

Proposal Worksheet

Stage I: Design of the proposal

In no more than two sentences, what is your idea for a training program?

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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? Go for a smaller effort which addresses most of the issue, rather than a large, traumatic one? Make it a trial basis or in some way limit commitment? Choose an optimum time to present the idea? Remember to allow for discussion so it doesn't seem like an ultimatum.</p>
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Who needs to be "Pre-sold" about this proposal?

7	Who is affected by it? Who will decide? Who will evaluate? Who will support? Who will oppose?
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Stage II: Contents of the training proposal

Again: Why is the training 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 requiring training?
	What are the consequences of not dealing with the proposal being made?

What are the benefits of this training?

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 training 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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Is there a possible downside to the training?

14	List any significant issues that might arise, then how you would deal with them or the consequences.
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What will the training cost to implement?

15	What is the budget (by category if necessary), who will pay for it?
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	What is the expected ROI (return on investment) or cost-benefit ratio?
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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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Notes:

By the way, you can use this process for any kind of proposal, not just training proposals.
For more suggestions, see chapter 4 of *The Professional Trainer* © 2005