

20 WINNING PROPOSALS

Description

In this unit, there are two tools and a worked example:

Tool 20A Training proposal checklist: a checklist of what to include in each section of a training proposal

Tool 20B High-level training proposal: a proforma of how to structure a training proposal

Tool 20C High-level training proposal – example.

Purpose

These tools are designed to help you develop targeted training proposals that address the principal concerns of the organisation or department. Influential trainers build credibility by writing proposals that address the big picture.

When to use the tools

After preliminary discussions with your customer, use Tools 20A and 20B to develop and cost your training proposal. Send it to the customer as a working document at least three or four days before you are due to meet again to give the customer time to study the contents.

FOR PREVIEW ONLY

Background

The training proposal is the main instrument through which trainers and consultants are introduced to potential customers and, as such, is seen as a very important document. The proposal sets out a definition of the problem, situation or need as defined by the client, identifies a suggested approach to be undertaken by the trainer or training team, and provides at least a basic project timetable and fee outline. The proposal becomes the basic discussion document for the customer and trainer to define and plan the project. The proposal is then refined as agreements are reached, and becomes a working document for both parties.

Internal trainers and consultants may see the training proposal as less important, or even not required at all, as they do not need to prove themselves in this way. However, I suggest that it is a mistake to treat internal clients with less consideration by assuming that they do not wish to contract your services in this way. Your internal customers may also be using external suppliers and resources, and they may well be judging you against the standards for your entire industry, rather than just what is custom and practice in-house (see *Unit 9 Marketing your services*).

Tools 20A and 20B contain a proven structure for high-level training proposals. Tool 20A will help you ensure that all key information is included. You should use it when developing the content of your training proposals. Tool 20B will help you structure your training proposals. The training proposal format can be used for all types of intervention. The content will, of course, change but the basic structure is very adaptable.

How to use the tools

Tool 20A Training proposal checklist

Tool 20A is a proforma and a valued example of what to include in each section of a training proposal. The format is five charts, one for each of the following areas:

- title and overview
- introduction
- project definition and programme objectives

- about us
- contract details.

Each chart has a number of sub-sections. Each sub-section has a title, plus accompanying notes about what to include, plus a tick box. When you have included the appropriate information in your proposal, tick the box. Tick all boxes to complete the checklist.

Tool 20B High-level training proposal

Tool 20B is a proforma of how to structure a training proposal. The format is a document divided into the following sections:

- title and overview
- introduction
- project definition and programme objectives
- about us
- contract details.

Each section has a number of sub-sections. Use the titles of these sub-sections as prompts when entering the relevant information or statements.

Tool 20C High-level training proposal – example

Tool 20C is a worked example of Tool 20B.



Training proposal checklist

Name: _____

Date: _____

Tick when all complete

TITLE AND OVERVIEW		TICK WHEN DONE
Subject	State what the project or intervention is about.	<input type="checkbox"/>
Written by	Your name and job title, or the capacity in which you are writing the proposal.	<input type="checkbox"/>
Commissioned by	The person who asked you to prepare the proposal or the person it has to be presented to. May be the same person.	<input type="checkbox"/>
Date	Date of the proposal. Can be the specific date or the month. It is useful if there is a long delay, to explain why your original timetable cannot be used.	<input type="checkbox"/>

FOR PREVIEW ONLY

Continued . . .





Training proposal checklist

... continued

INTRODUCTION		TICK WHEN DONE
Organisation and context	A concise overview of the contracting organisation, department, team or individual, as appropriate.	<input type="checkbox"/>
Situation	The context for the intervention. What has happened or is about to happen?	<input type="checkbox"/>
Requirements	What they want you to do and why?	<input type="checkbox"/>
Areas to address	Your concise overview of the requirements as you see them. What is it you are going to deliver?	<input type="checkbox"/>
Next steps	Mention any conversations or input you have had with the customer. Direct attention to coming proposal.	<input type="checkbox"/>

FOR PREVIEW ONLY

continued ...





Training proposal checklist

... continued

PROJECT DEFINITION AND PROGRAMME OBJECTIVES	
<i>TICK WHEN DONE</i>	
Overall aim	What is the purpose of the project? Enter here. <input type="checkbox"/>
Initial objectives	Enter specific business-focused objectives that meet the business needs identified. Don't talk about what the training is about or when it will be delivered. Talk about what the organisation will get as a result of the intervention. <input type="checkbox"/>
Suggested approach	How you intend to deliver the objectives in a logical order. This is the place to talk about what training and when (if relevant). <input type="checkbox"/>
Potential deliverables and milestones	Specific tangible things as evidence of progressor results, and the dates they will be available. In other words, the customer should be able to see it, touch it, hear it, and so on. <input type="checkbox"/>
Scope	What is and what is not included. Be specific as it avoids conflict later. <input type="checkbox"/>
Constraints	You can either specify constraints you have identified, or a preferable approach may be to state what you need and then ask if they have a problem with it. If no problems are raised, then you build what you need into the contract as part of their commitments. <input type="checkbox"/>

continued...





