The Kepner-Tregoe Approach

Kepner-Tregoe’s Problem Solving & Decision Making is the foundation on which the company works with clients worldwide. It is the critical ingredient to improving organizational results. These breakthrough concepts were developed after years of extensive research by Drs. Charles H. Kepner and Benjamin B. Tregoe. The Problem Solving & Decision Making method is a deliberate, step-by-step process that organizes information, judgment and experience to solve complex problems and make prudent decisions. It incorporates current advances in learning technology and responds to meet changes in management needs.

Although the core processes remain intact, video cases, accelerated learning concepts and more emphasis on questioning techniques and interpersonal use make the concepts even more applicable in today’s business environment.

With nearly 50 years of experience with commerce, industry and government worldwide, Kepner-Tregoe (KT) has developed a unique methodology and philosophy for working with clients. It matches course materials and content with up-to-date management trends and organizational goals.

This comprehensive method to improving performance comprises four distinct phases:

**Preparation:** Careful structuring of the program through the development of clear, visible objectives and top management commitment

**Installation:** Selection and development of internal consultants and trainers; customization of the workshop based on client objectives; planning and delivery of training

**Application:** Appropriate modification of the organization’s procedures, as well as measurement of results and consulting support

**Maintenance:** Commitment to our clients of ongoing service to ensure achievement of objectives and long-term results
The fundamental processes learned in the workshop are:

**Situation Appraisal:**
Teaches participants to look at the whole picture by identifying and evaluating overall concerns. The concerns are broken into manageable issues and prioritized. A plan is developed for the effective resolution of the issues including what analysis is required and who needs to be involved.

**Problem Analysis:**
Teaches participants to resolve problems by first defining the problem in detail. Possible causes are identified and then tested against the “problem definition.” Participants verify the true cause of a problem before taking expensive corrective action.

**Decision Analysis:**
Teaches a decision-making procedure that is applicable when the choice between alternatives is unclear. Participants learn to clarify the purpose of the decision and form clear objectives. In addition, they evaluate possible courses of action and assess related risks prior to making a decision. This process becomes a powerful common language for promoting effective decision making throughout an organization.

**Potential Problem Analysis and Potential Opportunity Analysis:**
Teaches participants to anticipate potential problems and opportunities and their likely causes. Participants develop preventive or promoting actions to protect or enhance a plan, and implement the appropriate contingent or exploiting actions, if required.
LEARNING OBJECTIVES
Completion of the KT Problem Solving & Decision Making workshop enables participants to:

• Understand the basic steps of Situation Appraisal, Problem Analysis, Decision Analysis, Potential Problem Analysis, and Potential Opportunity Analysis
• Question incisively and listen intently to access relevant information
• Interact more effectively as a team through use of a common approach and language
• Recognize when participation from others is needed to create commitment or enhance the quality of a solution
• Understand techniques for managing conflict and reaching group consensus
• Apply the concepts to work-related concerns in order to achieve organizational results

LEARNING DESIGN
KT has refined its proprietary instructional design through years of experience and now has taken advantage of client suggestions and improved learning techniques. The program:

• Provides a stimulating environment based on adult learning principles to maximize skill transfer
• Uses competency-based instruction, with video and paper-based case practice and on-the-job application, and encourages participant self-evaluation and workshop leader assessment of learning
• Dedicates over 60 percent of the workshop to case practice and on-the-job application
• Provides instructor presentations and video segments that offer valuable information and models of desired behavior for learners to discuss and emulate
• Is approved by the American Council on Education for upper-level college credit, is recommended by the Project Management Institute for professional development units, and is government accredited as “Nationally Recognised Training” in Australia.

Workshop Flexibility
The workshop can be customized to meet the needs of different management and executive levels, as well as professional and staff specialists and key support personnel through variations in the program structure and content, including:

• The number and content of the case studies used and the emphasis on team or individual on-the-job application
• The sequence in which the learning modules are presented and the depth to which each process is covered
• The use of structured application sessions, covering optional topics such as: influencing others, making recommendations and objectively handling people problems
• Duration of almost any length, including a three-day workshop (page 6) and a comprehensive, five-day workshop (page 7)
Day One

Focus on Situation Appraisal and Problem Analysis

The workshop opens with a quick overview of objectives, participant introductions and workshop administration. Through the use of a video-based, group exercise, participants identify their current questioning skills and methods for handling complex situations. The basics of Situation Appraisal (SA) are introduced as a systematic process to gather, sort and organize information. As a demonstration of the benefits, a video presents a complicated and emotional situation that is rationally separated into actionable concerns.

