

# The proposal user journey

*The Proposal Builder App streamlines proposal management by enabling users to create proposals, generate detailed estimations using templates with pre-defined effort values, and track changes through estimation versioning. With features like recalculating totals and maintaining accuracy, the app ensures a seamless and efficient workflow from proposal creation to submission.*



## INITIATE PROPOSAL

This is the starting phase where the proposal is created and key details such as the customer, project scope, and milestones are defined, setting the foundation for the process.



## DOCUMENTS REVIEW

In this phase, relevant documents are gathered, analyzed, and attached to the proposal (e.g. documents), ensuring all necessary information is available for further evaluation.



## PROVIDE ESTIMATES

Here, estimations are created using templates that include predefined effort values, allowing for accurate calculations of costs and timelines for the proposal.



## INTERNAL REVIEW

This phase involves reviewing the proposal and estimations internally to ensure they meet quality standards and align with the customer's requirements before submission.



## SUBMISSION

The final phase where the completed proposal, including all documents and estimations, is sent to the customer for their review and decision.