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# Propose It!<sup>tm</sup>

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## Introduction

A couple of years ago when I was between jobs, I worked for a temporary employment agency. One of my assignments was with a large telecommunications company as an administrator in the corporate sales department. I supported the correspondence of 60 sales people who were working accounts ranging from Mom & Pop to the Fortune 500.

The first day on the job I was given an overview of the job - generating all the correspondence necessary for the sales people to close the sale. One of the first things to cross my desk was a proposal. I asked around for the format they wanted it in and looked for some template files to generate the project. To my surprise, there was nothing available. What they had done up until that point was to take old proposals and just change a few things and out the door it went. It was all done manually.

Faced with the number of people I supported and the amount of correspondence generated, as soon as I got the pressing work out of the way, I started digging up boilerplate from wherever I could find it. I took the best from about five proposals that were on the computer and set about to automate the process. Rather than retype everything manually as had been done up till then, I set up a series of files as "search-and-replace" documents.

From that beginning, I have put together more files and ideas and developed "Propose It!<sup>™</sup>" for those who may need a helping hand. By putting together a professional looking document with "Propose It!<sup>™</sup>", you will make yourself and the people you work with more valuable.

## Requirements

All you need to use "Propose It!<sup>™</sup>" is a word processing or page layout program. Nothing else is needed, except a desire to create professional appearing proposals.

Although not required, I think that the best output will come from a laser printer rather than a dot matrix printer. Ideally you should be able to choose from a variety of fonts and font sizes.



# Shareware

## **DEFINITION OF SHAREWARE**

Shareware distribution gives users a chance to try software before buying it. If you try a Shareware program and continue using it, you are expected to register. Individual programs differ on details – some request registration while others require it, some specify a maximum trial period. With registration, you get anything from the simple right to continue using the software to an updated program with printed manual.

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Shareware is a distribution method, not a type of software. You should find software that suits your needs and pocketbook, whether it's commercial or Shareware. The Shareware system makes fitting your needs easier, because you can try before you buy. And because the overhead is low, prices are low also. Shareware has the ultimate money-back guarantee – if you don't use the product, you don't pay for it.

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any one computer at any one time. You must treat this software just like

a book. An example is that this software may be used by any number of people and may be freely moved from one computer location to another, so long as there is no possibility of it being used at one location while it's being used at another. Just as a book cannot be read by two different persons at the same time.

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You are encouraged to pass a copy of "Propose It!<sup>tm</sup>" along to your friends for evaluation. Please encourage them to register their copy if they find that they can use it. All registered users will receive a copy of the latest version of "Propose It!<sup>tm</sup>". If you have any questions, please contact me via one of the following addresses:

Grand Universal  
David A. Works  
7061 East Wesley Avenue  
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CompuServe-70400,153  
Delphi - DAVIDWORKS  
GEnie- D.WORKS3  
America OnLine- DAVIDW2959

Usage

Good writing takes time and preparation. In the beginning, you may just use "Propose It!<sup>tm</sup>" verbatim. That's okay. But the real goal is to improve on these ideas and make them your own. Not to scare you, but I change my correspondence about every two weeks because I get new ideas or I get bored. I am constantly looking for a better way to present my ideas.



You may even want to look at other programs, books or other sources. Frankly I think books are dumb because you have to retype the whole thing and the prices are outrageous. I know, I have bought a couple over the years and I spent a fortune. Unfortunately, I didn't get that much for my money as most of the authors seem to be pretty stuck on themselves and seemed to believe their own marketing hype.

Here are some ideas to get the most out of "Propose It!<sup>tm</sup>":

- Print out this documentation file and bind it.
- I have designed "Propose It!<sup>tm</sup>" to be used as a set of mail merge documents. I learned after a few "interesting experiences" that global search-and-replaces can get weird. Besides, by using a mail merge you can put in the letters you will need with the proposal at the same time. The idea is to save time.
- Always follow any standards or formats that your company has set up. Just because "Propose It!<sup>tm</sup>" is neat and will save you time so that you can play computer games doesn't mean you should ignore any corporate standards. "Propose It!<sup>tm</sup>" is written in Times or Helvetica fonts and the margins are all changeable to suit your needs.
- Familiarize yourself with the "merging" capabilities of your software package. To spare you the agony of reading a manual, I have included a section on "Merging".
- Incorporate your own material into "Propose It!<sup>tm</sup>". If you are in a corporation you should have enough marketing mumbo jumbo to last you an eternity. If you are in a small company, you still must have a few brochures lying around that you can cannibalize and incorporate.
- Give your secretary a raise or a piece of the action after she starts using these templates. She or he is making you look better than you are so show some appreciation you old skinflint.
- Print out the "Sample" files to use as another reference. These files have the letters \*sam.txt in them.

