

Open Issues Management Template

Company: _____ Date: _____

WHAT IS THE OPEN ISSUES LIST?

The open issues list is a living document where you capture all obstacles, problems, opportunities, and ideas. In your Weekly Leadership Meeting, you'll prioritize and solve the top 3 issues each week using a structured problem-solving process.

An "Issue" can be:

- A problem to solve
- An obstacle to remove
- An opportunity to explore
- An idea to discuss
- A decision to make

MASTER OPEN ISSUES LIST

#	Issue	Source	Owner	Priority	Date Added	Status
1		Scorecard / Quarterly Priorities / Status Update / Other				Open / In Progress / Solved
2		Scorecard / Quarterly Priorities / Status Update / Other				Open / In Progress / Solved

#	Issue	Source	Owner	Priority	Date Added	Status
3		Scorecard / Quarterly Priorities / Status Update / Other				Open / In Progress / Solved
4		Scorecard / Quarterly Priorities / Status Update / Other				Open / In Progress / Solved
5		Scorecard / Quarterly Priorities / Status Update / Other				Open / In Progress / Solved
6		Scorecard / Quarterly Priorities / Status Update / Other				Open / In Progress / Solved
7		Scorecard / Quarterly Priorities / Status Update / Other				Open / In Progress / Solved
8		Scorecard / Quarterly Priorities / Status Update / Other				Open / In Progress / Solved
9		Scorecard / Quarterly Priorities / Status Update / Other				Open / In Progress / Solved
10		Scorecard / Quarterly Priorities / Status Update / Other				Open / In Progress / Solved

#	Issue	Source	Owner	Priority	Date Added	Status
11		Scorecard / Quarterly Priorities / Status Update / Other		  		Open / In Progress / Solved
12		Scorecard / Quarterly Priorities / Status Update / Other		  		Open / In Progress / Solved
13		Scorecard / Quarterly Priorities / Status Update / Other		  		Open / In Progress / Solved
14		Scorecard / Quarterly Priorities / Status Update / Other		  		Open / In Progress / Solved
15		Scorecard / Quarterly Priorities / Status Update / Other		  		Open / In Progress / Solved

Priority:

-  **HIGH** - Urgent, blocking progress, high impact
-  **MEDIUM** - Important but not urgent
-  **LOW** - Nice to solve, low impact

ISSUE RESOLUTION PROCESS (IDENTIFY, DISCUSS, SOLVE)

Use this framework to solve each issue in your Weekly Leadership Meeting.

ISSUE #1: _____

Date: _____ **Time Allocated:** 20 minutes

I = IDENTIFY

What is the REAL issue?

(Keep asking "What's the real issue?" until you get to the root cause, not symptoms)

How do we know this is the real issue?

D = DISCUSS

Get all perspectives on the table:

Person 1 Perspective:

Person 2 Perspective:

Person 3 Perspective:

Key Facts & Data:

Root Cause Analysis (5 Whys):

1. Why?
2. Why?
3. Why?
4. Why?
5. Why?

True Root Cause:

S = SOLVE

Proposed Solutions (Brainstorm 3-5 options):

1.
2.
3.
4.
5.

Chosen Solution:

Why we chose this solution:

Action Items:

Action Item	Owner	Due Date	Success Metric

Follow-up Plan:

Issue Status:  SOLVED |  NEEDS MORE WORK |  PARK FOR LATER

ISSUE #2: _____

Date: _____ Time Allocated: 20 minutes

I = IDENTIFY

D = DISCUSS

S = SOLVE

Solution:

Action Items:

- ☐ _____ | Owner: _____ | Due: _____
- ☐ _____ | Owner: _____ | Due: _____

Status:  SOLVED |  NEEDS MORE WORK |  17 PARK FOR LATER

ISSUE #3: _____

Date: _____ **Time Allocated:** 20 minutes

I = IDENTIFY

D = DISCUSS

S = SOLVE

Solution:

Action Items:

- ☐ _____ | Owner: _____ | Due: _____
- ☐ _____ | Owner: _____ | Due: _____

Status:  SOLVED |  NEEDS MORE WORK |  17 PARK FOR LATER



ISSUES TRACKING DASHBOARD

This Quarter Summary

Metric	Count
Total Issues Added	
Issues Solved	
Issues In Progress	
Issues Parked	
Average Time to Solve	___ days
Solve Rate	___%

Target Solve Rate: 80%+

Issues by Category

Category	Count	% of Total
People		
Process		
Customer		
Financial		
Strategic		
Other		

Insight: If one category dominates, you may have a systemic problem.

Chronic Issues (Recurring Problems)

Issues that keep coming back:

Issue	Times Appeared	Root Cause	Permanent Solution Needed

These should become Quarterly Goals or Process improvements!

OPEN ISSUES BEST PRACTICES

Adding Issues

 DO:

- Add issues as soon as they come up
- Be specific when stating the issue
- Capture from Scorecard, Quarterly Priorities, status updates, and team input
- One person owns each issue
- Keep the list visible and accessible

DON'T:

- Let issues pile up unaddressed
 - Make issues too vague ("Sales is bad")
 - Assign to multiple people
 - Add to-dos as issues (those go on To-Do list)
 - Ignore patterns of recurring issues
-

Prioritizing Issues

In your Weekly Leadership Meeting (5 minutes before Issue Resolution):

1. Review the full open issues list
 2. Ask: "What are the top 3 issues we need to solve TODAY?"
 3. Consider:
 - Urgency (what's blocking us now?)
 - Impact (what will move the needle most?)
 - Dependencies (what's blocking other things?)
 4. Move top 3 to Issue Resolution time
 5. Park the rest for future meetings
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Running Issue Resolution Effectively

DO:

- Spend 60 minutes on Issue Resolution in your Weekly Leadership Meeting

- Stay disciplined with the Issue Resolution process
- Get to root cause (keep asking "why?")
- Solve to completion (clear action items)
- Move quickly (20 mins max per issue)
- Have open, honest discussion
- Make decisions (don't just talk)

✗ **DON'T:**

- Skip Issue Resolution to "save time"
 - Solve symptoms instead of root causes
 - Let discussion go in circles
 - Leave without clear action items
 - Blame people (focus on solving)
 - Revisit decisions already made
 - Take more than 20 mins per issue
-

