***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, 2020  Earl Jenkins, Director M&E, January 17, 2020  Tell 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, 2020  Ola 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 |
| **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 |
| **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. |
| **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 |
| **Project Team** | Bob Brown – Manager, Training & Development  Gwen Trong – Manager, Talent Development  Juan 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.