## Files

### **Coverltr.wp or Coverltr.doc**

[Cover Letter] Use this letter with larger proposals. It isn't good form to just send out a proposal without a cover letter. People like to know what they are receiving.

### **Manual.wp or Manual.txt**

This file - full of wonderful ideas. Also includes registration form.

### **Largepro.wp or Largepro.doc**

[Large Proposal] Template for proposing large or more complicated projects.

### **Letter1.wp or Letter1.doc**

[Letter Proposal] Templates for proposals in letter form. Also includes an overview template which I have found very useful to include along with a letter proposal to larger companies.

### **Register.wp or Register.doc**

A separate registration form that you can print out and send in.

### **Cvltrsam.txt, Largesam.txt, and Letrsam.txt**

Samples of Cover Letter, Large Proposal and Letter Proposal.

All of these files and their particular usage are explained in more detail below.

## Preparation

**Note: Ignore everything else if you want to, but please read this!!!**

This is frankly the most important part of your work. It's even more important than the "Propose It!<sup>tm</sup>" templates.

The old line, "Plan your work and work your plan" applies doubly in proposal writing. How would you like to spend weeks sweating over a proposal only to find out yours was not accepted as you didn't really solve the problem the customer wanted solved?

### **True Story #1**

A Company I worked for spent about two months and thousands of dollars in travel, computer rental and aggravation designing a telecommunications proposal for a large defense company. My group was responsible for designing the network. We frankly just did as we were asked by the account team. Part of good design is getting the best cost for your network design. In working with the pricing and the RFP (Request for Proposal), it became obvious to us that what the client wanted was not a network with all the bells and whistles (which is what we had been told to design) but in actuality they wanted the lowest price. Hundreds of people spent months on this project when in fact the account team and our little group of six could have done it all in about two weeks time. Needless to say, we did not win the proposal.

Remember that you are solving a customer's problem so you had better know exactly what the problem is. Your solution may be the best thing since sliced bread, but if the client wants dinner rolls...

Also, be brave enough to give up if you can't really handle a project or if you don't want to deal with any hassles. I recently gave up on a government proposal because of the bureaucratic paperwork nightmare. It was about \$40,000 worth of business but the aggravation factor was the most extreme for any proposal that I had ever seen.

Ideally if you anticipate being in an RFP situation, the best time to inform yourself is before the RFP is written. That way you might have some influence in what actually will be asked for. Most companies appreciate the insight of vendors and are bright enough to know when you are trying to skew things your way as well, so don't over do it.

Using "Propose It!<sup>tm</sup>" should come in at the last phase of your proposal scenario. If you start writing before you know the problem or have developed a solution, you will end up with a very muddled proposal. (Of course, there are oftentimes many questions which are a matter of routine which can and should be answered before you get into the heat of proposal deadlines.)

I have found that the best way to prepare is the old boring way of writing an outline. You know, the old Roman numeral "I, II, III, A,B,C" routine that we all learned in grade school. If you are lucky, your word processor will help you by having the outline feature. If not just hack away anyway.

## **True Story #2**

A few months back I wrote a business plan for a wild-eyed business idea that I had. I must have revised the dumb thing about 200 times before I got fed up, I started over with an outline. Finally I could understand what I was trying to say. I wish I could tell you the business was a rip roaring success and that I am now on "Easy Street", but after playing with it for a few months I gave up on it. Frankly, I wouldn't have known to give up had I not organized my goals and objectives well to see that even though there was great potential, my comfort zone of how much effort it was going to take versus the amount of money I might theoretically make was invaded. Anyway, wait for the shareware edition of my business plan templates. It really did come out ok and the financials are great!

## **Customizing**

One last bit of preparation to use these files is to customize them for your company and product. First open any document. Do a search-and-replace on [Your Company] and change it to the name of your company. To do this WordPerfect 5.1, use <Alt>F2, enter [Your Company], hit F2, enter the name of your company and then F2 again to complete. You may also choose to do the same thing with [product/service] in each document. However, sometimes the usage of the word may require a generic product or service name and other times it may be specific. For example, the difference between "soda pop" and "Coca Cola". Also you will want to change "Your Name" to your name and change the "Marketing Representative" to your title.

## **Mail Merging**

Doing a mail merge is different for every software package, so check your manual to find out how to incorporate what I have into the correct commands for your program. (Don't ask me why no one has bothered to standardize this part of computing. Seems rather obvious, doesn't it? H'mm another shareware idea...) Basically, a mail-merge follows this way.

1. Open the merge file.
2. Enter the data requested (usually separated by commas).
3. Save the merge file. In WordPerfect it is easy to remember a merge file by naming it with a .sec extension to show it is a secondary file.
4. Open the main file you want to merge. In WordPerfect hit <Ctrl>F9. Enter the name of the primary, then the secondary file. It is merged automatically.