Training proposal checklist

... continued

ABOUT US	<i>TICK WHEN DONE</i>
Department/ service CV	This is about you and your team. Who are you? What is your interest in this customer? Why should you be considered? <input type="checkbox"/>
Specialist areas	What are you and your team known for? Why? Does it relate to the proposal subject? If not, why are you submitting a proposal? <input type="checkbox"/>
Case studies	Some examples of results that show you and your team to be successful. Include at least one relating to the proposal topic. Between two and four are acceptable. <input type="checkbox"/>
Specific trainer CV	How will you be carrying out the training? Give names and a concise account of experience in relation to the specific intervention. <input type="checkbox"/>

FOR PREVIEW ONLY

continued ...





Training proposal checklist

... continued

CONTRACT DETAILS	TICK WHEN DONE
Timetable	What's going to happen and when? To make it easier for the client, do it by month at first. Don't forget to add project meetings and the evaluation activity. Be specific, as any delay by the customer will mean you need to change all the dates. <input type="checkbox"/>
Project fees	State the fee basis – how much per day, what's included and what isn't included. Then provide the fees with simple calculations for each stage of the intervention or specific activity. Then give a total. If the programme is an event for several people, show the overall cost per person and as a percentage of the salary bill, given their approximate salary range (an educated guess is okay). You can also include a cost-benefit summary – a statement of the cost compared to the benefits to be realised. <input type="checkbox"/>
Other	Any other contract information. For example, the start date in order to guarantee the timetable. <input type="checkbox"/>

FOR PREVIEW ONLY





High-level training proposal

TITLE AND OVERVIEW

Subject

Written by

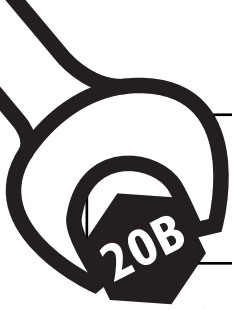
Commissioned by

Date

FOR PREVIEW ONLY

Continued . . .





High-level training proposal

... continued

INTRODUCTION	
Organisation and context	
Situation	
Requirements	
Areas to address	
Next steps	

FOR PREVIEW ONLY

continued ...





High-level training proposal

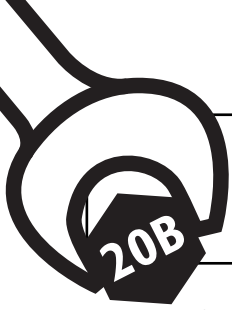
... continued

PROJECT DEFINITION AND PROGRAMME OBJECTIVES	
Overall aim	
Initial objectives	
Suggested approach	
Potential deliverables and milestones	
Scope	
Constraints	

FOR PREVIEW ONLY

continued ...





High-level training proposal

... continued

ABOUT US	
Department/ service CV	
Specialist areas	
Case studies	
Specific trainer CV	

FOR PREVIEW ONLY

continued ...





High-level training proposal

... continued

CONTRACT DETAILS

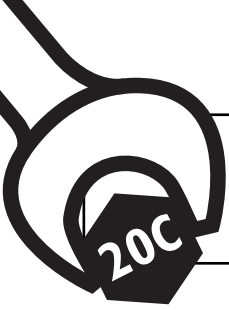
Timetable

Project fees

Other

FOR PREVIEW ONLY





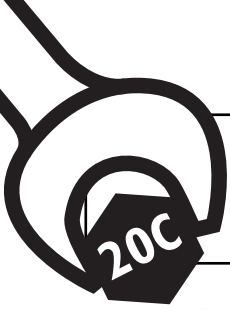
High-level training proposal – example

TITLE AND OVERVIEW	
Subject	<i>Supervisor training</i>
Written by	<i>Anita N Other, Training Adviser</i>
Commissioned by	<i>Andy Custom, Director, Engineering Applications Ltd.</i>
Date	<i>February 2003</i>

FOR PREVIEW ONLY

Continued . . .





