

IMPACT

MODULE 3
BEST PRACTICES
Proposal Examples

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OVERVIEW

PROPOSAL EXAMPLES

The following pages include three examples of proposals. Before reading the examples, I wanted to share a bit of context. First and foremost, you will see what it looks like for me when I say I keep it simple. As mentioned in the video, always do what feels best for you. These examples are not meant to be a formula but to inspire or simplify what may feel more complex than it needs to be.

While the "overview" sections have similarities, you will notice I use different language based on the conversation I had with the potential client, their bosses, and their goals.

There are three kinds of proposals:

Executive Coaching

- A 6-month engagement, which included intake calls/leadership assessment and intensive coaching.
- The executive in this example was high functioning, reported to the CEO, was very successful, and was a long-term employee and leader who had started to struggle with stress and health issues as a result.

2-Day Team Training

- This was a client who had received 1:1 coaching for a number of months and wanted to do training for his leadership team.

Phase 2 Leadership Development

- This is an example of a phase 2 proposal with the next level of leaders.
- Phase 1 included intake calls with a group of leaders within the organization, 1:1 intensives with each of the exec team members, and an off-site meeting with all of them.

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PROPOSAL EXAMPLES

EXECUTIVE COACHING

Your Name	EXECUTIVE COACHING PROPOSAL: (INSERT NAME)

DATE

Executive Coaching Overview for (insert name)

Overall, our time together will focus on coaching and development designed to support (insert name) in accessing new levels of resilience, well-being, and effectiveness while continuing to leverage and enhance her strengths as a strong, well-rounded, and respected leader.

Coaching is focused on personal and professional development and is grounded in the role state of mind has in our moment-to-moment performance, communication, and resilience.

Approach:
Coaching will take place over a six-month period and will include in-person and virtual sessions. Sessions will be strategic and developmental in nature focusing on relevant and timely issues allowing for direct application in the business.

This is designed to create a robust and customized development program that includes: verbal leadership assessment, 3-day leadership intensive at the start of our work together, followed by 6 months of virtual coaching, with the option of additional in-person sessions when relevant and needed.

Leadership Assessment:

- In-depth, one-on-one conversations with key individuals/stakeholders. This would include supervisors, direct reports, peers, internal customers and anyone else that would be beneficial. Average 6-8 calls

Leadership Intensive:

- 3-day in person session that allows us to explore the feedback and increase understanding of development opportunities. This format allows for significant change in minimal amount of time. We are able to build strong foundation and momentum that is more sustainable when returning to work.

- Intensive can take place in Portland, OR, NYC or San Francisco.

Virtual and/or In-Person Coaching:

- 6-month coaching focused on integrating the learning that takes place during the intensive into everyday leadership role.

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PROPOSAL EXAMPLES

EXECUTIVE COACHING

Your Name	EXECUTIVE COACHING PROPOSAL: (INSERT NAME)

- Throughout the six months, I may also suggest additional resources such as books, articles, and audio/video.

- Calls take place an average of every other week. However, based on client needs and preferences some choose to do shorter calls on a weekly basis during more demanding times.

Potential In-Person Coaching Sessions:
Often during a client engagement, the leaders may bring me in for specific meetings, observations. This is done on an as-needed basis.

Our working relationship:
I consider myself your partner during our time together. This means that in addition to the above, I am available for "on-the-spot" coaching and feedback by email or phone, and you have my priority support.

Timing:
Assessment Interviews: Completed in August
3-day Leadership Intensive: August/September
Regular coaching sessions begin immediately following the intensive. That said, we can set up any calls prior if that would be beneficial.

Cost for Full Program: _____
*does not include any T&E required
50% paid up front
50% due 90 days after start of contract

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PROPOSAL EXAMPLES

2-DAY TRAINING

INSERT COMPANY LOGO

LEADERSHIP RETREAT AND TRAINING

OVERVIEW
Create and deliver a customized leadership experience designed to share how an understanding of our mind and our deeper nature allows us to access new levels of performance, resilience, and well-being.

When we understand the principles behind our internal state, we bring forth more wisdom and insight into our work and relationships. We are more agile and creative and increase our ability to navigate change, respond to client demands, and build strong connections.

APPROACH

Intake calls:

- Prior to the leadership retreat, we will conduct intake interviews with each of the participants.
- These are 30-minute confidential conversations that allow us to build rapport, get to know the individuals, and begin to build relationships.
- They give us insight into the individual and the organization and help us create a more relevant and meaningful experience.
- The conversations also help them know a bit about what to expect, so people show up more open and relaxed, which allows us to go deeper sooner.

