be to appoint one SW EBC manager and data reporter to be responsible for all of the centers' month-end report. This solution would have the greatest effect of change to the organization. While this solution would solve the problem of consistency throughout the SW EBCs, management and the data reporters may view this change as a negative solution. Eight of the SW EBCs may feel that a job function has been taken away unfairly because they were performing the job incorrectly and yet had never been trained properly. The manager and the data reporter, given the task of producing the report, will have additional responsibilities and workload placed on them. The assigned data reporter would have to work with all of the SW EBCs to verify that all relevant data has been submitted by each center before producing the report. The month-end reporting is a time sensitive report and the additional responsibility may result in additional overtime hours each month.

One last solution considered is to revise the automated reports within the MarketBound database system. This solution is a two-tiered process. First, it would require the IT department within IBM to reconfigure the MarketBound database system. The SW EBCs have the resources to make this change, and once these changes were completed, all of the SW EBC managers would still require training of the new reporting procedures. If the automated reports within MarketBound database system were revised and then the training needed to

learn the process for collecting data was delivered, the training would not be as complicated and there would be less probability for errors to occur. It would also reduce the time needed to generate the monthly performance report.

It is clear, from the results of our analysis, that training is the solution to the problem of inconsistencies of reporting methods with in the SW EBC's. There is not currently a training process and procedure to collect data properly in place or a consensus from management on the correct procedure to collect the data. There are also areas within the report that are not clearly defined. The SW EBC's organization has the resources available to develop a training program for the job function.

Analysis of Solutions: Solution Comparison

The Solution Analysis Matrix (Figure 4, Appendix A) lists each possible solution and the factors that are taken into consideration in the analysis of each possibility. After completing the matrix and reviewing the positive and negative considerations of each possible solution, it was apparent that the best solution would be a two-tiered process of revising the automated reports within the MarketBound database system and then provide instructor-led classroom training to the managers at the next quarterly meeting.

The SW EBC organization has access to utilize the skills and resources of the Site Ed. and IT departments. The time to revise automated reports in the MarketBound database system and the time and resources needed to create and develop an online training program falls within the required time allotted for improving the margin of error in the data collection method. Once the revisions to the automated reports have been made, the instructor-led training will be developed. With a training program with a clear process on collecting the data from the revised automated reports, there will be consistency from center to center.

If only one data reporter is assigned to the task, training would still be a requirement and the additional time required to perform the time sensitive report along with the organizational changes that would occur did not justify the solution. Once it was apparent that a two-tiered process of revising the automated reports and training was crucial to the solution, we had to further explore which method of training best fit the organization.

The Recommended Solution

The solution that we recommend for the IBM Software Executive Briefing Center program is a two-tiered process with 1) revision of the automated reports within the MarketBound system, and 2) instructor-led training via classroom instruction. This option makes the most logical sense on all aspects, including time, environmental considerations, organizational change, space and equipment requirements, cost, benefit and loss to individuals, and benefit and loss to the organization.

The SW EBC program has access to an in-house IT department which will be utilized for the changes within the MarketBound system. This IT department is located within the Silicon Valley EBC team and is responsible for the creation and development of the MarketBound system. There are two dedicated resources on the team to enhancing MarketBound who will be utilized for the first tier of the solution.

The request for the instructor-led classroom training will be initiated by the SW EBC program manager. The Austin Site Education department, which will be utilized as both the development and delivery systems, is already in place and has the resources, knowledge and workforce to create the necessary training. Once the request for the training is made, the program manager will assign one briefing center manager to lead all of the centers in the training initiative. The assigned manager will work with the Site Ed. to supply them with any documents and information they need to develop the training module. Initially, there will be time required from the assigned manager to be the reports lead, but once development of the initial training module is completed, the time will be minimal. Austin Site Ed. is available to any organization on the IBM Austin campus, and they will be able to work with the EBC program manager and the reports lead to develop the material for the training and subsequently deliver it to the briefing center managers.

As stated in the previous section of this report, the training will be conducted for all of the briefing center managers during their next quarterly meeting in Austin, Texas. The briefing center managers will learn the new functions within the MarketBound automated reports, as well as the proper procedures for calculating and entering the correct data into the monthly report. The briefing center managers will then take training materials to their respective briefing centers and train not only the data reporter, but also the entire staff since all members of the EBC staff have their hands in the MarketBound request forms at one point or another during the briefing process. This will help ensure accurate data is entered into the forms before the data reporters ever extra the data for the monthly reports.

