

PROPOSAL PRESENTATION 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 PREPARATION

- | | | |
|--------------------------|--------------------------|---|
| <input type="checkbox"/> | <input type="checkbox"/> | 1. Is the proposal written? |
| <input type="checkbox"/> | <input type="checkbox"/> | 2. Assign presentations to team members. (Summary – to the Team Leader, each recommendation to the team member from the area most affected by it.) |
| <input type="checkbox"/> | <input type="checkbox"/> | 3. Insist that team members present their parts. This is important – clearly indicating the support of a person who can make it happen. |
| <input type="checkbox"/> | <input type="checkbox"/> | 4. Rehearse and time the reading. |
| <input type="checkbox"/> | <input type="checkbox"/> | 5. Plan that each presenter will stand up. If too nervous have them speak seated. |
| <input type="checkbox"/> | <input type="checkbox"/> | 6. Present only what you believe is best for the organization and try to convey your belief through expression and tone of voice. (Don't act as though you don't care.) |

FACILITIES

- | | | |
|--------------------------|--------------------------|--|
| <input type="checkbox"/> | <input type="checkbox"/> | 7. Make sure a room is scheduled. |
| <input type="checkbox"/> | <input type="checkbox"/> | 8. Make sure the room is clean. |
| <input type="checkbox"/> | <input type="checkbox"/> | 9. If you are going to use audio visual or projection equipment make sure it is set up in advance and working. |
| <input type="checkbox"/> | <input type="checkbox"/> | 10. Make sure the necessary seating is there and do not have extra chairs. (This way you control the seating.) |
| <input type="checkbox"/> | <input type="checkbox"/> | 11. Arrange the seating around one table. |
| <input type="checkbox"/> | <input type="checkbox"/> | 12. The team arrives early and takes seats spread out around the table in order to mix the team with the managers. |

PREPARATORY MEETING WITH SENIOR MANAGER

- | | | |
|--------------------------|--------------------------|--|
| <input type="checkbox"/> | <input type="checkbox"/> | 13. Meet ahead of time with the manager whose authority spans the full project. |
| <input type="checkbox"/> | <input type="checkbox"/> | 14. Get agreement that this manager will co-chair the meeting. |
| <input type="checkbox"/> | <input type="checkbox"/> | 15. Review the agenda, Opening – by senior manger, Reading – by team, Discussion – open, Review of each recommendation for approval – led by senior manager. |
| <input type="checkbox"/> | <input type="checkbox"/> | 16. During opening remarks the senior manager will request no discussion until the proposal reading is complete, and will tell the group how long the reading will take. |
| <input type="checkbox"/> | <input type="checkbox"/> | 17. This preparatory meeting is necessary to assure that the ownership of the project will be properly transferred to the managers to achieve decisions. |

PRESENTATION

- | | | |
|--------------------------|--------------------------|---|
| <input type="checkbox"/> | <input type="checkbox"/> | 18. Distribute the written proposal at the last minute. |
| <input type="checkbox"/> | <input type="checkbox"/> | 19. Senior manager opens the meeting and reviews the agenda. |
| <input type="checkbox"/> | <input type="checkbox"/> | 20. Team reads the proposal, starting with the summary by the team leader, “the bottom line”. |
| <input type="checkbox"/> | <input type="checkbox"/> | 21. Open for questions and discussion. |

WRAP-UP

- | | | |
|--------------------------|--------------------------|---|
| <input type="checkbox"/> | <input type="checkbox"/> | 22. When the discussion winds down, or there are only a few minutes left, the senior manager begins a review of the individual recommendations. |
| <input type="checkbox"/> | <input type="checkbox"/> | 23. Each recommendation is either accepted, rejected or assigned to a manager for decision with a time limit of one week. |
| <input type="checkbox"/> | <input type="checkbox"/> | 24. Double-check the list so that all agree on the decision for each recommendation. |
| <input type="checkbox"/> | <input type="checkbox"/> | 25. Arrange meetings to make final decisions on recommendations that were assigned. |

For understanding business processes: Graham Process Mapping Software at www.processchart.com

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