2-Day Leadership Retreat:

- The leadership retreat is insight-based, experiential, and reflective. It is intentionally designed to deepen impact, understanding, and insights that foster higher-quality thinking and allow individuals to move through leadership and change with more clarity and ease without sacrificing well-being or relationships.

Follow-Up:

- 2-hour team webinar to support further integration.

Further Integration:
After this phase is completed, we can explore different possibilities, such as one-on-one coaching, webinars, group sessions, etc.

Date: TBD

Location: We suggest going off-site for the retreat.

Investment: _____
**This does not include costs for travel or lodging. Those expenses will be submitted separately.*

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PROPOSAL EXAMPLES

PHASE 2: LEADERSHIP DEVELOPMENT

INSERT COMPANY LOGO

PHASE 2 TEAM DEVELOPMENT PROPOSAL

Date

OVERVIEW:
Overall, phase two includes the development of project managers, support leaders, and the director of communications, with the goal of strengthening leadership capabilities in communication, driving vision, feedback, leadership presence, and influence. This includes how to be effective role models and help create an engaged, healthy, and thriving culture at (INSERT COMPANY NAME).

The development will be built on the foundation and role of state of mind and its relationship to EQ, leading others, resiliency, creativity, responsiveness, navigating change, and client demands.

APPROACH
We will take a team approach to developing project managers and support leaders while also offering one-on-one coaching and support. This allows me to address specific feedback and coaching tailored to individual needs.

Engagement will take place over a 4-month period and will include leadership assessments, a 1-day virtual session with each person, an online learning component, a 2-day leadership team retreat, and three months of virtual coaching.

LEADERSHIP ASSESSMENT
Similar to what we did for the exec team, I will conduct confidential, one-on-one conversations with key individuals. This would include supervisors, direct reports, peers, internal customers, and any key roles that would be beneficial. We can discuss the best strategy for achieving a well-rounded view and feedback for each leader. Includes 15-18 interviews.

INDIVIDUAL LEADERSHIP INTENSIVE
A 1-day virtual session with each leader for a total of 7. During the intensive, we will explore individual leadership feedback, development opportunities, practices, and strategies for change.

2-DAY LEADERSHIP TEAM RETREAT/TRAINING
We will bring the leaders together for a 2-day leadership training. During these two days, we will train on: leading from the front, leadership presence, powerful feedback & communication skills, influencing, coaching, and developing others, and leading change (responsive/agile/clear).

We can also use this time to discuss relevant (insert company) priorities, projects, and any other important issues.

The overall goal is to begin fostering strong leadership at all levels while building on the strengths of the (insert company) team and culture, resulting in continued excellence, meaningful work, and strong relationships across the organization.

ONLINE STATE OF MIND PROGRAM
This will help create a foundation and a common language across the leadership team for state-of-mind and the role it plays in EQ, attitude, resilience, leadership, communication, problem-solving, agility/change, and creating a thriving culture that fosters well-being and excellence. This includes 10 people participating.

INDIVIDUAL COACHING

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PROPOSAL EXAMPLES

PHASE 2: LEADERSHIP DEVELOPMENT

INSERT COMPANY LOGO

PHASE 2 TEAM DEVELOPMENT PROPOSAL

Coaching includes the four PMs, two support leaders, the communications director, and three executives for a total of 10 people. It will take place over a three-month period and can include a mix of individual coaching and team sessions. It begins after the individual leadership intensives.

All coaching will be responsive to the immediate needs of the individual and team and will focus on relevant and timely issues. Coaching is developmental and strategic and allows for direct application on the job. We will determine specific areas of focus for the individual leader.

Coaching may also include support with greater team conversations, feedback, facilitation, and alignment. This includes ongoing coaching for the exec team.

The coaching pace and timing can be set by each leader. The proposal includes an average of 3 calls (one per month) per person but can be distributed in a way that supports the greatest need.

In addition to the above, I am available for on-the-spot coaching and feedback by email, phone, or slack as needed.

POTENTIAL TIMING
January/mid-February: intake interviews & individual intensives with PMs, Support Leaders & Communications Director

February/mid-March: complete individual intensives, exec team follow-up call, in-person 2-day leadership training

March-May: Online program, individual and team coaching

INVESTMENT: _____

- Does not include T & E.
- 50% due upfront; 50% due 100 days after the start of the engagement

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