COIN

BF

Coach your team members to follow COIN when they need you or someone else, to approve a new project, idea, expenditure, etc.

Have them present each "letter" as a separate slide or step in the request. Presenting each point separately enables the leader to understand what and why the requestor is providing that information. For larger, more complex decisions, have them lead with the four letters initially for clarity, then have the background and supporting materials to support their COIN sections later in the document/presentation.

Implementing this easy technique will help you set expectations for decision requests, and it will also save you time by getting the necessary information presented upfront.

CAUSE
What is the cause or purpose you are addressing? Why are you proposing it?

Example: Our current invoicing processing is slow and causes invoices to not be paid within our committed timeframe. Several factors are driving this:
- Too many steps in the approval process.
- The Designate of Authority (DOA) criteria are set too low, causing bottlenecks with key leaders.
- The current approval system lacks a notification alert for past due approvals.

OPPORTUNITY
How will this move the needle towards achieving your outcome(s)?

Example: We can process invoices 1.5 times faster per day.

IMPLICATIONS
How would this affect our current organization? What is needed to achieve it?
This "letter" should address what the team/ individual will need to accomplish the work, i.e., budget, schedule, and resources.

Example: If approved, we need:
- Budget: $50k
- Time: 50% from Tom, Joe, and Elaine from Finance to work with us for three weeks.
- IT support, as needed.
- Outputs will include a DOA policy revision and an update to the invoice approval system.

NEXT STEPS
What are the next steps for execution?

Example:
- Schedule a kickoff with the key stakeholders and contributors.
- Capture policy revisions for approval.
- Implement approval process enhancements to the current system.
- Develop a communication plan for the organization.

Over time, using this technique should help your team be better prepared, and you'll get clarity into why you should (or should not) approve the request.