

How I Wrote a Million and a Half Dollar Training Proposal in 3 Hours – and You Can, too!

Developing Your Proposal

1. Introduction
2. Action Plan: Stage one, Stage two, Stage three, etc.
3. Timeline
4. Narrative of Work
5. Flowchart
6. Summary of Inputs
7. Your Investment
8. Summary of Outputs
9. Authorized Signature
10. About Your Team

Proposal for

Company
Follow-Up Customer Relations/Service
Training and Development Program

Presented to:
San Antonio, TX 73292



Introduction

Your decision to continue the development of your employees through the design and implementation of a follow up customer service program, to increase the awareness of and improve the skills required for your employees to design and deliver training effectively, reflects a concern that is widespread throughout the increasingly visible public sector.

Our professional staff has carefully considered the concerns you have raised and developed a complete and thorough Action Plan that we recommend to accomplish your goals. We suggest that the program be professionally developed and implemented over the next sixty to ninety days to lay the groundwork for ongoing operation by your management and your training department.

Action Plan

Stage One: Program Creation and Development

Objective: To create and develop a thorough and complete follow up to the customer relations/service program tailored to _____ Company.

Strategies:

1. We will survey those who have attended the original customer relations training program to gain input on parts of the original program that they would like to see expanded in the follow up program. This will give us valuable input and aid in implementing the completed program for your customer service clerks.
2. We will create, write, and edit all elements of the follow up to the customer relations/service training program including:
 - a. We will create and develop a one day follow up to the customer relations/service training program tailored to the _____ Company to be attended by your customer clerks.
 - b. We will help develop the basic attitudes and skills needed to provide everyone connected with _____ the courtesy, respect, recognition, and appreciation that will continue to make _____ a good place to work and a good company to do business with.
 - c. We will incorporate into the one day program the latest job enrichment strategies that have emerged in our research into improving productivity for customer service clerks. This will include specific and immediate strategies that clerks will be able to implement to make their jobs more rewarding and more enriching, and that will enable them to be even more effective for the company.



Stage Two: Production of the Program

Objective: To complete production of all the elements of the customer relations/service and retail sales training program and campaign we have developed.

Strategies:

1. We will supervise production of the presentation and follow up materials needed to complete the training program and campaign.
2. Some of the identified topics are:
 - a. Handling difficult customers face to face.
 - b. Handling difficult customers over the phone.
 - c. Handling calls to slow-paying/delinquent customers.
 - d. How to add excitement and challenge to the customer clerk role and responsibility.
 - e. How to create change and growth in order to enrich the job of customer clerk.
 - f. How to give customer clerks a sense of achievement and recognition.
 - g. Helping the customer clerks to see themselves as professionals.
 - h. Developing the attitudes/skills/plans needed to succeed in customer relations/service and sales.

Stage Three

Objective: To introduce the _____ Company follow up to the customer relations/service program to a pilot group of clerks and your trainers, to implement it for maximum effectiveness.

Timeline, Narrative of Work and Flowchart

Attached to this Action Plan you will find a project flowchart, a project timeline, and a narrative of work which describes in greater detail the steps that we implement in order to accomplish your objectives.

Your Investment

Included in the Action Plan we have outlined are the following:

1. Robert W. Pike and staff will personally supervise the creation and development of all the elements of the program. This includes several days of research, planning and preparation.
2. Robert W. Pike or senior consultants will personally conduct all of the planning and presentation sessions and the training sessions specified in the Action Plan. This includes several days of research, planning and preparation so the time spent will be utilized for maximum effectiveness.
3. Our staff will create, develop, and write the materials that will be used, by your management and personnel in the training program. This will include all research.



4. Our staff will supervise the production of all printed materials.
5. We will plan to be available Thursday evening before the presentation to informally answer questions for 1 hour.
6. We will plan to meet for dinner Friday evening.

Your Total Investment

_____ plus _____ per person for materials.

Terms: 1/3 upon acceptance of this action plan

1/3 upon completion of the materials for the one-week campaign,
and 1/3 upon completion of the pilot.

Travel expenses will be billed in addition. The expenses will include regular coach airfare, meals, lodging, and misc. tips.

