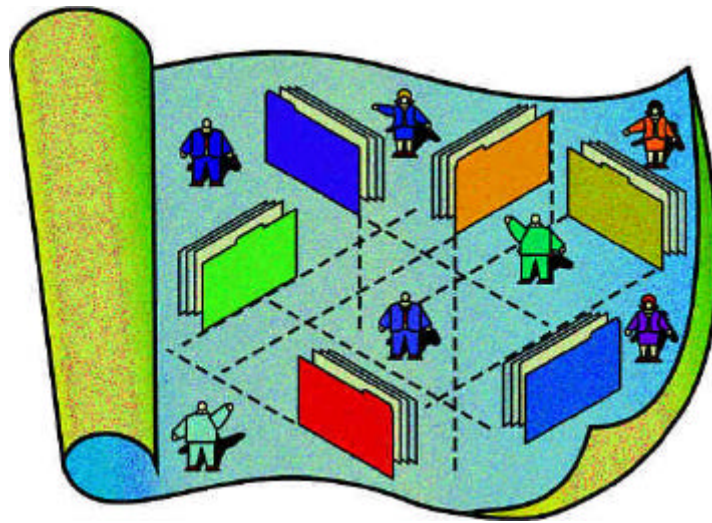# SALES PROPOSAL ARCHITECT ©

User Guide

Version 1.1

Sales Proposals.COM

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Introducing Sales Proposal Architect [©]

Welcome to SALES PROPOSAL ARCHITECT—a new approach for designing and writing winning, customer-focused sales proposals. This system will help you plan the direction and contents of your sales proposals. It also will help you decide what information to include in your proposals and how to present it. You will be able to concentrate your efforts on making sales and not have to worry about designing and writing proposals.

With SALES PROPOSAL ARCHITECT, you will design and write professional sales proposals that reflect win-win partnerships between you and your customers. SALES PROPOSAL ARCHITECT provides an interactive design dialogue to help you develop detailed proposals that are ready for your finishing touches. You also can find that working with the system will help you focus your information gathering activities during the sales process. Your proposals will become more customer-driven. The program uses the proposal structure and design guidelines from the book **Sales Proposals Kit for Dummies—**by Bob Kantin (Hungry Minds, Inc, 2001).

SALES PROPOSAL ARCHITECT'S intuitive, pull-down menus and Action Bar guides you through the process—every command you need is available on the screen. To assist you in making the right decisions, the system uses a Design Dialogue Box and on-screen Comments and Suggestions. At any time you can also preview the proposal you are designing. Finally, SALES PROPOSAL ARCHITECT provides a tutorial on each of the five recommended proposal sections to give you to further background in designing your strategic sales proposals.

Integrate Your Proposals and Sales Process

Writing winning sales proposals requires a consultative sales process and a willingness to form partnerships with your buyers—offer valid business solutions not sales solutions. SALES PROPOSAL ARCHITECT will help you design and write winning proposals by helping you formulate and present compelling reasons for buyers to make a change. It also will help you:

- Write customer-focused sales proposals.
- Differentiate your proposals from the competition.
- Increase your proposal close ratio.
- Possibly shorten your sales cycle.

Features

The SALES PROPOSAL ARCHITECT program includes the following features to help you design and write winning sales proposals:

- Comprehensive **design dialogues** for the five recommended proposal sections and the Title Page.
- An **Action Bar** on the left side of the screen that allows you to move between the proposal sections to complete design items and preview the proposal and display a list of all design items.
- **Comments and Suggestions** that display examples and offer proposal design expertise.
- **Tool Bar** buttons access program functions at the click of a mouse.
- Automatic generation of a formatted proposal and fully automated Table of Contents (a Microsoft™ Word function).

Working with Output

After you enter your responses to the design items presented in SALES PROPOSAL ARCHITECT, the system will generate a fully formatted proposal—a 10–12+ page Microsoft™ Word document. This document will include a Title Page, Table of Contents, Executive Summary, the five main proposal sections, and a page listing the appendices you decided to include in the final proposal.

Depending upon how you responded to the design items, you can expect your proposal to be 80–90% complete. However, before you send the proposal to your customer, you will need to thoroughly review and edit it. You will need to:

- Add descriptive paragraphs and expand the level of detail contained in some sections and subsections.
- Add graphics to enhance readability.
- Develop financial benefits calculations.
- Write an Executive Summary using the contents of the five completed sections as the basis for its development.

Developing Proposal Models

After using SALES PROPOSAL ARCHITECT several times, you might find that you have developed several "proposal models" or "proposal templates" for your company. You also might find that your proposals follow the 80/20 rule—80% of each proposal contains wording common to all proposals while the remaining 20% contain customer-specific information. If this is the case, you have two options:

Option 1: Develop and save proposal models in SALES PROPOSAL ARCHITECT by only completing those design items that contain the wording common to all proposals. To create a custom proposal, open the appropriate proposal model and complete the design items left blank, the ones that require customer-specific information. Next, generate the proposal in Microsoft Word and add your finishing touches.

Option 2: Use SALES PROPOSAL ARCHITECT to begin the proposal model development process. Open a new proposal and complete all the design items including those that require customer-specific information. Then generate the proposal in Microsoft™ Word and save it as a proposal model. To create a custom proposal, open the Word document and change those areas that contain customer-specific information.

If your proposal models contain many graphics and/or follow a different page layout significantly different than the one generated using SALES PROPOSAL ARCHITECT, you might find it is easier to modify an existing Microsoft Word proposal model. However, you might want to use the system's interactive design items to guide development of all your proposals.

Finding Help

SALES PROPOSAL ARCHITECT includes extensive expertise and help accessible from the **Help Menu** and from most locations in the program.

