***Sample* Proposal – Executive Development & Coaching**

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| **Customer Team** | M&E Leadership Director Team |
| **Stakeholder** | Jane Smith, CFO |
| **Request Date** | January 15, 2020 |
| **Proposal Date** | February 1, 2020 |
| **Interviews Conducted** | Jane Smith, January 15, 2020Earl Jenkins, Director M&E, January 17, 2020Tell them who you spoke with to gather your info – it’s like being one step ahead of their questions.Nisha Talor, Director M&E, January 20, 2020Ola Fronter, HRBP supporting M&E, January 17, 2020 |

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| **Need** | Overall, directors are performing at a manager level. Jane would like to help her director team improve their leadership skills and business acumen, so they can more effectively lead the expanding M&E organization and support the goals of the organization. Areas of specific focus that will support this expectation are:* Shifting from a tactical to strategic mindset
* Building presentations geared to senior leadership and being able to present with confidence
* Demonstrating executive presence
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| **Objectives**Be sure to tell them not just the training objectives, but also the expected impact to business success. | Program objectives:* Build the M&E senior leadership bench
* Raise the day-to-day work focus to a strategic level, delegating tactical tasks to the management team
* Improve the executive presence of the individuals on the director team

Training objectives:* Demonstrating a strategic approach
* Develop and deliver a presentation that influences the audience to take action
* Understand the importance of executive presence and identify a personal branding plan
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| **Proposal** | The most effective development opportunities for senior leadership are individualized, focused on perceptions and candid feedback, and with opportunities for skill building.2020 Recommendation:1. Facilitate the *Strategic Thinking\** class (2.5 days) for directors in M&E, working through a current issue pertinent to the department as the action project
2. Offer a voluntary *Executive Presence\** seminar (2 hours) to directors
3. Internal executive coaching
	1. Pair directors with an internal coach
	2. Conduct 360° assessments

\*Course descriptions:* *Strategic Thinking* class – This class teaches a decision making process and focuses on articulating the issue to be solved, choosing the most efficient solution and presenting a recommendation to leadership.
* *Executive Presence* seminar – This seminar focuses on creating presence—those verbal and nonverbal cues that gives others an impression about ourselves—and especially “executive” presence.
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| **Timeline** | March 2020 – November 2020 |
| **Budget Estimate** | $41,000 for the three-fold recommendation:* $25,000 – *Strategic Thinking* course
* $1,000 – internally developed Executive Presence seminar
* $10,000 – 360° assessments

It’s always a good idea to break out the program fees, even if estimated.* $5,000 – logistics and program fees
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| **Project Team** | Bob Brown – Manager, Training & DevelopmentGwen Trong – Manager, Talent DevelopmentJuan Guerra – Senior Designer, Training & Development |

You know what your executives, stakeholders and boss likes to see. Include additional sections as needed to lay out the proposal.