This includes:

1. Development of the program.
2. Conducting a pilot program for approximately 20 people.
3. Training 1–3 of your trainers to continue the program for others.
4. Materials for the additional programs would also be at \$20 per person.
5. Train the trainer manual and presentation materials for your instructor.

Summary:

We feel this Action Plan can continue _____ Company’s exciting and productive customer relations/service campaign that is not only creating a more attractive environment for your customers, but which is also creating a more attractive environment for your employees, in which to work. This gives you the double benefit of increasing employees satisfaction and loyalty and increasing customer satisfaction and loyalty.

It provides you with:

1. A program tailored to your needs,
2. A pilot program that serves as a train-the-trainer program, providing you with considerable cost savings, and
3. The ability to continue to lead the program, as needed, on an in-house basis. To ensure its success, we will provide priority attention and draw on the best resources of the staff, which has been active in the creation and development and execution of some of the most successful training programs in the country, including programs for Georgia Power, American Express, Upjohn, Pfizer, Walt Disney, and many others.

Accepted by:

Authorized Company Representative

Principal

Date



Project Timeline

Weeks into Project

#	Function 0	1	2	3	4	5
1	Analyze Needs					
2	Specify Objectives	█				
3	Choose Training Techniques		█			
4	Develop Participant Materials		█			
5	Develop Faculty Materials			█		
6	Conduct Training				█	
7	Assess Training Accomplished					█
8	Develop Reinforcement Material					█
9	Report Program Results					

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Narrative of Work

This narrative of work covers the primary elements of the training project.

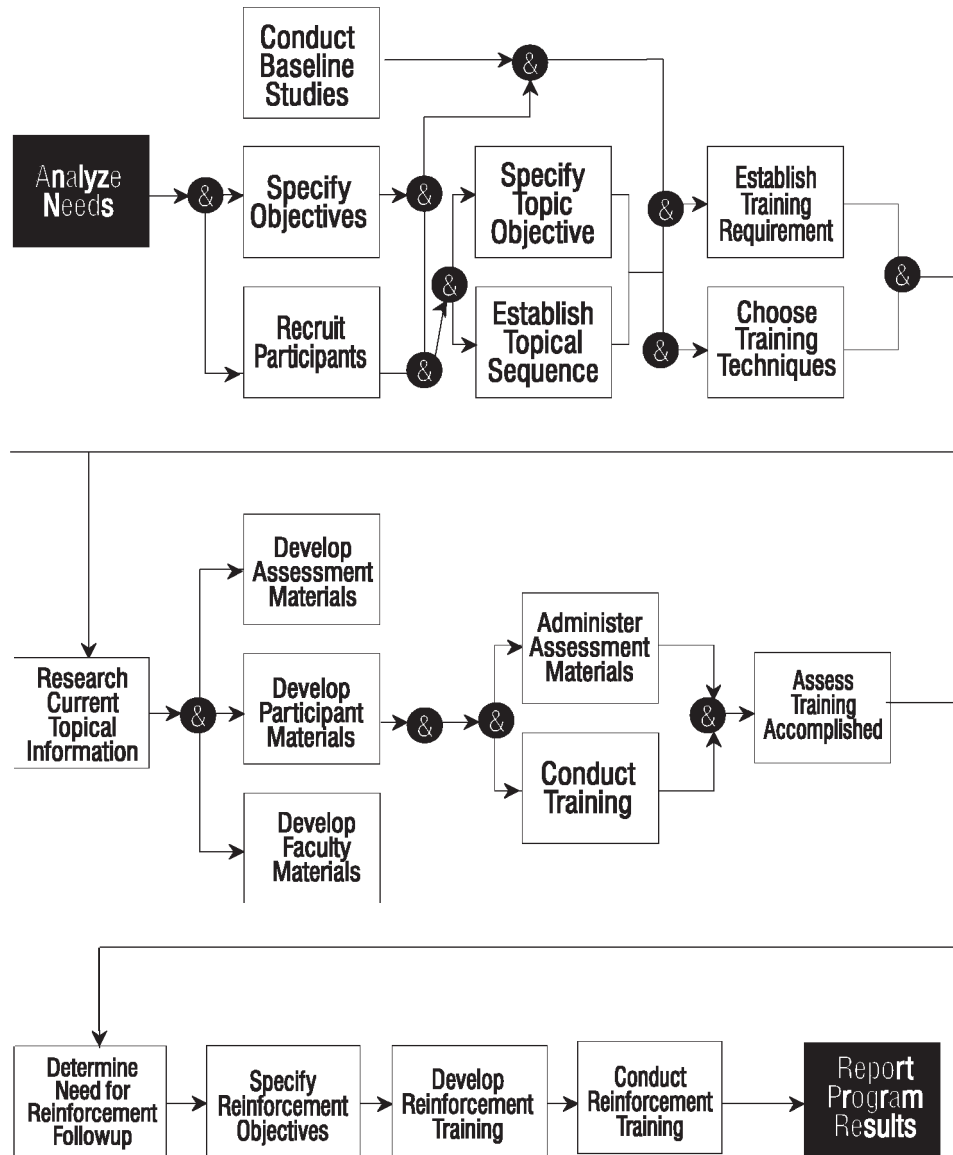
1. **Analyze needs.** Here we clearly define why we are undertaking the development of the materials. Why is the training needed? Who says that this particular type of training is needed as opposed to other types. This is particularly important from the viewpoint of participants. The first step to a successful training program is having the participants feel that it is going to meet their most pressing needs. This step gives us what we need to do that.
2. **Specify objectives.** What do we want to accomplish as a result of this training program? By going through a simple analysis we are able to have a clear-cut yardstick by which to measure our achievements. How will we know that we've accomplished our goal if we don't know what our goal is? This step clarifies for all concerned what it is we want to accomplish.
3. **Choose training techniques.** Any training course requires a variety of training techniques carefully chosen. A variety of appropriate techniques increases participation by the learners with the payoff of more learning. At least 37 different training techniques and/or combinations can be used in designing the course and course materials.
4. **Develop participant materials.** We have found that well-designed resource workbooks increase "on-the-job" use of the skills learned. Well-designed projects, case studies, checklists, graphs, and resource guides keep the participants referring to the materials long after the training session is over. For this project we will be developing a customer service/courtesy effectiveness grid that serves as a self-rating on qualities and characteristics most desired in employees by customers.
5. **Develop faculty materials.** The result of this step will be a complete script of the training program in fifteen minute increments along with the appropriate audio-visual reinforcement materials. This step "dots the i" and "crosses the t" to make the training materials complete. It also ensures that each of the presentations needed to cover all employees will be consistent and cover the same vital content.



