Acme

Acme Eye

Document Plan for Building Proposals with Acme Eye

RELEASE 2.0

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# Document Plan Purpose

This *Document Plan for Building Proposals with Acme Eye* defines the strategy for updating documentation for Acme Eye release 2.0. The document plan allows Acme staff to plan, create, and deliver documentation that aligns with Acme business goals.

This document plan is addressed to Product Management and Product Development staff within Acme. It informs them about documentation efforts that will be undertaken for this release. Its purpose is to secure their support and commitment to:

1. Provide information during documentation development
2. Review and approve drafts and final documentation

# 1.0 Target Audience

The target audience for this guide is Acme Sales Associates who work on proposals. Acme Sales Associates are on the front line of our business. They serve as the face of our business. Their responsibilities include meeting with customers, educating customers about products and services, and promoting the business. They send proposals to customers and email offers to prospective customers. Sales Associates spend a lot of time preparing and sending proposals and other documents, such as cover letters. And the challenge they face is this may affect their time available to meet with customers to sell Acme products and services.

It is assumed that the readers of this document are familiar with Microsoft Word and Acme products. Sales Associates have a basic knowledge of Microsoft Word, which is useful for using Building Proposals with Acme Eye. Their goal is to sell Acme products. Having product knowledge is useful for using the guide. The Sales Associates will not need motivation to use this guide because it is part of Acme Sales Training.

A brief survey of Sales Associates who tested a beta version of Acme Eye software using existing documentation indicated challenges. The list of challenges and our proposed solution to those challenges is shown in Table 1-1.

**Table 1-1: Sales Associates Challenges & Proposed Solutions**

| **Sales Associates Challenges** | **Proposed Solutions** |
| --- | --- |
| Documentation includes complex manual instructions for configuring their web browser to use Acme Eye. | Acme staff will create a script that will run an executable file to easily configure their web browser to use Acme Eye. |
| Sales Associates did not know fields marked with asterisk (\*) were mandatory, did not complete fields, and could not build a document. | Acme staff will add a note in documentation:  **NOTE:** Acme Eye marks required fields with a red asterisk (\*). This means you must fill in the information in the fields marked with a red asterisk (\*) or you cannot move to the next screen. |
| After clicking **Build** and **Next**, to begin building their document, Sales Associates typed on the keyboard while a document build was in process, causing Acme Eye to stop building their document. | Acme staff will add a note in documentation:  **NOTE**: Do not attempt to multitask while the document builds. |
| Sales Associates checked all checkboxes for customer business issues under Executive Summary. | Acme staff will add a note in documentation:  **NOTE:** For the Executive Summary, you can only select a maximum of five customer business issues. More than five customer business issues is too much for the customer to read. |

# 2.0 What does Building Proposals with Acme Eye involve?

This Document Plan includes updating documentation for Acme Eye release 2.0. It covers updating the document: Building Proposals with Acme Eye.

Acme Eye is a proposal automation tool. It simplifies the process of building proposals. Acme Eye enables you to save time and increase sales. Preparing proposals is a time-consuming task. Using Acme Eye enables you to save 40% of your time because it automates repetitive tasks. It allows you to spend more time with customers and less time in the office. Thus, it boosts your odds of closing deals and bringing in more revenue.

Acme Eye is a Web-based tool that is easy to use. It enables you to create proposals and other client-focused documents that follow a common structure. You make selections that reflect the customer’s needs. The software uses those selections to create a client-centric, persuasive document in Microsoft Word.

Acme Sales Associates will use Acme Eye to perform the following tasks.

* Performing Windows tasks, word processing, managing files, and creating output.
* Building proactive proposals.
* Building cover letters.
* Building mock Request for Proposals.
* Responding to Requests for Proposals.

## 2.1 Milestones

The estimated milestones are shown in Table 2-1.

**Table 2-1: Milestones**

| **Milestone** | **Delivery Date** |
| --- | --- |
| Updated files to reviewers | November 11, 2019 |
| Initial review complete | November 18, 2019 |
| Revisions complete | November 25, 2019 |
| Review complete | December 2, 2019 |
| Release (GA) | December 5, 2019 |

## 2.2 Contacts

The contacts who need to know about the document plan and can provide information during development of documentation are shown in Table 2-2.

**Table 2-2: Contacts**

| **Group** | **Contact Name** | **Responsibilities** |
| --- | --- | --- |
| Product Management | Barry Allen | Review all documentation for consistency with product strategies. |
| Development | Brenda Starr | Review all documentation for technical accuracy and completeness. |
| Technical Writing | Lisa Fleischmann | Create, edit, and deliver all documentation. |

## 2.3 Document Format

Draft documentation is in Microsoft Word. Graphics are in JPG format. When the draft document is final, the technical writer converts the final document from Microsoft Word to PDF and posts to the Acme webpage: <https://sales.acme.com>.

## 2.4 Document Updates

The documentation is updated every quarter per Acme Eye software release. Document reviews are informal and are handled via email.

The review and approval process for updated documentation is described below:

1. Reviewers review new material that has been added to the documentation, and any changed material, and provide feedback.
2. Technical Writer completes revisions.
3. Technical Writer sends revised (final) version to approvers for signoff. These approvers are Product Manager and Development Manager.

# 3.0 Why does this guide need to be created?

This guide is part of Acme Sales Training. This update will include revisions to the text because the previous documentation was less than exemplary. It was complex. The updated documentation will be easier for Acme Sales Associates to consume. This updated guide will enable Acme Sales Associates to successfully use Acme Eye to create proposals and other documents. It will help achieve the goals of saving time and increasing sales.

# 4.0 Document Outline

The document: *Building Proposals with Acme Eye* consists of the following sections:

Why Use Acme Eye?

Step 1: Reviewing Prerequisites

Step 2: Installing Browser Setup Script & Logging In

Step 3: Creating a Project

Step 4: Completing Data Screens

Completing Acme Prime Data Screen

Completing Customer Data Screen

Step 5: Completing Selection Screens

Completing Executive Summary Selection Screen

Step 6: Building your Document