After analysis, this solution will meet all criteria with the least amount of disruption to the organization. The cost of producing the training will be minimal because of the utilization of the in-house training department for development. Likewise, the cost for the briefing center managers to complete the module will be negligible due to the fact that it will take place during the next quarterly meeting on the IBM premises. Likewise, the cost of the MarketBound revisions will be minimal since the in-house IT department will be utilized.

Appendix A

Figure 1: IBM SW EBC Organizational Chart

Please see attachment *Figure1OrgChart.ppt*

Figure 2: The Gaps between the IBM SW EBC Program's Current and Ideal Status

What is currently happening	What should be happening	Gaps between what is currently and should be happening
Data collection methods among all centers lack consistency	All centers' data collection methods are the same	No documented procedures for data collection
Data reporters are unaware of automated reports available in the MarketBound database system	Al centers' data reporters utilize automated reports in the MarketBound database system	No communication method for publicizing automated reports available in the MarketBound database system
No management consensus of correct data collection procedures	A documented procedure for data collection is in place	No documented procedure for data collection is in place
Each center determines its own methods of data collection	A collective decision among briefing centers is made for collecting monthly data	No management consensus of correct data collection procedures
The role of data reporter is assigned to employees without the training to accompany it	The role of data reporter is assigned with proper training to accompany it	No training program is established for the role of data reporter
The EBC program manager does not have a means to check the accuracy of data.	The EBC program manager has a means to check the accuracy of data.	Varied reporting results from inconsistent reporting methods
Data reporters calculate "# of customers" category differently from other data reporters	From the automated MarketBound reports, data reporters calculate the numbers of all non-IBM attendees for the "# of customers" category	No clear instructions for what the "# of customers" category means
Data reporters use different systems to calculate "overall assessment" category differently from other data reporters	From the automated MarketBound reports, data reporters calculate combined IBM and non-IBM scores for the "overall assessment" category	No one clear calculation method exists for what the "overall assessment" category means
Data reporters do not	Data reporters manually	No documented

give correct weight to each evaluation score when calculating "overall assessment" category from the MarketBound reports	average each briefing's evaluations for the month with equal weight	procedures/instructions for data collection
Each center arbitrarily establishes criteria for what constitutes an "other" (non-briefing) event	All centers follow a defined criteria for what constitutes an "other" (non-briefing) event	No established criteria for what constitutes an "other" (non-briefing) event

Figure 3: Probable Causes of Performance Deficits

Lack of Skills/Knowledge	Motivation/Incentive	Working Conditions
No documented procedures for data collection	Data collection methods among all centers lack consistency	No management consensus of correct data collection procedures
No communication method for publicizing automated reports available in the MarketBound database system	Each center determines its own methods of data collection	No management consensus for established criteria for what constitutes an "other" (non-briefing) event
No management consensus of correct data collection procedures	The EBC program manager does not have confidence in the accuracy of the monthly reported data	The role of data reporter is assigned to employees without the training to accompany it
No training program is established for the role of data reporter	The role of data reporter is assigned to employees without the training to accompany it	
Varied reporting results from inconsistent reporting methods	Data reporters calculate "# of customers" category differently from other data reporters	
No clear instructions for what the "# of customers" category means	Data reporters calculate "overall assessment" category differently from other data reporters	
No clear instructions for what the "overall assessment" category means	Data reporters do not give correct weight to each evaluation score when calculating "overall assessment" category from the MarketBound reports	
No central method for logging and reporting "other" (non-briefing) events	Data reporters calculate "other" (non-briefing) events differently from other data reporters	

Figure 4: Possible Solutions for Performance Deficits

Possible Solutions	Time	Environmental Consideration	Organizational Change	Space Equipment Requirements	Cost	Benefit & Loss Individuals	Benefit & Loss Organization
Instructor-led training via teleconference	O	-	O	+	O	-	+
Instructor-led training via classroom	O	+	+	+	+	+	+
Responsibility for data reporting goes to one person who represents all centers	O	+	O	+	+	O	+
Revise automated reports within MarketBound database system to be more report friendly	+	+	+	+	+	+	+

Key:
+ = uses less time and resources
- = uses more time and resources
O = uses about the same amount of time and resources

Figure 5: IBM Software Executive Briefing Center Monthly Report

Please see attachment *Figure5MonthlyReport.ppt*