

# Chapter 7: Proposing Changes

## Key points of chapter

This chapter is adapted from *The Professional Trainer*, which was also written by the author. We start with why a proposal of any kind is often necessary. Proposals might be formal or informal, written or oral, and may be made in any number of formats. Hopefully, the ideas in the chapter will help you in almost any situation where a proposal is needed.

There are several suggestions of ways to make a proposal more palatable, and four overall guidelines. The remainder of the chapter lists and explains (in order) fourteen categories which might be appropriate to be included in a proposal.

## Answers to Study Questions

1. If you can, try making it smaller or less expensive to adopt. Can it be done as a trial program instead of a long term commitment? If it's so radical that it will be rejected as soon as it's mentioned, then build up to it instead of starting with an explanation. First tell why it's a good idea (saves money, etc.), then follow other suggestions in the book.
2. It takes too long, it will be wasted effort if not adopted, it may require changes, you may not have all the information you need.
3. For the expert: Stick to facts and cite the sources. Use a high level of logic. Do your homework so you're sure of your presentation. Make sure to establish your credibility in a way that will be meaningful to the audience. For the layman: Tell a story; use a simile or metaphor, or cite real situations – including naming people involved, when possible. Don't use unnecessarily "impressive" words or statistics; they tend to overwhelm the layman.
4. Too early discussion of the details doesn't let people focus on the idea as a whole. It can also be tedious and difficult to follow, especially if the listener isn't already hooked in.

## Answers to Exercises

Individual exercise – no common answer exists. Consider using the following printable format to develop your proposal.

## Other Materials

On the pages that follow, you will find:

- Now that you've completed the theory part of the book, a post-test on decision making is provided. (The answers are found in the chapter 8 supplemental file.)
- A worksheet designed to guide you through the proposal development process. These are from a seminar which the author conducts for businesses and groups. You are welcome to copy these for your future use.

# Post Test on Decision Making

Circle either true or false:

- |   |   |  |
|---|---|--|
| T | F | 1. We all make hundreds of decisions every day.  |
| T | F | 2. All decisions are made in an essentially similar pattern.   |
| T | F | 3. The first step in decision making is to determine if one is really needed.  |
| T | F | 4. Deadlines are an influence on a decision's importance.  |
| T | F | 5. Decisions which can be changed later are often less critical.   |
| T | F | 6. Technological capability is an example of a limitation in decision making.  |
| T | F | 7. Most of us are born with more creativity than we use.   |
| T | F | 8. Being stuck in a rut is an example of an emotional block.   |
| T | F | 9. We can improve our creativity with practice.  |
| T | F | 10. Choices should be evaluated as they appear.  |
| T | F | 11. Decision making applies to all phases of management or supervision.  |
| T | F | 12. Checklists and catalogs are idea generating tools.   |
| T | F | 13. Intuition is more important than rational thought in the early stages of decision making.  |
| T | F | 14. Limits should be established early in the decision making process.   |
| T | F | 15. Tolerance for risk influences decision making for managers.  |
| T | F | 16. Listing possible sources of information, then trying to determine which is most important is a simplified form of Pareto Analysis. |
| T | F | 17. A decision matrix can be used to aid almost any decision.  |
| T | F | 18. It is better to present ideas to individuals than to groups.   |
| T | F | 19. Brainstorming can be done by any individual to help make decisions.  |
| T | F | 20. "Framing" the decision properly is helpful, but not essential.   |

## Stage I: Design of the proposal

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

|   |  |
|---|--|
| 1 |  |
|---|--|

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?<br/>Go for a smaller change which addresses most of the issue, rather than a large, traumatic one?<br/>Make it a trial basis or in some way limit commitment?<br/>Choose an optimum time to present the idea?<br/>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? |
|---|---|



## Define the audience which will consider the idea:

|          |   |
|----------|---|
| <b>4</b> | <p>Who is it? How much do they know?</p><br><br><br><br><br><br><br><br><br><br><p>The audience is: " Expert " Technician " Executive " Layman " Mixed or unknown</p> |
|----------|---|

## How well developed must the proposal be?

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

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| <b>6</b> | <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?

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|----------|--|
| <b>7</b> | <p>Who is affected by it? Who will decide? Who will evaluate? Who will support? Who will oppose?</p> |
|----------|--|



## 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?

|           |   |
|-----------|---|
| <b>10</b> | List the expected benefits, quantifying them when possible. |
|-----------|---|

### What are the specifics: What, who, when, where?

|           |  |
|-----------|--|
| <b>11</b> | 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?

|           |   |
|-----------|---|
| <b>12</b> | Include the schedule, list of tasks, methods, facilities involved, and so on. |
|-----------|---|

What support exists indicating this is a good idea?

|           |   |
|-----------|---|
| <b>13</b> | Personal experience?<br>Other people who agree so far?<br>Books or articles?<br>Other places it has worked? |
|-----------|---|



## Is there a possible downside to the proposal?

|           |  |
|-----------|--|
| <b>14</b> | List any significant issues that might arise, then how you would deal with them or the consequences. |
|-----------|--|

## What will the proposal cost to implement?

|           |  |
|-----------|--|
| <b>15</b> | 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" |
|----|---|

## What materials do you need in the appendix?

|    |  |
|----|--|
| 17 | Charts, surveys, computations, input data, articles, lists of personnel, references, citations, etc. |
|----|--|



# What will you do when you get the decision?

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

