

Stage I: Design of the proposal

In no more than two sentences, what is your idea?

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How can you minimize resistance to this idea?

2	<p>Relate it to something that has been done (or at least heard of) before in the organization?</p> <p>Go for a smaller change which addresses most of the issue, rather than a large, traumatic one?</p> <p>Make it a trial basis or in some way limit commitment?</p> <p>Choose an optimum time to present the idea?</p> <p>Remember to allow for discussion so it doesn't seem like an ultimatum.</p>
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What format and level of formality is needed?

3	Written, oral, other? Formal report, casual conversation or in-between?
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Define the audience which will consider the idea:

4	<p>Who is it? How much do they know?</p> <p>The audience is: " Expert " Technician " Executive " Layman " Mixed or unknown</p>
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How well developed must the proposal be?

5	<p>Enough to get the idea accepted, or very complete? Does it need to be divided into planning then implementation? What quality issues apply in this case?</p>
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How can you enhance the proposal's credibility?

6	<p>What in your record (or your team's) can you cite? How can you make it more believable? What politics may be going on regarding this issue? What else can help the audience agree with it?</p>
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Who needs to be "Pre-sold" about this proposal?

7	<p>Who is affected by it? Who will decide? Who will evaluate? Who will support? Who will oppose?</p>
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Stage II: Contents of the proposal

Again: Why is the change needed?

8	Write your opening sentence about why this is a good idea.
	What specific support do you have for the idea in terms of underutilized resources, excessive costs, poor allocation of people or equipment, customer complaints, employee dissatisfaction, awkward procedures, new market opportunities, issues with facilities, etc. Cite specific numbers and costs. If you don't know them now, where can you find them before you finalize the proposal?

What background is needed for the audience?

9	What change (if any) happened to cause this problem or opportunity?
	What are the consequences of not dealing with the proposal being made?



What are the benefits of this idea?

10	List the expected benefits, quantifying them when possible.
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What are the specifics: What, who, when, where?

11	Specifically, what are you asking the decision maker to agree to at this time?
	Who else will be involved or affected?
	What other offices, locations, departments, etc., be involved or affected?
	When should this change happen?



As much as possible prior to approval, what is the general implementation plan and actions needed?

12	Include the schedule, list of tasks, methods, facilities involved, and so on.
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What support exists indicating this is a good idea?

13	Personal experience? Other people who agree so far? Books or articles? Other places it has worked?
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14	List any significant issues that might arise, then how you would deal with them or the consequences.
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15	What is the budget (by category if necessary), who will pay for it?
	What is the expected ROI (return on investment) or cost-benefit ratio?



Write your summary of the proposal here

16	Two or three sentences should be enough, or use a few key "bullet points"
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What materials do you need in the appendix?

17	Charts, surveys, computations, input data, articles, lists of personnel, references, citations, etc.
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What will you do when you get the decision?

18	If the answer is "Yes"	If the answer is "No"	If changes are suggested
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