After the brief review of Situation Appraisal, another video-based demonstration introduces Problem Analysis (PA). Participants use the video to explore their own approaches to finding cause and then a two-part, video-based, small group case outlines the concepts involved in Problem Analysis. The day closes with an application of the principles to work-related problems.

Day Two

Focus on Problem Analysis

Participants review and discuss learning points from the first day. A two-part case study is used for additional practice of the problem-solving techniques, and participants develop skills for asking and answering incisive questions. Effective questioning techniques are demonstrated in a video as a critical part of effective problem solving. During the second part of the case, participants learn to use the distinctions and changes of a problem to develop possible causes.

Additional case studies focus on a practice of effective questioning techniques. Each participant attempts to gather relevant information from another in order to define a problem and generate causes. Full group practice of questioning skills is also an option.

During the final portion of the day, discussions of on-the-job application are structured to meet specific needs of individual participants and the group.
**Optional Modules**

Optional modules, designed to meet additional client needs, include the following:

- **The Creativity Module** emphasizes the need for original ways to approach difficult challenges. It presents creative thinking techniques and applies them within the KT Problem Solving & Decision Making framework.
- **Statistical Problem Solving** integrates the KT Problem Solving & Decision Making process with the organization’s approach to statistical process control.

### Day Three

**Focus on Decision Analysis, along with presenting and assessing recommendations**

Participants review and discuss learning points from the first two days. The basics of Decision Analysis (DA) are then presented and participants apply the step-by-step methodology during a two-part video simulation. The skills are then applied to work-related concerns and participants receive feedback and additional insights from the instructor.

Decision Analysis refinements are presented to prepare participants for application of the concepts in specific settings. Additional time is provided for full-group Decision Analysis application.

The day concludes with an instructor teach and exercise on presenting and assessing recommendations using the Decision Analysis concepts. A video segment illustrates the benefits of effectively presenting and assessing recommendations with the Decision Analysis format and participants discuss the importance of consensus—when it’s appropriate and how to manage a consensus-seeking meeting.

### Day Four

**Focus on Potential Problem Analysis, Potential Opportunity Analysis, questioning and listening skills, Situation Appraisal and transferring the skills to the job**

Participants quickly review and discuss learning points from the first three days and begin work on Potential Problem and Opportunity Analysis (PPA/POA). Potential Problem Analysis offers participants a method for protecting their decisions and actions, while Potential Opportunity Analysis uses similar methods to capitalize on future situations.

Participants discuss the potential pitfalls and benefits of implementing a recommendation to practice Potential Problem/Opportunity Analysis. Potential Problem/Opportunity Analysis are applied to actual job-related concerns. Coaching and feedback is provided by the instructor. Next, a video engages participants with a demonstration of the use of Potential Problem Analysis under time pressure. Participants utilize listening techniques to spot vague or missing information.

Situation Appraisal is reviewed and refinements are presented. An instructor-led exercise allows participants to practice separating and clarifying vague concerns. Situation Appraisal is then applied to individual job-related concerns. An instructor-led discussion focuses on using the process to achieve results and participants plan for the ongoing use of each process.
Problem Solving & Decision Making
Three-Day Workshop

DAY ONE
Focus on Situation Appraisal and Problem Analysis

Opening Briefing
Questioning Discovery
Process Overview
SA Teach
PA Introduction
PA Discovery
PA Demo
PA State & Specify Teach
PA Basics Practice (Specification)
PA Evaluate & Confirm Teach
PA Basics Practice (Finish Spec & Test)
PA Application (Spec & Test)
Review & Opportunity

DAY TWO
Focus on Problem Analysis and Decision Analysis

Review Day 1
Questioning Skills Teach
Distinctions & Changes Practice (Specification)
Distinctions & Changes Teach
Distinctions & Changes Practice (Evaluate & Confirm)
DA Clarify Purpose Teach
DA Practice (Objectives)
DA Practice (Alternatives & Risks)
DA Application (Choose in Group)
DA Application (Choose in Group)
Review & Opportunity

DAY THREE
Focus on Potential Problem Analysis and Potential Opportunity Analysis, questioning and listening skills, Situation Appraisal and transferring the skills to the job