6. **Conduct training.** This will include the pilot session conducted by us as well as the sessions your own trainer will conduct.
7. **Assess training accomplished.** Taking the needs and objectives originally identified, this step will ensure that these were met or provide the input needed to revise the materials to meet the objectives.
8. **Develop reinforcement materials.** One of the biggest mistakes in training is not providing for post-session follow up when and if needed. This step provides an opportunity to maximize the training experience through the design of reinforcement materials that can help each participant make continuous “on-the-job” use of what’s been learned.
9. **Report program results.** This is the final summary that indicates how well each step went and areas that could be improved on future projects. It documents that “that which was to be accomplished” was, in fact, accomplished.



Flowchart





About Your Team



Bob Pike, CPLP Fellow CSP, CPAE has developed and implemented training programs for business, industry, government, and the professions since 1969. Beginning as a representative for Master Education Industries, he received nine promotions in three and one half years, to Senior Vice President. His responsibilities included developing an intensive three-week Master Training Academy covering all phases of sales training, management development, communications, motivation/ platform skills and business operations.

During his five years as Vice President of Personal Dynamics, Inc., that company grew from less than 4,000 enrollments per year to more than 80,000. He pioneered undergraduate and graduate credit on a national basis.

Bob leads sessions over 100 days per year covering topics of leadership, attitudes, motivation, communication, decision-making, problem-solving, personal and organizational effectiveness, conflict management, team building and managerial productivity. He has shared his ideas and consulted in more than 23 countries during his career. More than 125,000 trainers worldwide have attended what is currently called Bob Pike's Master Class in Instructor-led, Participant-Centered Training. As a consultant, Bob has worked with such organizations as Pfizer, Upjohn, Caesars Boardwalk Regency, Exhibitor Magazine, Hallmark Cards Inc. and IBM. A member of the American Society for Training and Development (ASTD) since 1972, Bob has been active in many capacities including three National Conference Design Committees, Director of Special Interest Groups, and member of the National Board of Directors. He has also served on the Board of Directors for the National Speakers Association and the International Alliance of Learning.

