Technology Proposal Template

When the global economy shifts, many prospects and customers focus on capital preservation, so closing deals and delivering accurate forecasts becomes far more challenging. For your proposal to take priority over other projects or to stand out amongst your competitors' proposals, they need to resonate with senior stakeholders across the business.

The External Factors section of this tool (including Business Drivers and Competitive Environment) will help you learn what information to look for, where to find it, and when to use these insights to drive conversations with senior stakeholders and decision makers to expand deal size and build robust proposals to accelerate project lead-times. It's always a good idea to organise a pre-proposal review, if possible, to gauge customer response and allow time to refine your proposal.

A pre-proposal presentation may take 60-90 minutes and include the following:

1. Project Summary (business drivers)
2. Challenges (i.e., productivity, security & compliance, information management. Be specific!)
3. Current Situation (use customer information and any insight you've obtained from your research)
4. Solution Overview (use images to impart information)
5. Project Approach/Risks
6. Business Outcomes
7. Project Investment
8. Timeline

A solid proposal includes the following:

1. Cover Letter
2. Executive Summary (half page summary and the most important part of any proposal)
3. Why Now? (Use the information the customer team has provided and use their language)
4. Business & Project Drivers
5. Key Operational Challenges
6. INDUSTRY/SPECIALISATION Solution Recommendation
7. Rapid Implementation Approach
8. Business Case Study
9. Business Costs
10. About Us (provide evidence that establishes your organisation as an industry expert)
11. Acceptance

EXAMPLES

Executive Summary

- (CUSTOMER) has been working with (PARTNER) to address (CHALLENGES) within (BUSINESS FUNCTION)

- We understand the overall project objective is (STATE OBJECTIVE), which supports (STATE DESIRED **OPERATIONAL** IMPROVEMENTS)

- The current business challenges result in (REPEAT WHAT THEY'VE TOLD YOU ABOUT THE IMPACT THESE CHALLENGES HAVE HAD ACROSS THE BUSINESS RESULTING IN RESTRICTED GROWTH AND/OR PROFITABILITY)

- By addressing (OPERATIONAL CHALLENGES) we believe strongly that (CUSTOMER) can (STATE DESIRED **BUSINESS** OUTCOMES)

- To capture these benefits, (PARTNER) recommends implementing (SOLUTION) for (FUNCTION), which is (STATE ANY SPECIFIC CONFIGURATION REQUIREMENTS)

- To accomplish (CUSTOMER) goal of going live with the new system by (GO-LIVE DATE) an initial investment of (£…….) is required for (I.E. SOLUTION CONFIGURATION, DATA MIGRATION, TRAINING). Based on (CUSTOMER)'s current employee configuration ongoing subscription fees, which include all future upgrades and application support, will be (£…….) per month.

- As a leading business solution provider to the (INDUSTRY), (PARTNER) has developed (INSERT ANY ADD-ONS THAT EXTEND THE CORE SKU) to address the unique needs of companies in this sector.

- (PARTNER) has serviced (INDUSTRY) organisations since its founding in (FOUNDING YEAR) and we are recognised as a (INSERT DESIGNATION IF YOU ARE A MSFT PARTNER).

You may want to offer a staged implementation and investment plan. Here's a Microsoft partner example:

Investment Options

Better Teamwork

Complete set of secure remote work and collaboration tools that include Microsoft Teams, secure cloud storage, business email, and premium Microsoft Office applications across devices.

Includes

- Desktop, web and mobile versions of Office 365 applications
- Device Management
- Classification and encryption of documents
- Support

New Capabilities

- Streamlined collaboration and communication
- Files stored securely in the cloud with access from anywhere
- Manage user data and devices easily from a single console
- Data protected from malicious software, viruses, and spyware
- Security updates, license management, external monitoring

$/€

Advanced Security & Control

All the capabilities of **Better Teamwork** plus business process automation, advanced cyberthreat protection and device management.

Includes

Better Teamwork plus:
- GDPR/PII archiving
- Identification and monitoring
- Advanced threat detection & security training
- Advanced authorization management
- Real-time monitoring and cyberattack remediation.
- Data loss and enhanced information protection
- Easily streamline work by creating advanced apps and forms (Power Apps)
- Priority helpdesk support (SLA)

New Capabilities

- View documents, files and communications easily through social intranets (SharePoint)
- Streamline work by easily creating advanced apps and forms (Power Apps)
- Control who accesses devices, programs, files and data

$/€

Accelerate Productivity

All the capabilities and benefits of **Better Teamwork** and **Security & Control** plus business intelligence, processes automation tools, and an enterprise-grade phone system with built-in audio conferencing.

Includes

Better Teamwork and Security & Control plus:
- Data analysis tools
- Automatic document classification and encryption
- Cloud phone system (Microsoft Business Voice)

New Capabilities

- Advanced
- Easy to use decision support tools (Power BI)
- Make, receive, and transfer calls to and from landlines and mobile phones on the public switched telephone network (PSTN) from within Microsoft Teams.
- 24 x 7 support

$/€