If you need help with the proposal's content, check the system's **Comments and Suggestions** for the design item. Access this information by clicking the button located in the bottom right corner of your screen. See Figure 1 on the next page.

If you need more help completing design items or would like more detailed examples, you can find the appropriate subject or proposal section in the book **Sales Proposals Kit for Dummies**—by Bob Kantin (Hungry Minds, Inc, 2001). You can purchase it at most bookstores or over the Internet at www.salesproposals.com.

Customer Support

For customer support go to www.salesproposals.com.

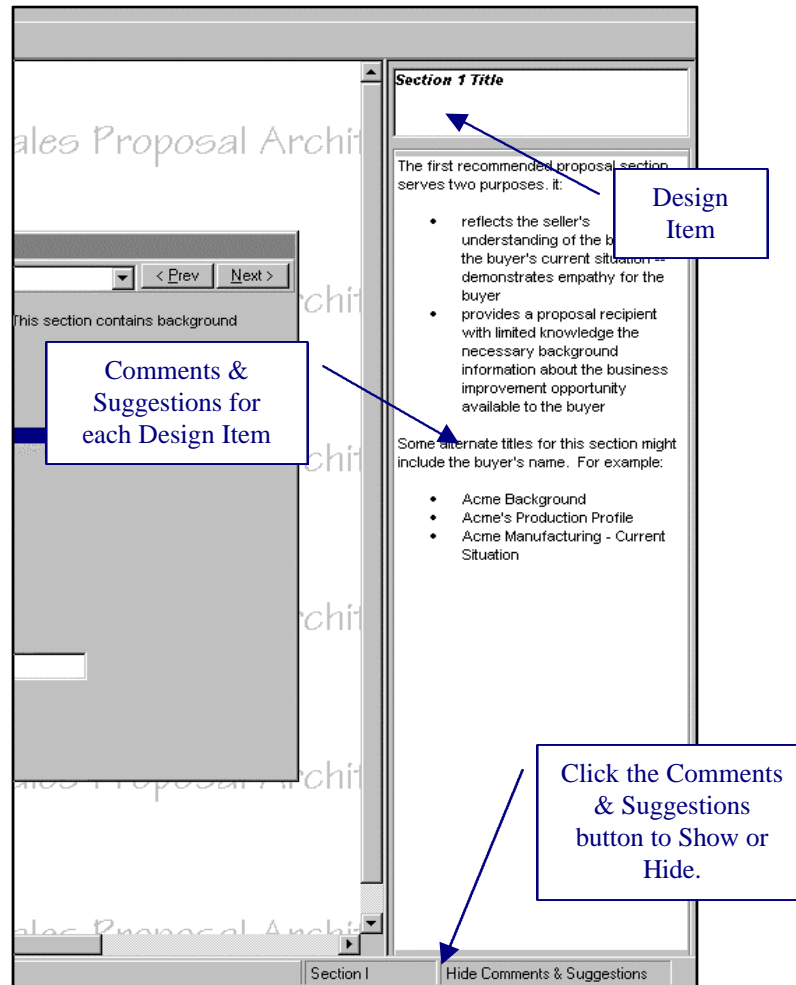## Proposal Content Help: Comments and Suggestions

Figure 1. Comments and Suggestions for each question

Getting Started

The Program Package

The SALES PROPOSAL ARCHITECT program package contains the following:

- SALES PROPOSAL ARCHITECT User's Guide
- CD-ROM

Minimum System Requirements

To install and operate SALES PROPOSAL ARCHITECT, you need:

- A personal computer running Microsoft Windows 95 or higher
- Microsoft Word 6.0 or higher
- A printer supported by Windows 95 or higher
- Seven (7) megabytes of hard disk space

Installing the Program

Before installing SALES PROPOSAL ARCHITECT, register your copy of SALES PROPOSAL ARCHITECT. If you purchased the program directly from SalesProposals.com, you were automatically registered. When you register, you will receive product update notices and new product announcements.

Follow the steps below to install SALES PROPOSAL ARCHITECT. You cannot simply copy the files to your hard drive. You must follow the setup procedure.

To set up the program:

1. Turn on you computer and start Microsoft Windows.
2. Select **Start Menu** and choose **Run**. The Run Dialogue box appears.
3. Insert the CD-ROM into the drive (D: or E:).
4. Type **D:SETUP** or **E:SETUP** in the **Open:** Line field and click OK.
5. The setup program creates a **SALES PROPOSAL ARCHITECT** subdirectory in **C:\Program Files** on your hard drive, unless you choose otherwise, and places all the programs in the subdirectory.

Starting the Program

To start SALES PROPOSAL ARCHITECT:

1. Start your computer and Microsoft Windows.
2. Click **Start** on the Windows Status Bar, then click **Programs,** and then click **SALES PROPOSAL ARCHITECT**, or
3. Double click on the **SALES PROPOSAL ARCHITECT** icon on your desktop to start the system.

Opening a New or Existing Proposal

When you start SALES PROPOSAL ARCHITECT the Open proposal dialogue box appears (see Figure 2). Use the tabs at the top of the screen to complete one of three actions:

- **Recent** Select a recently created or edited proposal (Figure 2).

- **Browse** Select a hard or floppy drive and directory or subdirectory to open an existing proposal (Figure 3).

- **New Proposal** Create a new proposal; the system will display a New proposal dialogue box that asks you to enter a name for the new proposal file.