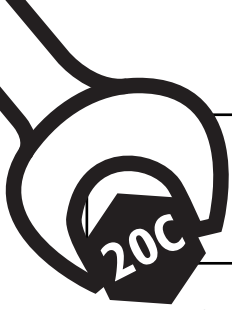
High-level training proposal – example

... continued

INTRODUCTION	
Organisation and context	<i>Engineering Applications Ltd. was formed as a separate operating company within the TB Group one year ago to service a specialist market. The organisation has 41 staff and three directors, and generates an annual profit of £2.3 million.</i>
Situation	<i>Engineering Applications Ltd. plans to double in size over the next four years and treble its profits. The current complement of 41 staff is divided into three main teams: sales, production and administration. There are currently seven supervisors (and a maintenance engineer), two managers, and a management vacancy. One of the three directors is acting as sales manager to cover the vacancy.</i>
Requirements	<i>Against this background of significant change, growth and expansion, the company recognises the need to develop its supervisory and management staff. We have been asked to propose an approach to developing supervisory staff in the first instance. It is anticipated that 14 supervisors will be required by 2007, and the company has expressed a preference for recruiting the shortfall from amongst existing staff.</i>
Areas to address	<i>There are two areas to be addressed: 1. Supervisor development: developing the supervisory competencies of existing personnel. 2. Talent spotting and development: identification and development of an additional pool of supervisory personnel.</i>
Next steps	<i>After an initial discussion with Andy Custom, we have identified a potential approach to meeting these needs. Details are shown in the following pages.</i>

continued...





High-level training proposal – example

... continued

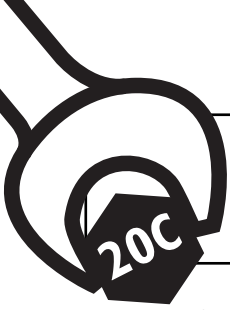
PROJECT DEFINITION AND PROGRAMME OBJECTIVES	
Overall aim	<i>To develop effective supervisory staff to meet the needs of the growing company.</i>
Initial objectives	<ol style="list-style-type: none"><i>1. All seven existing supervisors to be 'fully competent' to 'Level 1' in all eight core supervisory competencies by 30/08/04 (18 months)</i><i>2. Seven deputy supervisors to be identified by 08/02/04 (12 months)</i><i>3. Seven deputy supervisors to be 'fully competent' to 'Level 3' in all eight core supervisory competencies by 28/02/05 (24 months).</i>
Suggested approach	<ul style="list-style-type: none"><i>• Current team leaders attend the 12-month Team Leader Development Programme (TLDP) facilitated by ABC trainers.</i><i>• They also form a problem-solving group (Action Learning Group) assisted by a facilitator, to speed up the learning process through practice. The group to meet for one half day a month.</i><i>• One facilitator (myself) to act as a coach to the group, meeting once a month for an hour to check progress and set tasks, one of which will be to select a deputy.</i><i>• Line managers to complete competency audits on a quarterly basis, rather than the current once a year, to motivate the learners and to provide and to review progress.</i><i>• Supervisors to practise coaching skills learnt on their programme, by coaching deputies to 'Level 3' competencies, and assessing them on a quarterly basis.</i>

continued...

20



20-17



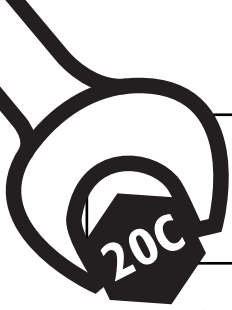
High-level training proposal – example

... continued

PROJECT DEFINITION AND PROGRAMME OBJECTIVES (continued)	
Potential deliverables and milestones	<ol style="list-style-type: none">1. <i>Team Leader Development Programme - seven places to start by 30/05/03.</i>2. <i>Monthly coaching meetings to commence by 30/05/03.</i>3. <i>Action Learning Groups to commence by 30/06/03.</i>4. <i>Quarterly competency audits for supervisors to commence by 30/08/03.</i>5. <i>Competency rating 'fully competent Level 1' for all seven current supervisors to be achieved by 30/08/04 in all eight core supervisory competencies.</i>6. <i>Seven deputies named by 28/02/04.</i>7. <i>Quarterly competency audits for deputies to commence by 28/02/04.</i>8. <i>Competency rating 'fully competent Level 3' for all seven deputies to be achieved by 30/08/04 in all eight core supervisory competencies.</i>
Scope	<p><i>This project will include all activities related to the development of seven supervisors via three main methods - the TLDP, coaching sessions and the Action Learning Group. Supervisors will be supported in the task of developing deputies through these methods. However, the project does not include any direct training of deputies or participation in competency audits.</i></p>
Constraints	<p><i>Please identify any constraints in relation to the following:</i></p> <ul style="list-style-type: none">• <i>Supervisors must be able to attend monthly coaching and Action Learning sessions as a group, and we must be able to enrol them in the TLDP in groups of three and four in order to meet the timetable.</i>• <i>Line managers must be available to support training activities via pre- and post-course briefings, and to conduct quarterly competency assessments.</i>

continued ...





