



Team Coaching:

Proposal Creation Tool

Introduction: The Imperative for Effective Team Coaching

A Team Coaching proposal should be written to formally present your services to an organization you wish to partner with. Before writing your proposal, ensure you have met with the organization's decision-makers and determined the following:

1. Identify the Need or Problem:

Clearly understand the needs, challenges and expectations of your prospective clients.

2. Outline a Detailed Plan:

Include steps, timelines, and resources required for implementation.

3. Determine the Investment:

Present the investment associated with your proposal.

Now that you have a clear understanding of the organization's needs, and program you plan to present, you can craft a compelling proposal. We recommend referring to the Case Study for guidance in building your ideas and incorporating successful examples of Team Coaching implementation within organizations. [You can access this valuable resource by clicking here.](#)

You can use the worksheet below to outline your proposal in the text boxes provided. When complete, transfer the information to a branded PDF with compelling images before submitting to the organization.

1. Cover Page

- **Title:** "Team Coaching Proposal for [Enterprise Name]"
- **Subtitle:** "Empowering Teams for Success"
- **Date:** [Proposal Date]
- **Prepared by:** [Your Name/Company]
- **Contact Information:** Email, Phone Number, Website

2. Understanding the Organization's Needs

- **Define the Purpose of the Organization:** Demonstrate your understanding of the organization by defining what they do and who they help.
- **Current Situation:** Summarize the current state of the organization's challenges based on your discussions or research.
- **Purpose and Goals:** Outline the organization's specific goals for team development and how team coaching can help achieve them.

Detail your understanding of the organization you are coaching, their challenges and goals here:

3. Why Your Company?

- **Introduction:** Provide a brief overview of your coaching company and your areas of specialization.
- **Value of Team Coaching:** Emphasize the value of team coaching specifically and results you've helped clients achieve.
- **Client Success Stories:** Provide testimonials or case studies from previous clients to build credibility.
- **Benefits:** Highlight the key benefits for your prospective client, such as improved team performance, better communication with key stakeholders and enhanced problem-solving skills. *(Feel free to reference Case Study: [Beyond Team Dynamics: The Rise of Systemic Team Coaching in a Complex Business World to build the value of team coaching](#)).*

Detail your company's unique value proposition, relevant experience, and the specific benefits you can offer to this organization here:

4. Proposed Solution

- **Coaching Program Overview:** Describe the structure and components of your team coaching program.
- **Methodology:** Explain the coaching methodologies and frameworks you will use.
- **Customizable Approach:** Highlight how the program can be tailored to the specific needs of the enterprise.
- **Program Phases:** Break down the program into phases (e.g., Assessment, Stakeholder Interviews, Team Coaching Sessions, Evaluation).

The following table provides an outline of a typical team coaching journey. The inputs at each stage may vary.

STAGE	MAIN ACTIVITIES	APPROX. TIME NEEDED	NOTES <small>**IF WORKING IN PAIRS YOU NEED TO BUILD IN DOUBLE TIME</small>
Scoping and Agreement	Scoping meeting with team Leader, Sponsor, other Key people, if appropriate.	1-2 days **	Usually not included in the fee charged to client.
	Write proposal	1 day	
Inquiry and Discovery	1-2-1 interview all team members and Team Leader	2 days#	#Depends on the size of the team and the complexity of the organization which will influence the number of stakeholders.
	1-2-1 interview key stakeholders	2 days #	
	HVTQ		
	Analysis of project design the first workshop.	2 days**	

Detail your proposed coaching solution, including program structure, methodologies, customization options, and program phases here:

5. Program Details

- **Duration:** Specify the length of the program (e.g., 6 months, 1 year).
- **Frequency:** Detail the frequency of coaching sessions (e.g., weekly, bi-weekly).
- **Format:** Describe the format of sessions (e.g., in-person, virtual).

Outline your program details and duration here:

6. Your Coaching Team

- **Your Company's Coaches' Profiles:** Provide bios of the coaches who will be involved, highlighting their experience and expertise.
- **Roles and Responsibilities:** Outline the roles and responsibilities of each coach.