  Note: Placing the cursor on each file listed on this screen will display the entire path name.
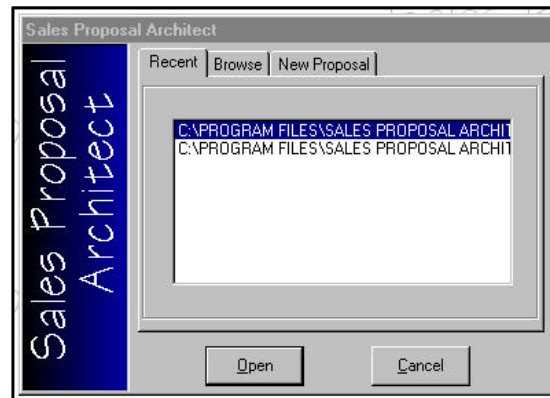

Figure 2. Open recent proposal
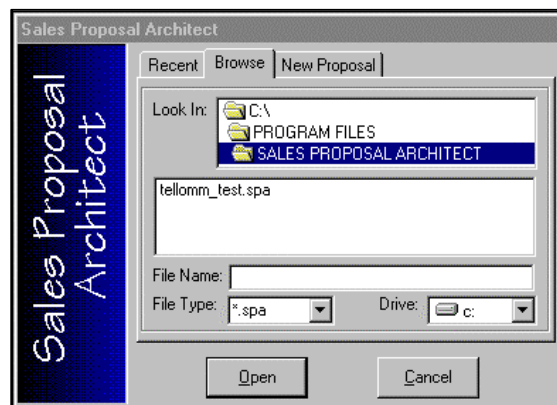
Figure 3. Open existing proposal

Main Screen Layout

SALES PROPOSAL ARCHITECT provides a simple-to-use screen layout that makes it easy for you to design a winning proposal. This screen has two main components:

- **Design Dialogue Box**
- **Action Bar**: allows you to move between proposal sections to complete design items and preview the proposal. **Note**: The "*Green Man*" icons define two things, the current:

  − action (view Design Items, Preview Section, or View Item List)

  − section (1–5 or the Title Page).

You also can access two other components from the main screen:

- **Comments and Suggestions**: design expertise for each item.
- **Design Item List:** view all the proposal design item names and actual design items by clicking the **View Design Item List** button on the **Action Bar**.

Figure 4. Main Screen with the Design Dialogue Box

Locating Options

Once you start SALES PROPOSAL ARCHITECT, the **Menu Bar** offers the following options:
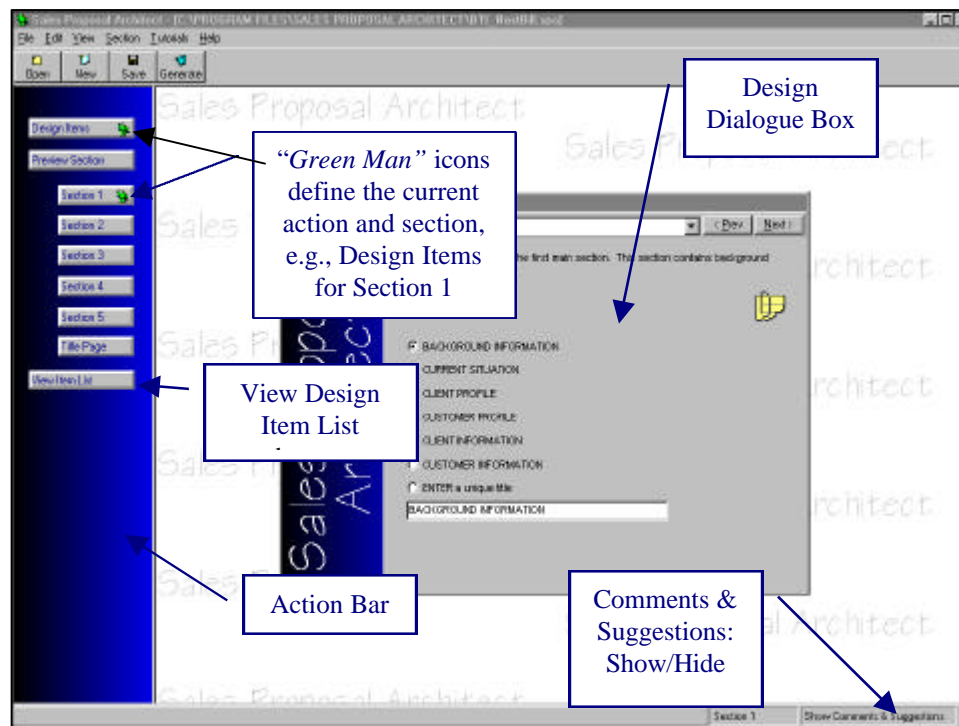
- **File** - new, open, save, save as, generate (a proposal) document, or exit the program
- **Edit** - copy text to the Windows Clipboard, and paste text from the Clipboard into a proposal; select preferences (change the display font)
- **View** - go to the design items or preview the proposal section or the Title Page selected on the Action Bar; view the Comments and Suggestions or the Design Item List
- **Section** - go to one of the five proposal sections or the Title Page
- **Tutorials** - go to a tutorial for the one of the five proposal sections
- **Help** - access program Help, instructions on using on-line Help, system information, and other important information

After you make a selection from the **Main Menu**, a sub-menu might open allowing you to make additional selections. You can select Main Menu and sub-menu options using a keyboard or mouse.

Selecting Items and Executing Commands

SALES PROPOSAL ARCHITECT uses typical keyboard and mouse commands found in Windows-based systems.

When the *User Guide* tells you to "select" an item, either a menu item or a list item, you use one of the following methods:

- Position the mouse pointer on the option and click.
- Use a **Tab Key** to highlight an item of your choice and press **Enter.**
- Press **Alt** plus the option's underlined "**pick letter**".
- Press only the option's underlined "**pick letter**" (this applies to the Menu Bar options when the Menu Bar is active or to sub-menu options when the sub-menu is pulled down)

You will use command buttons to choose other program features. Command buttons perform actions and open windows to additional program features. They look like buttons on an electronic device. Instead of pressing the button, you execute the button by clicking on the button and pressing one or two associated keys (Alt key plus the button's highlighted pick letter).