An outstanding speaker, Bob has presented at regional, national, and international conferences, including the ASTD (now ATD) and Training Magazine Conferences to audiences ranging from 300 to 3000 people. In 1991 Bob was granted the professional designation of Certified Speaking Professional (CSP) by the National Speakers Association (NSA). This designation has been earned by fewer than 9% of the more than 3,800 members of the NSA. In 1999 he was granted the professional designation of CPAE (Council of Peers Award of Excellence) Speakers Hall of Fame. In 2007 the Instructional Systems Association presented Bob with its Thought Leaders award for lifetime contributions to the field. In 2007 TrainingIndustry.com also named Bob as one of the 20 most influential people globally in training and performance improvement. In 2013 Bob was the second person named a CPLP Fellow by the American Society for Training and Development (ASTD).

He writes a monthly column called "Trainer Talk" for TRAINING Magazine and is the founder/editor of the Bob Pike's Training and Performance Forum – a newsletter he has written monthly since 1989. He is author of the all-time best-selling train the trainer book ever published – *Bob Pike's Master Trainer Handbook*, *The Creative Training Techniques Handbook* (renamed in 2015 to *Bob Pike's Master Trainer Handbook*); *Developing, Marketing and Promoting Successful Seminars and Workshops*; and *Improving Managerial Productivity*, along with more than 27 other books and a dozen videos.

About Your Team (continued)



Trish Uhl, PMP, CPLP... With over twenty years as a consultant in the learning & performance profession, Trish Uhl is a globally recognized expert for her work in delivering innovative training, facilitation, and coaching services to clients around the world. Whether in front of a class, or behind the scenes, Trish works with L&D peers aligning initiatives to business strategy to deliver transformative, high impact learning experiences that drive organizational outcomes and achieve bottom line business results. Recognized by the Association for Talent Development (formerly the American Society for Training & Development) as an innovative “Pilot Pioneer” - one of its first Certified Professional in Learning & Performance (CPLP®) designees - and by Training Magazine as a Top Trainer, Trish is recognized for her peer development, learning leadership, and mission to radically transform the profession formerly known as “training.”

PROFESSIONAL QUALIFICATIONS

- Certified SolutionPeople Innovation & Creativity Trainer
- Certified Professional in Learning & Performance (CPLP®)
- Certified Project Management Professional (PMP®)
- 2011 President, Chicagoland Chapter ASTD (CCASTD)
- 2009 Top Trainer Award, Training magazine

PUBLICATIONS

- Author, “*Mastering the CPLP: How to Successfully Prepare for – and PASS! – the CPLP Knowledge Exam*”
- Contributing Author (with Elaine Biech), “*101 Ways to Make Training Active*” (Wiley & Sons)
- Contributing Author (with Renie McClay), “*10 Steps to Successful Teams*” (ASTD Press)
- Contributing Author, “*Fortify Your Sales Force: Leading and Training Exceptional Teams*” (Pfeiffer)
- Contributing Author, “*111 Ideas to Engage Global Audiences*” (Learnipape)

AT A GLANCE

Certified Professional in Learning & Performance (CPLP®)

Certified Project Management Professional (PMP®)

Certified SolutionPeople Innovation & Creativity Trainer

Top Trainer Award Recipient, Training Magazine

CARA PURE Award Recipient

Published Author on the Topics of L&D, High Performance Teams & Technology

SPEAKING ENGAGEMENTS & CONFERENCES

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Join Bob & Trish in October in ARIZONA

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 - 1.5 day Consulting Business Jumpstart for those starting (annual revenues less than \$100,000) - or who want to start - a consulting business.
- **LIVE EVENT #2: Are You Ready to Take Your Business to the Next Level?**
 - 2.5 day Business Building Summit for established consultants (over \$100,000 in annual revenue) who want to build a business beyond a practice - with significant passive income.

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