Proposal How-to Guide

Use this How-to Guide to complete the project Proposal.

Purpose

The purpose of the Proposal is to clarify the problem that needs to be addressed, quantify the impact of the problem on the organization, and identify individuals, roles, and units that should ideally participate in any project to address the problem. It helps to organize the reasoning behind the project idea and can serve as a communication tool when evaluating and prioritizing projects and associated resources.

When to Use a Proposal

The Proposal should be used as a starting point to any process improvement project.

Related Documents, Tools, and Templates

The following tool will be referenced in the How to Use section. It may be a useful tool for completing the steps. This tool can be found at go.uillinois.edu/bpi_toolkit.

- SIPOC Map

How to Use a Project Proposal

Complete the following steps to create a project proposal:

1. **Complete the Purpose of the Engagement section.**
   Detail the problem and the desired result of the proposed project.

2. **Complete the Description of the Current System/Process section.**
   a. A high-level diagram can be created within the section or use the SIPOC Map at the end of the Proposal document. Be sure to identify those parties supplying input into the process (i.e., suppliers) or benefiting from an output of the process (i.e., customers).

   b. Identify those responsible for the process or steps within the process.

   c. Identify individuals and organizations participating in the process.

   d. Describe the financial impact of the process to the organization. If possible, describe the financial impact in terms of the stated problem (e.g., the problem described results in $X of losses, etc.).

   e. Describe how the process or identified problem is linked to the organization's mission, priorities, and strategic initiatives.

3. **Complete the Description of the Current System/Process Performance section.**

a. Summarize challenges expressed by participants of the process, collected informally (e.g., common complaints mentioned in meetings, emails, etc.) and formally (e.g., feedback collected through surveys, forums, etc.).

b. Summarize challenges expressed by customers collected informally (e.g., feedback received from customer calls, emails, etc.) and formally (e.g., feedback collected through surveys, customer forums, etc.).

c. Describe what a potential defect is for the system/process (i.e., the type of things that participants of the process must fix before the customer receives the good or service, or the types of things that customers would complain about).

d. Describe how the process performance is measured (e.g., performance metrics, service level agreements [SLAs] surveys, etc.).

e. Describe who would benefit from any improvement to the process and how the team would know that they benefited.

4. **Complete the Description of the Ideal System/Process section.**
   Describe the sponsor's view of how this process should be handled in the ideal state. Do not limit this description to what is believed possible through this project, but instead describe the perfect scenario.

5. **Complete the Risks or Potential Barriers for Success section.**
   Provide further explanations for the responses if needed.

6. **Complete the Engagement Details section.**
   Appropriately name the project, the system/process to be improved, the project sponsor(s), the process owner(s)/project manager(s) and anyone that should be included on the project team.

Tips

- It is recommended to meet in-person with the project sponsors to have the proposal-generating discussion.