Tool Bar Buttons

The SALES PROPOSAL ARCHITECT **Tool Bar** is located below the **Menu Bar**. Use the Tool Bar to access frequently used functions by clicking on the buttons rather then selecting the options from the menus.

Open File: Open an existing SALES PROPOSAL ARCHITECT file. The file will have '.spa' extension, e.g., acme.spa.

New Proposal: Create a new proposal.

Save Current File: The system saves the current file in the subdirectory where you installed SALES PROPOSAL ARCHITECT. You might elect to save your file to another subdirectory by using the 'Save As' command.

Generate MS Word Document: Create a document in Microsoft Word using the current proposal file. This file will be named the same as your proposal file except with a '.doc' extension.

Exiting the Program

When you finish using SALES PROPOSAL ARCHITECT, exit the program by selecting **Exit** from the **File Menu** or by clicking the **Close Button (X)** in the upper right corner of the program window. The system will automatically save your proposal if you have not already done so.

Quick Tour

This chapter introduces the basic features of SALES PROPOSAL ARCHITECT. It will guide you through the completion of several design items in Section 1: Background Information. Follow these procedures to begin designing and writing your first proposal.

This chapter shows you how to:

- Access the first of the five proposal sections or the Title Page.
- Access a section's design item list.
- Begin a new proposal and complete design items by selecting and entering information.
- Save and reopen a proposal.
- Verify, preview, and print a proposal.

The Five Proposal Sections

Bob Kantin's book **Sales Proposals Kit for Dummies** (Hungry Minds, Inc., 2001) identifies five main sections for a sales proposal:

1. Background Information
2. Proposed Solution
3. Implementation
4. Seller Profile
5. Business Issues

SALES PROPOSAL ARCHITECT groups proposal and content design items into these five sections. Within each section,7 the system presents design items to help you select section and subsection titles, define contents, and identify other custom sales proposal specifications.

To select one of the five sections from the **Action Bar** click one of the listed sections (**Section 1, Section 2**, etc.) buttons on the left side of the screen.

The **Title Page** button allows you to access design items that will help you design your proposal's Title Page.

Using the Design Item Lists

You can display the available design items (Design Item List) for the current proposal section by clicking on the **drop-down arrow** of the Design Dialogue Box. The Design Item List appears at the top of the Design Dialogue Box (see Figure 5). To move to any of the displayed design items, **highlight the design item** and double click.
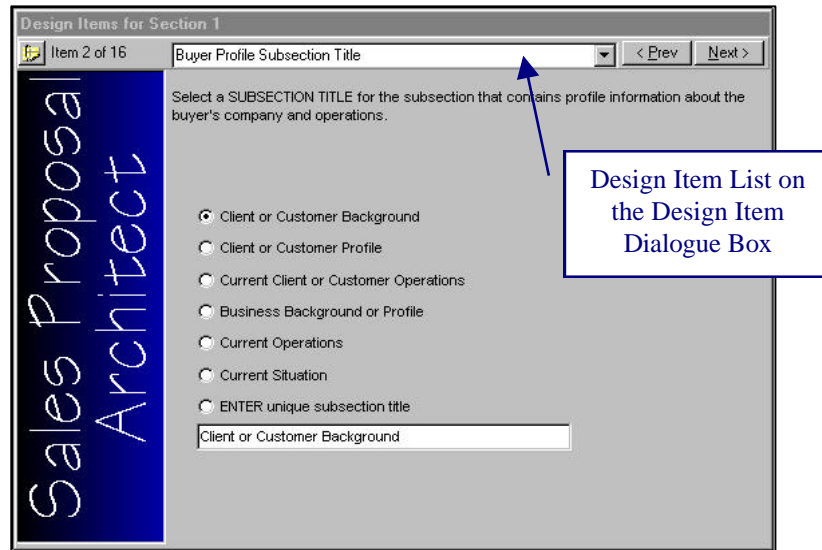
Figure 5. Design Item Dialogue Box

You can display all SALES PROPOSAL ARCHITECT design items by clicking the **View Design Item List** button on the **Action Bar**. The **Design Item List** box displays the design item names of all the design items for each section and the Title Page. You can view the design items by using the **Up** and **Down Arrows** on the **Scroll Bar**. To go to the Design Dialogue Box for any design item:

1. Select the design item and

2. Click the **Go To Design Item** button on the Design Item List Box.

You can display the actual design items and their names by clicking the **Display Design Items** button on the Design Item List box. The system will display the design item name and the text for all design items. Use the **Up** and **Down Arrows** on the **Scroll Bar** to view the design items. See the Figure 6 on the next page.
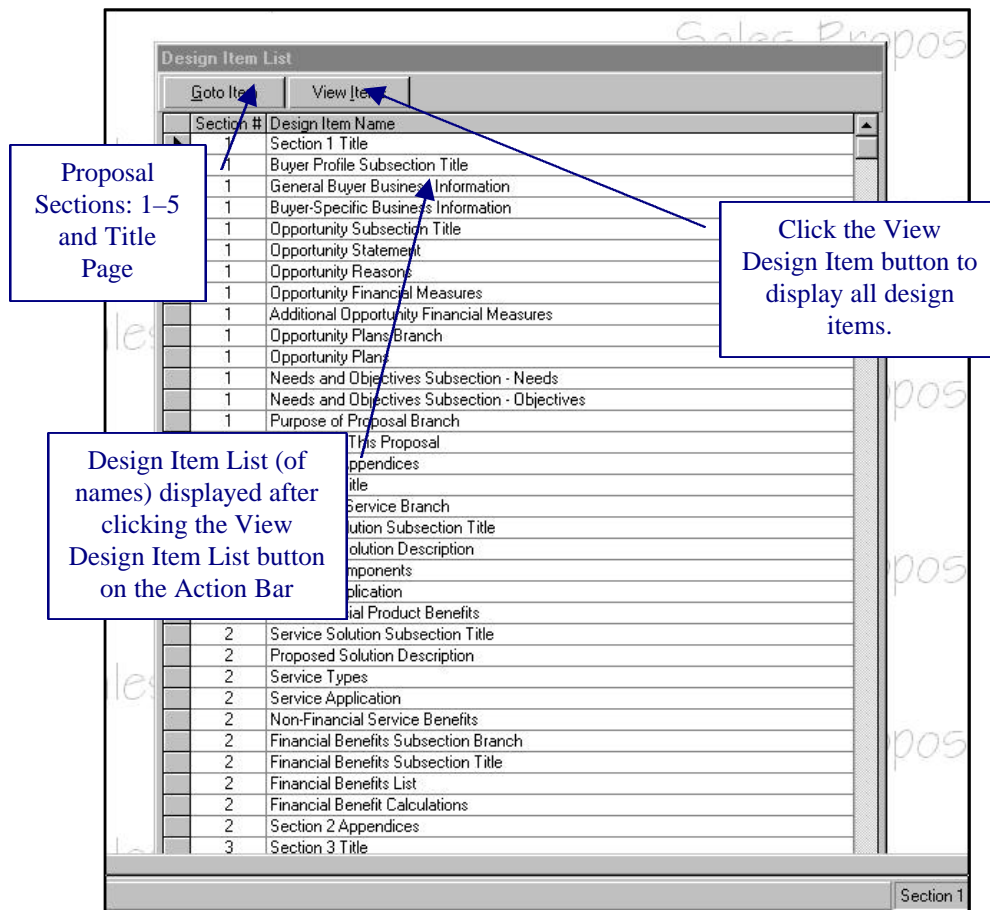
Figure 6. Design Item List

Beginning a Proposal

For the purposes of this quick tour, assume that you are selling bar-code readers and software to retail stores. You want to write a sales proposal for Star Hardware, a chain of hardware stores. You can start by:

1. Selecting **New** from the **File Menu**.

2. Naming your new proposal 'Star'

3. Clicking **OK** to open the new proposal.

Now let's complete the first three design items for Section 1:

1. Read the design item and select (click on the appropriate radio button) **"Customer Profile"** as the title for Section 1 and press the **Next >** Design Item button. This is a required design item, if you do not select one of the titles, the system will default to the first title listed.

2. The second design item asks you to select a title or input a custom title for the required customer background section. This time select (click on the appropriate radio button) **"ENTER unique subsection title"** and enter "Star Hardware Profile and Operations" in the input area below the selection. It is easy to enter unique information about your prospective buyer to custom design a sales proposal.

3.   The third design item asks you to select what type of general buyer business information you want to include. It also allows you to indicate your desire to add more buyer-specific business information. Select three or four categories of general business information that you feel would be appropriate.

4.   Next, preview your proposal by clicking the **Preview Section** button on the **Action Bar**.

Use **< Prev**(ious) and **Next >** buttons on the top of the Design Dialogue Box to move between design items in the current proposal section. To go to the next design item, click on the **Next >** design item button arrow on the Design Dialogue Box. Once you complete selecting or inputting for all the design items in a proposal section, go to the next section by clicking on the next section's button on the **Action Bar**. Remember to use the **Comments and Suggestions** to assist you with your responses.

Saving, Exiting, and Reopening the Proposal

Let's leave the program before you finish designing the proposal for Star Hardware. Follow these steps to save, close, and reopen a proposal.

1.   With the proposal open, select **Save** from the **File Menu**.

2.   Select **Exit** from the **File Menu** to close the system.

3.   To reopen the Star proposal, start SALES PROPOSAL ARCHITECT. Select the Star proposal in the Open Dialogue box, by highlighting **"star.spa"** and clicking **OK**.

4.   The Star proposal opens at the first design item of Section 1.

Previewing and Printing a Proposal

You can preview each proposal section before generating a proposal as a Microsoft Word document. Click the **Preview Section** button on the **Action Bar**. Preview each section by clicking the appropriate button on the **Action Bar**, e.g., **Section 1, Section 2,** etc. The system displays the proposal on your monitor. Use the **Up** and **Down Arrows** on the **Scroll Bar** to move back and forth in the current proposal section.

The Preview feature only provides a visual representation of the proposal as it will appear when printed. You can preview the current proposal at any time. **NOTE:** Some information displayed in tables might be truncated in preview mode. This information will display as entered in the generated proposal.
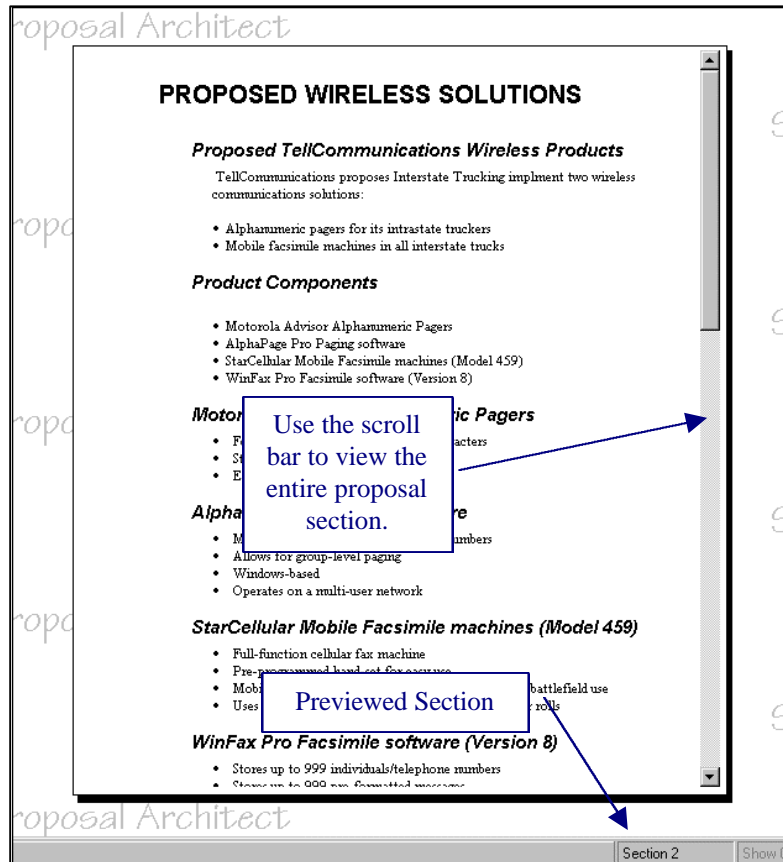
Figure 7. Preview Proposal Section