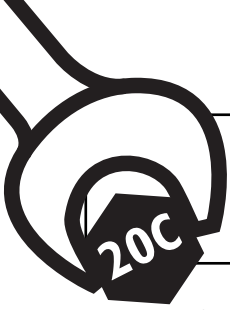
High-level training proposal – example

... continued

ABOUT US	
Department/ service CV	<p><i>We are the regional training function, servicing the NW Region of TB Group Companies. There are four of us in the team. I am the Regional Training Adviser and head up the team. As well as managing the function, I provide consultancy support and coaching services to business managers, facilitate a significant percentage of management development programmes, and sit on the Regional Quality Council. I have two trainers, Jane Smith, who specialises in technical skills, quality control and work management, and John Brown, who specialises in customer care, communication and leadership. Betty Cox is our administrator.</i></p>
Specialist areas	<p><i>Although we provide a full range of training and development services, either directly or through outsourcing of some training, we pride ourselves on the following specialities:</i></p> <ul style="list-style-type: none"><i>• Productivity improvements and time-savings through work management.</i><i>• Exemplary levels of staff retention through leadership.</i><i>• Large percentage of staff participation in suggestion schemes.</i><i>• A high level of internal promotions.</i>

continued ...





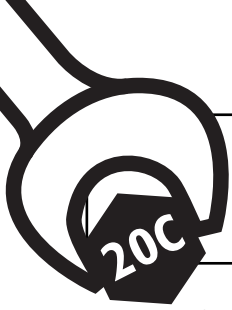
High-level training proposal – example

... continued

ABOUT US (continued)	
Case studies	<p><i>In 2002:</i></p> <ul style="list-style-type: none"><i>• We saved our region 1083 days at an average cost of £50 a day (G1 personnel), 263 days at £75 (G2), and 108 days at £125 (G3-G5). A total saving of £87,375 per year due to improved practices.</i><i>• We achieved our target to reduce staff turnover from 43% to 35% at a time when competitors are seeing staff turnover increase.</i><i>• 60% of G1 and G2s participated in the staff suggestion scheme, due to the competition we initiated, when the national average is 31%.</i><i>• 75% of our senior supervisory level vacancies (G3 and G4) were filled internally due to the deputy programme we started in 2001.</i>
Specific trainer CV	<p><i>Your trainers will be John Brown and myself.</i></p> <p><i>Team Leader Development Programme (TLDP)</i> <i>We are two of six trainers drawn from across the company, all of whom have been facilitating this programme for three years. Where possible, we will place your people with John Brown for continuity.</i></p> <p><i>Action Learning Group</i> <i>John Brown from my team has facilitated more than 20 Action Learning groups in the past two years, and is very experienced.</i></p> <p><i>Group Coaching</i> <i>I will be undertaking all group coaching. I have ten years' coaching experience and am a member of the International Coach Federation.</i></p>

continued ...





High-level training proposal – example

... continued

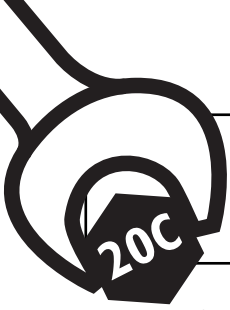
CONTRACT DETAILS

Timetable

- *March 2003 – project plans prepared. Participants and line managers briefed.*
- *May 2003 – supervisors start TLDP. Coaching meetings start.*
- *June 2003 – Action Learning Group starts.*
- *August 2003 – quarterly competency audits for supervisors start.*
- *September 2003 – quarterly project review meetings start.*
- *February 2004 – seven deputies named.*
- *February 2004 – quarterly competency audits for deputies start.*
- *March 2004 – coaching of deputies begins.*
- *August 2004 – ‘fully competent Level 1’ achieved for all seven supervisors.*
- *February 2005 – ‘fully competent Level 3’ achieved for all seven deputies.*
- *February 2005 – Coaching meetings end.*
- *February 2005 – facilitated Action Learning Group ends (may be continued without a facilitator).*
- *March 2005 – project evaluation and close.*

FOR PREVIEW ONLY





High-level training proposal – example

... continued

CONTRACT DETAILS

Project fees

Fee basis: trainer time is charged at £300 per day, £150 per half-day and £50 per hour. We do not pass on the costs of preparatory work, project meetings or evaluation activities. The TLDP is £675 per person. You will be responsible for travel costs in relation to TLDP and any accommodation required the night before workshops. We pay for any accommodation during workshops.

Therefore:

- Team Leader Development Programme (TLDP)
= £675 per person x 7 = £4725
- Action Learning Group
= £150 per month x 21 months = £3150
- Group coaching
= £50 per month x 22 months = £1100

TOTAL = £8975

(that is approximately £641 for each of the 14 supervisors and deputies - less than 3% of the salary bill for one year for the 14 personnel)

Cost benefit: the £8975 to be expended on this project will enable Engineering Applications Ltd. to stay on target to expand as planned and treble its profits from £2.3 million to £6.9 million a year.

Other

