

## **Identify Opportunity**

- Identify a need within the organisation
- Take the lead about instigating a change
- Ensure it is something that will impact your business positively

## **Gather information**

- Get as much information as possible to get a balanced view
- Always have facts and figures to back suggestions for change
- Ask for input from your team members; perhaps you could use a survey from the Customer Service modules

## **Produce an overview proposal**

- Use one of the organisational plans and adapt for a 'pre-plan'
- Create space for notes for your Line Manager
- Get buy-in from some key players in your team to support, guide and be objective

## **Gain support from your manager**

- Organise a meeting
- Go to the meeting with multiple copies of your proposal
- Communicate your ideas enthusiastically
- Be prepared for the initial comments/questions
- Also be prepared for your proposal to be shelved for a later time

## **Once support is given, finalise your plan**

- Add in any feedback/comments from your manager
- Ask someone with good literacy skills to proofread work and check grammar
- Stylise presentation of document
- Delegate duties to each of the team members, utilising their strengths
- Try to anticipate what feedback you may receive and see if you can add it in beforehand

## **Final approval**

- Make all adjustments from the manager
- Be clear on what had been committed to by your manager
- Celebrate success!