

# Drafting an Effective Proposal

## Overview

A proposal is a selling document. An effective proposal needs to accurately state the compelling need and your solution. In that order: first highlight the need, then how your plan addresses the need. Your discovery work with the team leader or team sponsor gave you the storyline, now you replay that storyline and remind the client/buyer why this initiative is so important, and important now.

We use the word “storyline” intentionally. A good story has drama; it is clear from the beginning of the story that something dire will happen — inevitably and catastrophically — unless there is change that takes the story in a very different direction. An effective proposal, like a good story, sets up that sense of urgency. Without a sense of the drama — the consequences if the train jumps off the track — all you have left is a shopping list of deliverables and a price that goes with it. In that case your client will focus on price rather than the value of saving the team train from going over the cliff.

## Structure

There are many different ways to structure a proposal. In this document we propose one version — you may already be working with a structure that is working for you. There is no “right” way to present the proposal except perhaps to make sure that the first thing the client or sponsor reads is about the team and the team’s (dire) situation, and not about your experience or expertise, or even the proven effectiveness of TCI’s Team Diagnostic™ tools and methodology.

## Executive Summary

**Worth noting:** In some cases you will want to include an Executive Summary of your proposal for key decision-makers who are not directly involved in the design of the team coaching assignment. The summary may be intended for a senior executive who has relevant interest but not daily interaction with the team; the summary may be a request from someone in HR who is following the team’s performance.

The Executive Summary should be brief — one page ideally — focused on the outcomes of the engagement and if possible targeted to the interests of the intended reader. If the intended reader is a senior executive then impact on business results will be key; if the intended reader is an HR representative you may be emphasizing the impact on team dynamics (to achieve improved business results.)

*The Digital Library contains a sample Executive Summary.*

## ***The Challenge***

This one brief paragraph sets up the situation as you understand it. It addresses the question, “Why team coaching? Why now? What makes this important to the organization?” In short, “the problem” and the value to the organization if the team improves.

## ***The Objective***

Again, in one clear, brief paragraph, what is the goal of the engagement? How does it fit into the larger picture for the organization? The objective has a sense of strategic picture to it — different from “outcomes” which will be more specific and what we cover next.

## ***Outcomes***

You may write a brief paragraph that summarizes outcomes, or you may use bullet points to list specific outcomes. These outcomes need to relate to specific team needs that you uncovered in your discovery conversation. You may want to add something in this section pointing to the information that will be available after the assessment is complete, along the lines of, “Naturally the assessment will provide a rich resource of information about where the team is already strong and areas of opportunity to improve team strengths. Outcomes from that first session working with the team will reflect what we learn from the assessment and from the team conversation. The goal for this work is a clear set of action steps.”

### **Specific outcomes include:**

- > Outcome #1:
  - Example: a clear picture of where the team is today and a map for team improvement
- > Outcome #2:
  - Example: clarity of team mission and purpose
- > Outcome #3:
  - Example: team agreements around feedback and conflict

### **Another example:**

“The goal of the team coaching process is to shift the culture of the team while maintaining team productivity.”

### **Desired outcomes:**

- > Improve collaboration
- > Improve communication
- > Improve decision making process and speed
- > Build a stronger team, pulling together for a common purpose
- > Be an effective leadership model for the business unit

## ***The Approach***

This is your opportunity to describe the way you will work with the team. What is your process? Here you outline the key elements of your approach and why they are important. Here are sample components of a team coaching approach, using the Team Diagnostic™.

### **Team Diagnostic™**

Brief description of the assessment and the online process of taking the assessment — remember to include features, advantages and benefits.

### **Team Training and Team Dialogue**

Include a reference to training in the model to create a common language, and the interactive nature of the session — effective adult learning includes engaging the team in real conversation.

### **Follow-up Coaching**

Your proposed plan for the ongoing coaching sessions.

### **Second Assessment**

Describes your plan for a re-deployment to give the team a “Before” and “After” picture and a chance to design next steps for the team.

## ***Pricing***

Here you list the relevant elements in your pricing model. For example:

The project includes:

- > Team Diagnostic™ and re-deployment follow up
- > A two-day off-site session working with the team in person; two team coach/facilitators
- > Six monthly follow up coaching sessions; half-day each, in-person at the client location
- > Completion session with results from a re-deployment of the Team Diagnostic™. Review what the team has learned; celebrate success; plan next steps. One-half day.

The project pricing does not include travel and related travel expenses.

Proposed pricing for this engagement: \$xx,xxx

## ***Timeline***

Describes the timing for key events, either in general terms (Week 1; Week 2; etc.) or with specific proposed dates if you have a clear idea of the client's schedule.

### ***In Summary***

A final paragraph that summarizes the need, your solution, and the benefit of taking this initiative and taking it now.

End with a warm close and an action step for the client.

### ***A Final (Marketing) Word***

You might call this last section, “Our Experience”, or “Client Reference” if you include reference clients or client testimonials. This is your last chance to reinforce your experience and expertise. You do need to keep it short — or it won’t be read at all.

This gives you one structure for a proposal. As we said there are many. *There is a Sample Proposal in the Digital Library you can download and adapt.*