To print the proposal, either:

1. Select **Generate Document** on the File Menu, or

2. Click on the **Generate Word Document** button on the Tool Bar.

3. SALES PROPOSAL ARCHITECT opens Microsoft Word, generates the proposal, and saves it as a Word document in the location you specify. The Microsoft Word proposal is titled using the file name entered when you created the proposal, i.e., **"star.doc"**.

Creating a Sales Proposal

Use this chapter as your guide for producing a sales proposal. The instructions assume you are developing a complete proposal, Sections 1–5. However, you do not need to complete all the design items for each section at one time. Rather, you might want to complete the design items as you gather information and formulate your proposed solution during the sales process. In some situations, the design items might help you direct your consultative sales activities.

Before You Start

Before you generate a sales proposal, you might want to:

- Complete the SALES PROPOSAL ARCHITECT tutorials for each of the five proposal sections, or
- Read the appropriate chapters in Bob Kantin's book *Sales Proposals Kit for Dummies* (Hungry Minds, Inc., 2001).

The tutorials and book will help you understand how to complete the design items.

Creating a New Proposal

To start a new proposal, start SALES PROPOSAL ARCHITECT and click the **New** tab on the **Open Dialogue** box. If the system is running, select **New** from the **File Menu** or click the **New Proposal** button on the Tool Bar. The program creates a new proposal file and displays the first design item for Section 1.

Opening an Existing Proposal

After you save and close a SALES PROPOSAL ARCHITECT proposal, you can reopen it and make changes to your design items. To open an existing proposal:

1. Select **Open** from the **File Menu** or click on the **Open** button on the **Tool Bar**.
2. When the Open Dialogue box appears, highlight any proposal and click **OK** to open it.

NOTE: You can not have more than one proposal open at the same time.

Entering and Selecting Information

The cursor initially appears in the first radio button, checkbox, or blank input field of the active design item. The cursor indicates your location within the window.

You can select a radio button, checkbox, or input field by clicking on or tabbing to the item.

By default, the program will select the first radio button of a required design item if you do not select any of the radio buttons.

Some responses require you to input information. For example, you can enter a unique subsection title. You must first select the radio button for that option before the program will allow you to input information. If you unselect a radio button after entering the information, it remains in the event you change your mind but it is not used when you preview or print the proposal.

Enter information in a response field as you would in any other field. Some fields accept only numeric entries, for example, amount fields ($) and date fields (mm/dd/yy).

After responding to a design item, press the **Next >** design item button on the Design Dialogue Box to go to the next design item. Depending upon your responses to some design items, the program might direct you to one or a series of optional design items.

After you select your responses and enter information, you can always return to a previous design item in one of two ways, by:

1.   Selecting the appropriate design item from the Design Item List window, or

2.   Pressing the **< Prev**(ious) design item arrow.

Attaching a Note to a Design Item

As you select responses and enter information to design items, you might want to save additional information about your entries. With the Note feature, you can attach a note to a design item similar to writing a note in the margin of a document. See Figure 8 on the next page.

To attach a note to a design item:

1.   Click the **Note icon** in the upper left corner of the Design Dialogue Box.

2.   When the Note Dialogue Box opens, enter your note. If you want to erase the screen, highlight and delete the text.

3.   After finishing your note, click the **Note icon** to save it.

After you attach a note to a design item, the **Note icon** appears on the Design Dialogue Box. To display a note for the active design item, click either one of the two **Note icons** that appears on the Design Dialogue Box.
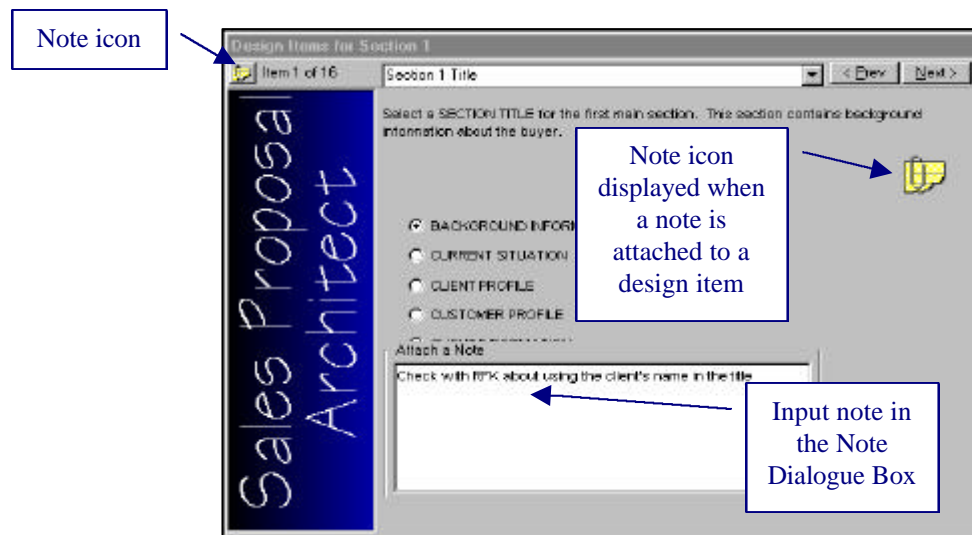
Figure 8. Adding a note to a design item

