



## T1 Proposal Template

**Goal: To provide a simple yet effective format for Leadership Team proposals.**

Type 1 proposals should be cross-functional, meaningful, and significant to the company's strategic execution (i.e., [Type 1 decisions](#)). A best practice is for proposals to be made in writing using complete sentences (not bullet points) and to be read together by the team. A complete proposal should be up to 6 pages, not including the supporting data (see Appendix below).

### 1. What is the situation, problem, or opportunity?

**Include summary data as appropriate in this section and add the full data set in the Appendix.**

*Example: There's an opportunity to serve a larger, enterprise client base. We've received 10 inbound leads from enterprise-level clients (\$200M+ in sales) in the past quarter but have only closed 1. If we can reposition our methodology and pricing, then we can capture a large percentage of these clients.*

### 2. What is the ideal outcome and how would we measure success?

**Don't describe the solution here. Describe the outcome or desired future state you want to achieve and how you would measure success.**

*Example: An ideal outcome is that we have 10 larger enterprise clients this year, double our sales, and increase our gross margin by 20%. We would also measure enterprise client success by tracking their growth in revenue year-over-year from using our program and expect to drive a 15% increase in their sales.*

### 3. Are there any obstacles to achieving this ideal outcome?

**Consider both internal obstacles (e.g., resources, culture, staffing, conflicting priorities, etc.) and external obstacles (e.g., clients, competition, environment, etc.).**

*Example: One internal obstacle is that our current proposal template speaks to a smaller client. Our pricing is also too low to accommodate larger, enterprise clients. External obstacles include the fact that larger firms want exclusivity and pedigree. Historically we've been more open about our results and experience than the education credentials of our consultants.*

### 4. What is your best proposed solution?

**Don't give options here; give your best recommended solution. Include your expected short- and long-range results, as well as how you would test your solution early in the process and make adjustments as required. Be specific.**

*Example: My proposed solution is to change our implementation methodology into three phases (Discovery, Implementation, and Optimization). The details of each phase and pricing methodology are shown in the new proposed contract (see Appendix). We would test this solution by selling to the next 5 enterprise prospects with this new format and expect to close 2 out of the next 5 enterprise prospects with a 30% price increase over our historic rates. If we're unable to demonstrate this close ratio, then we will test out selling our Discovery program at cost to get clients to "bite" and then upsell the full program using the same methodology.*

### 5. Appendix

**Include the sample press release and FAQ, financial proformas, budget needs, or other materials to support your best proposed solution.**