Detail the profiles of your coaching team members, their relevant experience, and their specific roles and responsibilities for this engagement here:

7. Measurement and Evaluation

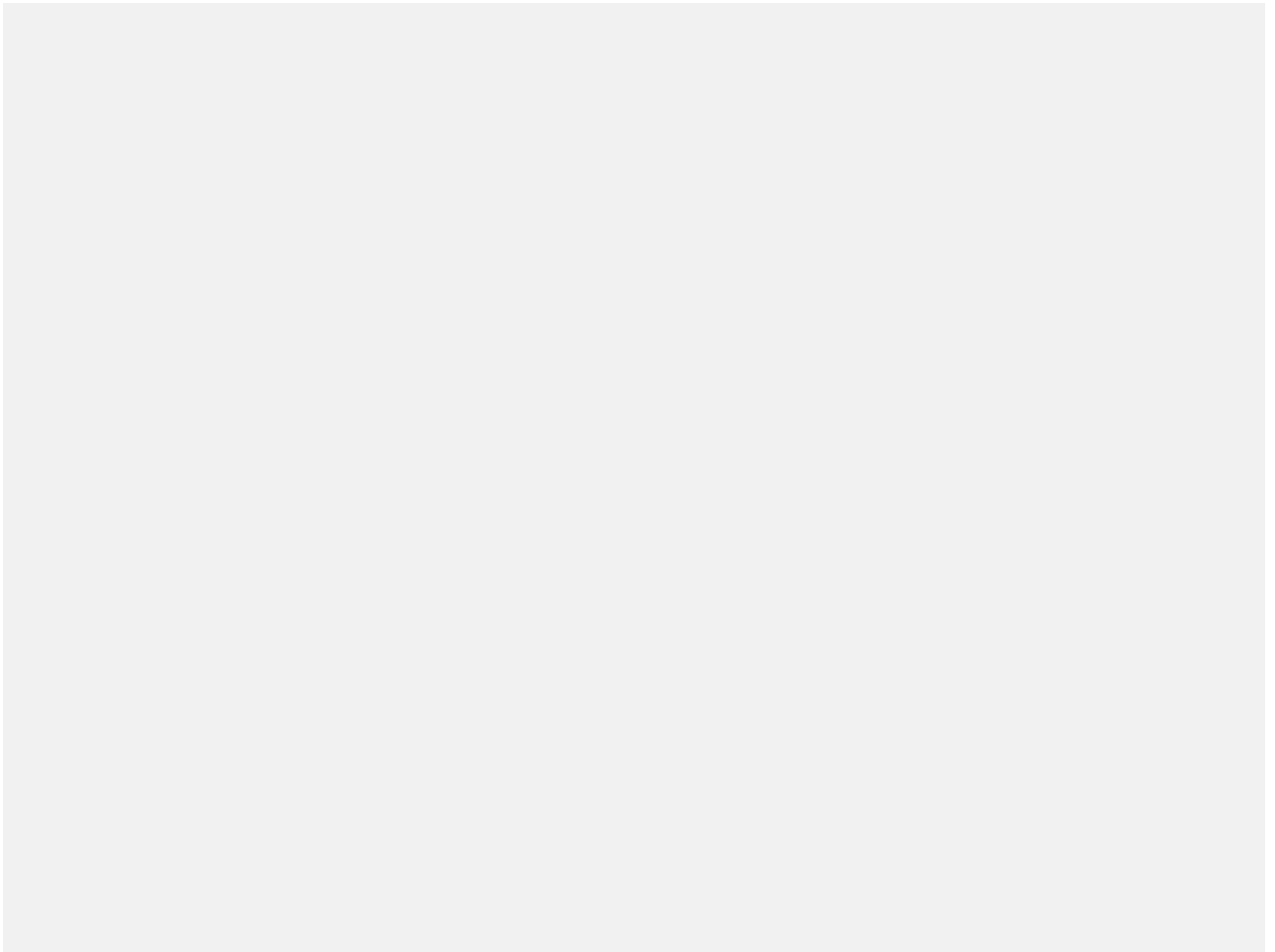
- **KPIs:** Identify key performance indicators to measure the success of the coaching program.
- **Evaluation Methods:** Explain how you will evaluate progress and outcomes (e.g., surveys, feedback sessions).
- **Reporting:** Describe the reporting process and frequency of progress updates to the enterprise.

Detail your approach to measuring and evaluating the coaching program's success, including specific KPIs, evaluation methods, and reporting processes here:

8. Investment

- **Offer Breakdown:** Provide a detailed breakdown of the offer associated with your program.
- **Payment Terms:** Outline payment terms.

Detail your program's investment structure, including a comprehensive breakdown of costs and proposed payment terms here:



9. Conclusion

- **Recap:** Summarize the key points of the proposal.
- **Call to Action:** Please provide the name, email, and phone number of the primary contact at your company for purchase inquiries.