Review Day 2
PPA/POA Basics Teach
PPA/POA Practice
PPA or POA Application (Single Action)
PPA Techniques Teach
PPA or POA Application (Techniques)
Listening Teach
Questioning & Listening Exercise
SA Review & Teach
SA Exercise
SA Application
Final Planning
Summary & Evaluation

THREE-DAY WORKSHOP APPROXIMATE TIME ALLOCATION (HOURS):

Presentation 10.75  Case Practice 7.75  Application 5.50
Problem Solving & Decision Making
Five-Day Workshop

**DAY ONE**
Focus on Situation Appraisal and Problem Analysis

- Opening Briefing
- Questioning Discovery
- Process Overview
- SA Teach
- PA Introduction
- PA Discovery
- PA Demo
- PA State & Specify Teach
- PA Basics Practice (Specification)
- PA Evaluation & Confirm Teach
- PA Basics Practice (Finish Spec & Test)
- PA Application (Spec & Test)
- PA Questioning Practice or Group Questioning Practice
- Review & Opportunity

**DAY TWO**
Focus on questioning skills and Problem Analysis

- Review Day 1
  - Questioning Skills Teach
  - Distinctions & Changes Practice (Specification)
  - Distinctions & Changes Teach
  - Distinctions & Changes Practice (Evaluate & Confirm)
  - PA Questioning Practice
  - PA Application (Full Process)
- Review & Opportunity

- Distinctions and Changes Skills

**DAY THREE**
Focus on Problem Analysis and Decision Analysis

- Review Day 2
  - PA Techniques Teach
  - PA Techniques Application
  - DA Clarify Purpose Teach
  - DA Practice (Objectives)
  - DA Evaluate & Choose Teach
  - DA Practice (Alternatives & Risks)
  - DA Application (Choose Alone)
- Review & Opportunity

**DAY FOUR**
Focus on Decision Analysis, Potential Problem Analysis and Potential Opportunity Analysis

- Review Day 3
  - DA Techniques Teach
  - DA Application (Choose in Group)
  - Present & Assess Recommendations Teach
  - PPA Basics Teach
  - POA Basics Teach
  - PPA and POA Practice
  - PPA and POA Application (Single Action)
  - PPA Techniques Teach
  - PPA and POA Application (Techniques)
- Review & Opportunity

**DAY FIVE**
Focus on Situation Appraisal, questioning and listening skills and transferring the skills to the job

- Review Day 4
  - Listening Teach
  - Questioning & Listening Exercise
  - SA Review & Teach
  - SA Exercise
  - SA Application
  - Daily Activity Planning
  - Final Planning
- Summary & Evaluation

**FIVE-DAY WORKSHOP APPROXIMATE TIME ALLOCATION (HOURS):**
- Presentation 15.25
- Case Practice 9.75
- Application 15.00
About Kepner-Tregoe

Kepner-Tregoe (KT) provides consulting and training services to organizations throughout the world. We build competitive advantage using powerful, systematic processes for resolving business issues and achieving targeted performance improvements.

Since 1958, KT has studied how effective business leaders manage difficult business challenges. We incorporated their habits into logical, repeatable methods for rapidly resolving problems, making decisions, planning ahead, and managing people and projects. This world-renowned, rational-process approach helps maximize the critical thinking skills, knowledge, and expertise of individuals and organizations.

KT collaborates with many of the largest and most successful companies in the world to improve the way work is done and facilitate new approaches to quality, competitiveness, cost, cycle time, business strategy, and other issues. Many organizations integrate our systematic methods into their business processes, embedding a common language approach for identifying objectives, resolving issues, and integrating change.

At a time when organizations face multiple challenges—intense global competition, crushing growth and cost pressures, rapid technological advances—KT plays a vital role in helping them improve the clarity of their strategic thinking and the effectiveness of their operations.

Kepner-Tregoe Locations

Headquarters
United States
Australia
Canada
France
(serving Spain)
Germany
Hong Kong
Ireland
Japan
Malaysia
Netherlands
Singapore
Switzerland
(serving Belgium)
Taiwan
Thailand
United Kingdom

Also serving:
Africa, China, India, and throughout Europe and Southeast Asia

Affiliates
Brazil
Chile (serving Argentina)
Finland
Italy
Korea
Mexico (serving Costa Rica, El Salvador, Guatemala, Honduras, Nicaragua, and Panama)
Peru (serving Colombia)
Philippines
Poland
Romania
Venezuela

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