

# PROPOSAL PREPARATION CHECKLIST

**A** -- Attended to (yes, OK, answer(s) known, done, etc.)

**N** -- Not attended to (not applicable, not needed, little or no risk, etc.)

## **A    N            CHARTING**

- |                          |                          |   |
|--------------------------|--------------------------|---|
| <input type="checkbox"/> | <input type="checkbox"/> | 1. Chart the proposed process.  |
| <input type="checkbox"/> | <input type="checkbox"/> | 2. On the "As-Is" Chart, highlight (red) symbols to be eliminated.                  |
| <input type="checkbox"/> | <input type="checkbox"/> | 3. On the "As-Is" Chart, highlight (red) symbols to be changed but not eliminated.  |
| <input type="checkbox"/> | <input type="checkbox"/> | 4. On the "To-Be" Chart, highlight (blue) symbols to be changed but not eliminated. |

## **PROPOSAL WRITING**

- |                          |                          |  |
|--------------------------|--------------------------|--|
| <input type="checkbox"/> | <input type="checkbox"/> | 5. List all the differences between the "As-Is" Chart and the "To-Be" Chart as short sentences. (i.e. Deliver receipts directly to accounting. Prepare one copy instead of three. Eliminate the logbook. Etc.) These are your recommendations. |
| <input type="checkbox"/> | <input type="checkbox"/> | 6. Be sure that all recommendations are what the team believes is best for the organization, not what they think management will accept.   |
| <input type="checkbox"/> | <input type="checkbox"/> | 7. Team members must approve recommendations that will affect their work areas or they cannot be proposed.   |
| <input type="checkbox"/> | <input type="checkbox"/> | 8. After discussion, the final wording of each recommendation should be prepared by the team member whose work area is most affected by it.  |
| <input type="checkbox"/> | <input type="checkbox"/> | 9. Note recommendations that are interdependent and must be accepted or rejected as a package.   |
| <input type="checkbox"/> | <input type="checkbox"/> | 10. Include with the recommendations any changes that have already been installed during the study.  |
| <input type="checkbox"/> | <input type="checkbox"/> | 11. Estimate the benefits and costs of each recommendation.. (Use the Checklist for Benefits and Costs.)   |
| <input type="checkbox"/> | <input type="checkbox"/> | 12. Summarize the major benefits.  |
| <input type="checkbox"/> | <input type="checkbox"/> | 13. Write the Proposal – summary should appear first, then the recommendations, each with its benefits and costs.  |
| <input type="checkbox"/> | <input type="checkbox"/> | 14. List the recommendations in process sequence except where there is a particularly emotional or political recommendation which would be better listed last.   |

## **DISTRIBUTION**

- |                          |                          |   |
|--------------------------|--------------------------|---|
| <input type="checkbox"/> | <input type="checkbox"/> | 15. Do not distribute the written proposal before the proposal meeting. |
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