

# **Propose It!**

## **v2.0**

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- 1. User's Guide**
- 2. Latest version of Propose It!**
- 3. Bonus diskette**

## 4. More programs

«DATA Merge File (Word)»

# PROPOSAL

**For**

«ADDRESSEE»  
«COMPANY»  
«ADDRESS»  
«CITY», «STATE», «ZIP»

Your Company  
123 Main Street  
Anytown, USA 10000

Your Name  
Your Title  
Your Phone Number

«DATE»

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## .c.Executive Overview

### **General Needs Statement**

*Formulate a general statement of the target company's main need.*

#### EXAMPLES

1.

In an increasingly competitive business world, how you communicate with your customers and how they communicate with you is vital to the continued success of your business. By exploring new ways to make those communications efficient, you increase your competitive advantage and make telecommunications an integral part of «COMPANY»'s strategy for success.

2.

Even though there are computers on just about everyone's desk, productivity hasn't increased during the last ten years. The reason is that most people have replaced other machines (typewriters and calculators, for example) with a computer. It is important for your company to achieve maximum productivity from your investment in its people and office machines. The gap between using a computer as a typewriter or a calculator and using it as a productivity device (saving time and being more creative) is bridgeable by learning more about what your computer is capable of doing.

3.

Having recently become a father for the first time, you have come to realize that planning for the future is more important than it once might have been. Making sure that your child faces a bright future is a desire that we all have.

### **Specific Needs of Target Company**

*Make a few statements about some very specific needs of this company or individual. The key to winning the business will likely revolve around how well you know and understand the real needs of your customer. If you don't get this*

*right, you may be proposing an inadequate or incomplete solution to your customer's needs. Bullet points are effective.*

EXAMPLE:

John Doe has identified several needs within your organization. Your current specific needs are to:

- decrease costs
- improve productivity
- consolidate vendors
- upgrade job skills
- improve coverage
- secure the future

### **Recommendation Summary**

[Your Company] has reviewed the objectives of «COMPANY» and is the ideal resource to meet these objectives. We can provide a wide variety of options tailored to fit your business needs.

### **Benefits**

*This is Salesmanship 101 - find out the needs, show the customer the features and benefits of your product or solution.*

### **EXAMPLE:**

Based on your business objectives, we recommend [products, services, etc.]. The benefits of the [Your Company] solution are

- reduced costs
- state-of-the-art technology
- single point-of-contact
- reputable vendor (financial strength, years in business, etc.)

## Financial Impact

*Show your customer the impact of your course of action will have on his business. Sometimes this may not be relevant or may be hard to quantify. If that is the case, don't use this as you will confuse the poor fellow.*

EXAMPLE:

Based on your current business needs implementation of this solution results in this financial impact:

Monthly savings	\$XXX.xx
Annual savings	\$X,XXX.xx

## What Your Company Will Do For Them

*These are the results of going with your company. Never promise something you can't deliver.*

EXAMPLE:

[Your Company] offers «COMPANY» a unique opportunity for high quality service while focusing on the bottom line. By implementing this proposal, [Your Company] will

- increase your profits by reducing costs
- maintain or increase the quality of your service with state-of-the-art technology
- consolidate vendors to a single-point-of-contact
- provide premier customer service
- increase the productivity of your employees
- increase your coverage without increasing costs or risk

## Your Business Objectives

In the international widget industry, products play a critical role in business success. [Your Company] understands that we must satisfy your specific needs to wind and keep your business. With this in mind, our analysis included

- analyzing your current situation
- consulting with your other vendors
- surveying select employees
- discrete financial analysis

Based on this analysis and discussion with «COMPANY»is personnel, we identified the following needs:

- Cost for [product] continues to rise to unacceptable levels. In the past, «COMPANY» has attempted to decrease these costs by using various vendors, with marginal or no success.
- Your ability to conduct business has been negatively affected by [lack of service, product deterioration, etc.] It is important to «COMPANY» to have an efficient and reliable product source.
- «COMPANY» has been dissatisfied with your vendors' responsiveness after the sale. Not only must «COMPANY» contact multiple vendors to resolve problems, but the response is frequently slow. At times, it is unclear how to contact vendor's customer service department.

In addition, because «COMPANY» continues to grow and requires additional [product, service], you'll need a [product] vendor that can provide high quality, secure, state-of-the-art services.

## Recommendation

In response to the specific needs and issues and to the business objectives that «COMPANY»'s staff have expressed, we recommend the following [Your Company] solution: [products, services, etc.]