Editing Design Item Information

The options on the **Edit Menu** provide easy ways to modify your design item responses. The program provides the following edit options:

- **Cut:** clears the highlighted field(s) and copies it to the Windows Clipboard
- **Copy:** copies the highlighted field(s) to the Windows Clipboard
- **Paste:** inserts information on the Windows Clipboard to the current field.

Reordering Design Item Information

Some design items allow you to reorder your input. This SALES PROPOSAL ARCHITECT feature makes it easy to rearrange the order in which you want information presented in your proposal. For example, the "Product Components" design item allows you to enter up to ten components for your proposed product. If after listing the components you wanted to change their order, you simply need to:

1. Move the cursor to the line you want to move. The **Up Arrow** and **Down Arrow** buttons will appear on the right side of the line.

2. Click the **Up Arrow** or **Down Arrow** to reorder the line. Clicking the Up Arrow button once will move the line up one line. Clicking the Down Arrow button will move the line down one line.
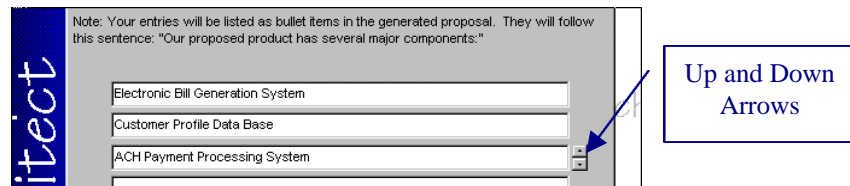

Figure 9. Reordering Design Item information

Saving a Proposal

A proposal file is created and saved to disk when you select the **New** tab on the **Open Dialogue** box and name the proposal. From then on, the file is saved as the name you gave it, with a '.spa' extension. The system automatically saves the changes you make each time you complete or alter a design item.

Saving a Proposal in Another File Format

To save a proposal in another file format, you first must generate the proposal as a Microsoft™ Word document. Then use Word to save the proposal in another format.

Previewing the Current Proposal Section

The system allows you to preview the current proposal section. This feature provides a visual representation of the proposal as it will appear when printed. You can preview the current proposal at any time.

NOTE: Some information displayed in preview mode, particularly in tables, might be truncated. This information will display correctly in the generated proposal.

To preview a proposal section:

1. Click the **Preview Section** button on the **Action Bar**.

2. The system displays a preview of the current proposal section. Use the **Up** and **Down Arrows** on the **Scroll Bar** to preview the section.

3. To preview another section, click the appropriate **Section** button on the **Action Bar**.

Generating and Printing a Proposal in Microsoft™ Word

To print a proposal, you first must generate it as a Microsoft™ Word document. Follow these steps:

1. Open the desired proposal.

2. Select **Generate Document** from the **File Menu** or click on **the Generate MS Word Document** icon on the Tool Bar.

3. The system generates the proposal as a Microsoft™ Word document and saves it in the location you specify. The Word document will have the same name as your proposal file except with a '.doc' extension. Open Word and print the proposal as you would any Word document.

Copying a Proposal

SALES PROPOSAL ARCHITECT allows you to copy any proposal. For example, you might want to use one proposal as a model for a similar selling opportunity.

To copy an existing proposal:

1. Open the proposal you wish to copy.

2. Select **Save As** from the **File Menu**.

3. Enter a new file name for the proposal and click **OK**.

4. The new proposal opens on the screen and you can change design item responses and information as needed.

Microsoft™ Word Styles

SALES PROPOSAL ARCHITECT uses the *Styles* functions in Microsoft Word to format the proposal. For example, responses to:

-   The five proposal **Section Title** design items generate **"Heading 1"** output.
-   **Subsection Title** design items generate **"Heading 2"** output.
-   Some design item generates **"Bullet"** output.
-   Some design items generate **"Table Text"** output, etc.

The standard SALES PROPOSAL ARCHITECT output provides an attractive, business document using commonly available fonts. To change a proposal's format use the *Styles* functions in Microsoft Word.

Automatic Table of Contents

SALES PROPOSAL ARCHITECT uses the *Index and Tables* functions in Microsoft™ Word to create a Table of Contents when the proposal is generated. **"Heading 1"** and **"Heading 2"** design item responses automatically generate **"TOC 1"** and **"TOC 2"** entries including page numbers for the Table of Contents.

Once the proposal is saved as a Word document, page additions (or deletions) to the proposal can be incorporated into the Table of Contents using the proper "Style" in the proposal body. To update the Table of Contents, click the *"Update Entire Page"* option on the *Update Table of Contents* Dialogue Box. See your Word users guide or help screens for more information.

Working with Microsoft™ Word

When you generate a proposal using SALES PROPOSAL ARCHITECT, the system saves it as a Microsoft™ Word document in the location you specify. Each time you generate another copy of a proposal, the system renames the latest copy. For example, the first generated proposal of **star.spa** will have a Word file name of **star.doc**. If you make changes to **star.spa** and generate another Word document, the system will rename the first copy **star.000**, the second copy **star.001**, etc. In this example, the most recent file will be named **star.doc.**

For best results, complete the proposal in SALES PROPOSAL ARCHITECT by responding to all the design items and previewing each section. Once you are satisfied with the proposal, create it as a Microsoft Word document by clicking the **Generate Document** icon on the toolbar or by selecting **Generate Document** on the **File Menu**. After the proposal is generated, open it in Word, make final changes and additions, and print it.

