

# How to Make Winning Recommendations

The other day an executive friend charged with recommending a health care plan for his organization asked me the best way to pitch Company X's program to his board. He said, "Cheryl, I know what I want, but I don't really know how to structure the proposal". This month's article focuses on how to make quality decisions and get recommendation approval from others.

Back in my youth, I was fortunate to study the process magic of the Kepner Tregoe approach. The wisdom of Chuck Kepner and Ben Tregoe brought structure to my impulsive brain and taught me that we can make better decisions by gathering, organizing and evaluating information systematically.

Why is a process necessary? What's the matter with going with the gut? What trouble might we run into if we don't follow a systematic thinking methodology? Most of us suffer from a disease called "Premature Jumping" where we consciously or unconsciously focus on our favourite choice and then justify that choice. In other words, we find ourselves at the end before we've thought about the beginning and middle.

## DECISION STATEMENT

Read again my friend's decision statement; "Pitching Company X" to his board. Notice he's already made the automatic leap to Company X. Go back a step. Think about what prompted the need



to make this decision. Wouldn't a better decision statement be: Selecting the best health care solution for the organization?

Thoughts open up. Let's put it in a non-work context. You think you want to buy a car to get to work and you're already picturing yourself behind the wheel of a sexy little Mini. Now change the decision statement to "Selection of the best method to get to work?" This statement enables an entire new range of possibilities including utilizing the GO train, combining summer cycling with winter bussing, as well as purchasing a new or used vehicle.

Once we ascertain the correct decision statement, there are three key components of decision making whose initial letters spell out the word OAR: Objectives – Alternatives – Risk. Everyone loves acronyms.

## OBJECTIVES

After clarifying the goal, the next step is to identify the criteria defining all the results we would like to achieve from the decision. Questions like....

- What results do we want this decision to achieve in the short and long term?
- What needs are important to stakeholders who will be impacted by this decision?
- What resources are available (money, time, people, equipment, etc.)
- What constraints or restrictions apply?

A subset of objectives is categorizing "must" objectives and "want" objectives. "Musts" are measurable and mandatory and become a "go/no go" gateway. So, if \$1,000 is your total financial availability, it would likely eliminate the purchase of a new car unless it was stolen! Additionally, not all "want" objectives are of equal value, so some decision-makers like to weight their wants on a numerical or high-medium-low scale to indicate the relative importance of each. Using our transportation example, "economical" might be critical to a starving student but "comfort" might be more important to a seasoned manager who spends 90 minutes on a daily commute.

Broaden your thinking to incorporate the objectives of all people who are involved in or impacted by the decision.

## ALTERNATIVES

Now it's time to:

- Generate alternatives (involve others and brainstorm)
- Screen alternatives through the "must" gate
- Evaluate alternatives against the "want" objectives

Through this process, some options are eliminated (those that fail the "must" test) and some others will look better than the rest. This can be made more scientific-looking by applying numerical assessments.

It's awfully tempting at this point to choose the alternative with the highest total score. But there's still one more thinking process to apply.

## RISK

Life is filled with surprises. To prevent Murphy from destroying your decision track record, scrutinize the leading alternatives. Ask yourself:

- What could go wrong if we chose this option?
- What is the likelihood that this might occur?
- What might I do to prevent it from occurring?
- If it does occur, what would be the effect?
- What might we do to minimize the impact?

The component elements of risk assessment are identifying threats, probability and seriousness.

Decision Statement – Objectives – Alternatives – Risk. Now you're equipped to make the decision. The best selection will be the solution that balances the greatest gain with acceptable risk.

In our participative work environment, most decisions require the acceptance or approval of others. How do we present it to others? By following these guidelines:

- Be concise
- Present data logically
- Demonstrate the thoroughness of your analysis
- Ensure objectives and weightings represent not just your views but those of your constituency