## Getting Started

After you have downloaded "Propose It!<sup>tm</sup>" and decompressed the files, please copy them onto a floppy disk so that you have a back-up. You will probably goof them up a number of times, so be prepared. I accidentally trashed this file a number of times before I got it right. Everybody does it so don't feel bad. Don't believe anyone who says they never have - obviously an incredible boor and not good company at a cocktail party.

Open your particular word processing application and then open and save each file.

Please print out the "Manual" file. I know this sounds stupid since you have already gotten this far, but I guess I need to say it anyway. Now go back and re-read the "Preparation" section and do that first.

Now read through the next few sections and pick out a file which you think will work best for you.

I much more a fan of substance over style, but style does have its place. Would you pay more attention to an idea on scratch paper or one that has been neatly organized with some jazzy graphics and type? If you are honest, you will say that it doesn't really matter if the idea is good. But we are talking about making it easy for your customer to get a handle on what it is you are proposing. I would much rather be bored looking at someone's proposal in Times and Helvetica than some chicken scratched refugee from McDonald's.

So what I am saying in a round about way is to get creative in using fonts, font sizes, effects and some graphics. In case you haven't noticed, Courier died a quiet death a couple of years ago. Times and Helvetica are ok, but there are some really neat fonts out there and a number of books to help you through the muddle. But start with Times and Helvetica and you won't go wrong.

## Cover Letter

It is good business form to include a cover letter (some people call it a transmittal) to accompany a large proposal. Not that anybody pays attention to what you say in the letter. Call it protocol. If you haven't done your homework and presentation by this point, it won't matter what you have to say anyway. If you walk into IBM Headquarters with the best idea in the world, but are dressed in a Hawaiian shirt and shorts, guess how many people will listen to you? Think of this letter as the "white shirt, blue suit and conservative tie" of your proposal. Once you get past that it really gets interesting.

I have only included one example since it is such a formal letter. When you open this file, you will notice that it is set up as a mail merge file. Change the necessary information in the "Merge File" (See "Merging Files"). Complete the merge and your cover letter is finished.

## Large Proposals

These are the hardest to write and take the most preparation. There is no set "standard format" so you are free to be creative. I am assuming you have done all your investigating and all of your research to make sure that the solution you are proposing is in fact the correct solution for your customer and also one which they will want.

## Letter Proposals

I think these are the most fun to write and I change them constantly. For a sales type, I have found that this is the best way to get your point across in a quick way and with a great degree of success.

Here is a little hint. In my line of work, I have found that I never really get to the real "decision maker" (How's that for sales lingo?) I end up talking to somebody else who really needs what I am offering but has to get approval from someone else. Didn't you get awfully tired of all that training on getting to the decision maker? What a bunch of junk for my situation. I just sell everyone along the way. And I give them the power to do my selling for me. Susie secretary runs into the office with my proposal and says, "Boss, I need this now." So he looks at this fine piece of literature and agrees because he knows exactly what his employee wants as it is in writing. Here is another silly sales word but it fits "Empowerment" (trumpet blast) get your contacts to sell for you.

## Overview

This is a handy dandy document to go along with a letter proposal. This contains many of the items in the Large proposal. You use this to introduce your company and to show off all the wonderful things you can do for your client. Sure you can tell him all about it, but there is nothing like having it in writing.

I print up about 10 copies of my overview at a time, bind them nicely using some nice cover stock for a cover and put it along with my main sales literature into a folder to mail to my client. Looks like I slave hours and hours creating this wonderful document just for him. I spent hours and hours on it years ago when I first started writing these things, now it takes all of five minutes to mail merge a letter proposal, organize a folder with sales info and stuff the envelope. This is the epitome of computer productivity.



# "Propose It!<sup>tm</sup>" REGISTRATION FORM

"Propose It!<sup>tm</sup>" is shareware and is copyrighted by David Works. You have 10 days to evaluate "Propose It!<sup>tm</sup>". After that time, you are required to register the copy in your possession. The registration fee is **\$25**. When you register, I will send you a disk with the most current version.

This wonderful piece of shareware may be distributed by anyone as long as all of the files are sent along with it. Obviously, you can't turn around and sell it yourself as it is copyrighted. But if you are one of the national online services, shareware distributor , BBS or even a propellor head, pass it around.

Name \_\_\_\_\_

Company Name \_\_\_\_\_

Address \_\_\_\_\_

City \_\_\_\_\_ State \_\_\_\_\_ ZIP \_\_\_\_\_

P.O. # \_\_\_\_\_

How many copies do you want? \_\_\_\_\_

Type of computer:

**\$25**

Send to:

Grand Universal  
David A. Works  
7061 East Wesley Avenue  
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