*Outline specific components of your recommendation, for example, types of products, number of locations, any accessories, etc.*

Insert appropriate product information for your recommendation

Product description

- features description
- benefits

Product description

- features description
- benefits

In summary, the [Your Company] solution will align your systems with your business strategy.

*Place any product financial information here such as cost comparisons with competitive or present products. Keep it simple, preferably in table or graphic form for easy understanding.*

*Insert complete product information here. A good source for text is your own marketing materials, brochures, handouts, marketing department, old proposals, etc. Make sure you follow the old rule of listing features and benefits.*

### EXAMPLE

#### **Accounting Codes**

After each call, [Your Company] dials a 2 or 3-digit accounting code that you assign. The code identifies the call on the invoice as belonging to a particular department, client or project. Calls cannot be completed if the code is not entered. You can assign or reassign up to 999 accounting codes as needed.

#### Benefits

- Helps you identify abuse through accountability.
- Lets you bill back long distance charges by client, department or project.
- Saves accounting time and costs by detailing the invoice for you.
- Because you have up to 999 accounting codes, you have all the flexibility you need to assign and reassign codes as needed. The control is in your hands.

## Pricing

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*This is where you will want to include your general pricing information. The specific bid information should be placed above in the section entitled “ ”. This shows them what else might be available that they had not considered, serves as a reference source for future needs and may show them how much they are saving by being such a good customer of yours if you are granting them quantity discounts.*

## Implementation Plan

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When «COMPANY» accepts this proposal, we will begin this action plan to implement this proposal:

- Return signed copies of all orders, purchase orders, contracts.
- Ship your product, activate your service, start your coverage, etc.
- check your [service,product] after [installation, shipment]
- test service, follow-up

«COMPANY»'s order will be personally followed through the appropriate phases to ensure a smooth transition to [Your Company]. In addition, your [product, services] will be reviewed after [shipment, installation] to ensure «COMPANY» receives every possible benefit from [Your Company].

## Support Team

Premier customer service is an area in which we have a long-standing reputation for excellence. [Your Company] will provide «COMPANY» with all the support necessary to guarantee a proactive rather than a reactive level of service. This means that [Your Company] can and will meet any change in your needs.

Although our products make us a better {...} company, it is our people who set us apart. The members of the following [Your Company]'s Support Team will be personally responsible for assuring that all «COMPANY»'s objectives are met.

### **John Doe**

Senior Account Executive. Leader of your Support Team. Responsible for developing customer product applications and solutions. Recommends most efficient and effective [Your Company] solution. Overall responsibility for account management. Please call ...

### **Richard Roe**

Customer Service. Responsible for coordinating shipment, installation, implementation, provides on-going customer service contact, handles billing inquiries and adjustments. Please call ...

## **Joe Dokes**

Technical Support. Responsible for designing your custom product, plan, etc, so that you receive the greatest possible benefit from your [Your Company] product, service and to provide data and technical support to your support team. Please call ...

## **Customer Service Hot Line**

A «COMPANY» Customer Service Representative is available seven days a week, 24 hours a day to handle any problems with your service and product. Please call ...

## Corporate Overview

*A thorough history of your company*

Include:

Date of Founding

Where corporate headquarters are located

Scope - how many countries, amount of revenue, etc.

Number of employees

Organization of company

Technical accomplishments - if applicable.

Product innovations, if applicable

Company objective

Capabilities

Short summary of basic products

## Summary

The purpose of [Your Company]'s analysis has been to identify methods of assisting «COMPANY» in the achievement of its profit-oriented goals.

Analysis of [Your Company]'s needs reveals that by implementing the [Your Company] recommendation, «COMPANY» will realize a net profit improvement. This is achieved by substantially reducing current [product , service] expenditures.

The [Your Company] solution, (list product or service proposed) not only provides «COMPANY» with an attractive price, higher quality, and another source of supply, but will also reduce initial expenses due to our current promotions.

Through [Your Company]'s superior “hands-on” approach to the customer service team, implementation of services will be accomplished in a timely, professional manner, with frequent follow-up visits with appointed «COMPANY» staff. It is [Your Company]'s intent to earn a strong, trusting relationship with «COMPANY» secured through quick, smooth service transition and organized, open communication between both companies. The [Your Company] customer service team will be available 24 hours a day, 365 days a year.

In short, [Your Company]'s recommendation presents a lucrative business opportunity in positive financial terms,

superior product quality, and dedicated customer support.

[Your Company] respectfully requests your serious consideration to begin a long-term, solid relationship between [Your Company] and «COMPANY».

## References

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*I think it goes without saying that only put those companies or individuals on this list that you have previously contacted and have given their approval to be used as references. A neat little trick some people use is to call the ones listed last so make sure that they all are good references.*