

Sample Business Proposal

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When I was in the business world I routinely asked anyone who wanted to sell me a service to “put it in a proposal.” This is a standard business procedure which can be a bit of a challenge and even scary. If you want to be a business-to-business coach, you must do it. The good news is that submitting a proposal does not happen as a “cold sale;” rather, it typically occurs after introductions have been made and you know the person with whom you are dealing.

Proposals can be formal and full of a lot of “boilerplate” information about your company, your coaching style, quotes from people about your coaching, etc. Or, they can be informal and housed in a quick email. I opt for something in between. My proposals are letter style, sent as an attachment to an email, and generally in PDF format. If it is my first proposal to the company, I include fairly detailed information about the program I am proposing, e-brochures, and pricing expressed as “your investment.” When I do additional work with a company, I typically do not send attachments they already have. Rather, I offer to provide any additional information they desire. The proposal always ends with a note of thanks and a clear expression of my desire to work with the candidate. Here is an example of a typical proposal:

Place your company name in the upper left of the document letterhead, and contact information including address, phone number, email, and website in the upper right corner.

Date

Name and title of addressee

Full address

Dear (first name, depending on relationship):

Thank you for the opportunity to provide a proposal for coaching a member of your executive team. My program, , is a comprehensive 6-month program consisting of the following integrated elements:

- An initial meeting with you and/or the individual's reporting senior to agree on coaching outcomes
- A formal 360 degree evaluation
- One-on-one coaching, weekly
- An Energy Leadership Index® assessment at the beginning and at the end of the engagement
- Online written completion of all elements of the iPEC CORE Leadership Dynamics® Program (See attachment for a complete description of this program.)
- Private, online journaling if desired
- Full access to the online iPEC CarryOn Campus for the duration of the coaching engagement and three months thereafter
- A completion certificate suitable for framing and formal presentation to the executive upon completion of the program

Your Investment

Your company's investment for this program is as follows:

| | |
|------------------------------------------------------------------------------------------------------------|----|
| One-on-one coaching for 6 months, with written progress reports to (?) at the midpoint and end of coaching | \$ |
| 360 degree assessment | \$ |
| Two Energy Leadership Index® assessments | \$ |
| How Do You Help Them? | \$ |

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| 24-hour virtual Carry-on Campus website for the duration of this program and 3 months thereafter, for a total of 9 months. Includes unlimited SCOPE® Assessments, interactive journaling and electronic access to . . . | \$ |
| Total: | \$ |

Payment terms:

1. 1st payment, upon acceptance of proposal: \$ (All costs that I pay up front)
2. 2nd half-way through program: \$ (½ of balance)
3. Final payment, end of program: \$ (Balance)

I am excited at the prospect of working with your executive. Thank you very much for the opportunity to provide this proposal.

Sincerely,
(name)

Credit: The concepts inherent in this article are the author's interpretation of materials issued by iPEC®.