ROOT CAUSE ANALYSIS TOOLS

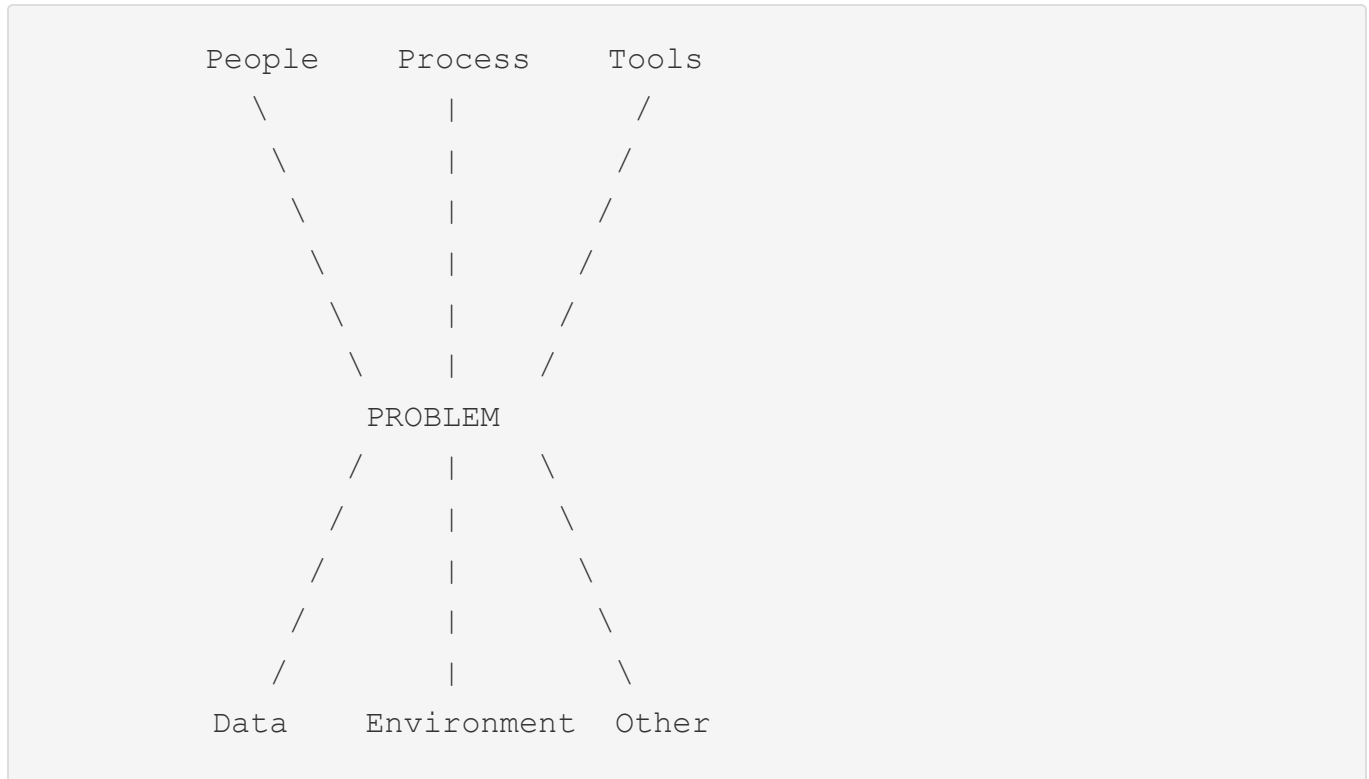
The 5 Whys

Keep asking "Why?" until you find the real issue.

Example:

- **Issue:** Revenue is down
 - Why? Fewer new customers
 - Why? Lower close rate
 - Why? Longer sales cycle
 - Why? Leads are lower quality
 - Why? **Root Cause:** Marketing targeting is off
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Fishbone Diagram (Cause & Effect)



COMMON ISSUES BY TYPE

People Issues

- Wrong person in seat
- Lack of accountability
- Poor communication
- Skills gap
- Culture fit problems

Solution: Use Team & Role Fit Assessment, clarify accountability

Process Issues

- Lack of documented process

- Process not being followed
- Inefficient workflow
- Bottlenecks
- Quality problems

Solution: Document process, train team, use tools

Customer Issues

- Churn increasing
- Complaints rising
- Low satisfaction
- Long sales cycles
- Poor retention

Solution: Talk to customers, improve product/service

Strategic Issues

- Unclear direction
- Misaligned priorities
- Lack of differentiation
- Market changes
- Competitive threats

Solution: Revisit Strategic Plan, clarify strategy

ISSUE RESOLUTION CHECKLIST

Before marking an issue as "Solved," ensure:

- ☐ Root cause was identified (not just symptoms)

- ☐ All perspectives were heard
- ☐ Multiple solutions were considered
- ☐ Best solution was chosen with clear rationale
- ☐ Clear action items with owners and due dates
- ☐ Follow-up plan is in place
- ☐ Team is aligned on the solution
- ☐ Documentation updated if needed



MEASURING ISSUE-SOLVING EFFECTIVENESS

Track these monthly:

Metric	This Month	Last Month	Target
Issues Added			
Issues Solved			
Solve Rate %			80%+
Avg Days to Solve			<30
Recurring Issues			<10%

Trend: Improving | Steady | Declining

Manage all your issues in GoalCadence with automatic tracking and Issue Resolution templates. Try free!



Download: [Microsoft Word \(.docx\)](#)

 **More templates:** goalcadence.com/resources