The Five Proposal Sections

The section buttons on the **Action Bar** allow you to create five (5) main proposal sections. Clicking on the **Design Items** button and one of the section buttons will take you to the design items for that section. Clicking on the **Preview Section** button and one of the section buttons will preview that section. The sixth button will help you design your proposal's Title Page.

The five proposal sections are:

1.   Background Information
2.   Proposed Solution
3.   Implementation
4.   Seller Profile
5.   Business Issues

Read the appropriate chapters in **Sales Proposals Kit for Dummies** (Hungry Minds, Inc., 2001) for more information.

Section 1: Background Information

The primary purpose for this first proposal section is to show the buyer that you understand their business. This section must:

- Describe the buyer's current situation.
- Define a business problem or opportunity facing the buyer.
- Identify the buyer's plans for fixing the problem or taking advantage of the opportunity.
- Define the buyer's needs and objectives.

Content Overview

Section 1 contains design items that create a proposal with the following subsections and topics:

BACKGROUND INFORMATION
Buyer Information (profile)
Improvement Opportunity
- Statement
- Causes
- Financial Measures
- Plans
Needs and Objectives
Purpose of This Proposal (optional)

Additionally, one design item allows you to identify any appendices you want to include in your proposal to support the contents of this section.

Preparing to Answer Section 1 Design Items

Many sales professionals develop a list of design items or a client questionnaire to help them better understand a customer's business. Understanding a customer's current situation is the first step in developing a buyer-seller partnership and writing a client-focused proposal.

Section 2: Proposed Solution

The second proposal section has two primary purposes:

- Describe the application of your proposed product or service and how it will work in the buyer's unique situation.
- Present the benefits the buyer will gain if they decide to purchase your product or service.

Content Overview

Section 2 contains design items that create a proposal section with the following subsections and topics:

PROPOSED SOLUTION (Proposed Product)

Description - Overview

Product Components

Application

Features and Benefits (non-financial benefits)

Financial Benefits

OR

PROPOSED SOLUTION (Proposed Service)

Description - Overview

Service Capabilities

Application

Capabilities and Benefits (non-financial benefits)

Financial Benefits

Additionally, one design item allows you to identify any appendices you want to include in your proposal to support the contents of this section.

Preparing to Answer Section 2 Design Items

Before completing the design items for the second proposal section you should be able to:

- Describe your proposed product or service and how it will work in the buyer's environment—the application.
- Define specific non-financial buyer benefits—*value*.
- Calculate specific financial benefits that show the buyer how they will save or make money—*value*.

You might find it helpful to review this section's design items before selecting or entering any information.

Section 3: Implementation

The third proposal section presents your plans for implementing the proposed product or service. Its primary purpose is to answer any questions the buyer might have regarding your ability to deliver on the contract.

Content Overview

Section 3 contains design items that create a proposal section with the following subsections and topics:

> **IMPLEMENTATION**
>> Process/Practice/Methodology Overview
>> Team (buyer and seller representatives)
>> Schedule
>> Implementation Phases and Deliverables

Additionally, one design item allows you to identify any appendices you want to include in your proposal to support the contents of this section.

Preparing to Answer Section 3 Design Items

Before completing the design items for this third proposal section, you should be able to:

- Describe your organization's standard implementation process, procedures, and implementation methodology.
- Identify individuals from the buyer's organization and from your organization to define the implementation team, including their roles.
- Define the implementation schedule by major phase.
- Define implementation activities and deliverables by major phase.

Note: If your company does not have a formal implementation or project management methodology, you first might want to review the design items in this section to help you develop one.

Section 4: Seller Profile

The purpose of the fourth recommended proposal section is to describe your company. This section can have different names depending on the buyer's business type. For example:

- A manufacturing company organization might title this section "ABC Specialty Manufacturing Profile."

- A professional services firm might title this section "Daniels & Associates: Practice Overview."

Content Overview

Section 4 contains design items that create a proposal section with the following subsections and topics:

> **SELLER PROFILE**
>
> Mission Statement *
>
> Company Overview *
>
> Facilities and Equipment *
>
> Production (or Service) Capacities *
>
> Design and Development *
>
> Customer Service and Support *
>
> Staff *
>
> References *
>
> *User defined subsections* **
>
> Quality *
>
> Why Us *
>
> * optional
>
> ** optional and multiple occurrence

Additionally, one design item allows you to identify any appendices you want to include in your proposal to support the contents of this section.

Preparing to Answer Section 4 Design Items

To complete the design items for the fourth sales proposal section, you need to have an in-depth understanding of how you or your company does business. If you work for a large corporation, you might need to ask for help from various department or division managers or gather appropriate written material on the organization.

Section 5: Business Issues

The fifth proposal section contains all the business issues of your proposal. It gives the buyer more critical information on which to base an informed buying decision:

- assumptions
- fees, prices, and other expenses
- invoicing schedules

Optional titles might include "Business Issues" and "Costs and Commitments."

Content Overview

Section 5 contains design items that create a proposal section with the following subsections and topics:

BUSINESS ISSUES

Assumptions *

Fees and Prices

Invoicing Schedule *

User defined subsections **

 * optional

** optional and multiple occurrence

Additionally, one design item allows you to identify any appendices you want to include in your proposal to support the contents of this section.

Preparing to Answer Section 5 Design Items

To complete the fifth proposal section you will need to carefully calculate fees, prices, and other costs. Most complex sales situations require extensive analysis by the seller to develop fees and prices. You might want to review the design items in this section before selecting or entering information.