



# PROPOSAL KIT SAMPLE

## SAMPLE ESTIMATE PACK DOCUMENT

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Estimate Pack is a set of pre-designed spreadsheets for estimating a variety of projects. The collection as a whole will meet many of your needs.

The spreadsheets are designed to facilitate fast and easy calculations for project estimates. These estimates can then be fine-tuned over time to become more and more accurate.



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## Implementation Plan Calculator

	Start On:	11/19/2017							
Description	Duration (in Days)	Start Date	End Date	Days Till Next	Total Days	Duration (in Weeks)	Duration (in Months)	Duration (in Years)	
<b>Initiation Phase</b>									
Proposal acceptance	1	November 19	November 19	1	1	0.2	0.1	0.1	
Contracts signed	1	November 20	November 20	5	5	0.2	0.1	0.1	
Assign project team	2	November 25	November 26	2	3	0.3	0.2	0.1	
All client supplied materials due	0			1	0	0	0	0	
<< Schedule Item #5 >>	0			1	0	0	0	0	
<< Schedule Item #6 >>	0			1	0	0	0	0	
<< Schedule Item #7 >>	0			1	0	0	0	0	
<< Schedule Item #8 >>	0			1	0	0	0	0	
<< Schedule Item #9 >>	0			1	0	0	0	0	
<< Schedule Item #10 >>	0			1	0	0	0	0	
Totals for Phase:	4				9	0.6	0.4	0.1	
<b>Planning Phase</b>									
Start project planning	2	November 28	November 29	10	11	0.3	0.2	0.1	
<< Schedule Item #12 >>	0			1	0	0	0	0	
Project planning complete	0			1	0	0	0	0	
Start project design	0			1	0	0	0	0	
<< Schedule Item #15 >>	0			1	0	0	0	0	
Project design complete	0			1	0	0	0	0	
<< Schedule Item #17 >>	0			1	0	0	0	0	
<< Schedule Item #18 >>	0			1	0	0	0	0	
<< Schedule Item #19 >>	0			1	0	0	0	0	
<< Schedule Item #20 >>	0			1	0	0	0	0	
Totals for Phase:	2				11	0.3	0.2	0.1	
<b>Execution Phase</b>									
Development milestone #1 completion	2	December 9	December 10	1	2	0.3	0.2	0.1	
Development milestone #2 completion	0			1	0	0	0	0	
Development milestone #3 completion	0			1	0	0	0	0	
<< Schedule Item #24 >>	0			1	0	0	0	0	
Project Alpha completion	0			1	0	0	0	0	
Project Alpha testing completion	0			1	0	0	0	0	
Project Beta completion	0			1	0	0	0	0	
Project Beta testing completion	0			1	0	0	0	0	
<< Schedule Item #29 >>	0			1	0	0	0	0	
<< Schedule Item #30 >>	0			1	0	0	0	0	
Totals for Phase:	2				2	0.3	0.2	0.1	
<b>Testing and Acceptance Phase</b>									
Final testing completion	2	December 11	December 12	1	2	0.3	0.2	0.1	
Performance metrics testing	0			1	0	0	0	0	
Specifications testing	0			1	0	0	0	0	
Project Final completion	0			1	0	0	0	0	
Client approval on final release	0			1	0	0	0	0	
<< Schedule Item #36 >>	0			1	0	0	0	0	

<< Schedule Item #37 >>	0			1	0	0	0	0
<< Schedule Item #38 >>	0			1	0	0	0	0
<< Schedule Item #39 >>	0			1	0	0	0	0
<< Schedule Item #40 >>	0			1	0	0	0	0
Totals for Phase:	2				2	0.3	0.2	0.1
<b>Closure and Transfer Phase</b>	<b>Start On:</b>	12/13/2017						
Installation	2	December 13	December 14	1	2	0.3	0.2	0.1
Final installation testing completion	0			1	0	0	0	0
Documentation delivered	0			1	0	0	0	0
Training completion	0			1	0	0	0	0
Back up and archive all project information	0			1	0	0	0	0
Contract acceptance signoff	0			1	0	0	0	0
Post-project analysis (lessons learned)	0			1	0	0	0	0
Enter maintenance phase	0			1	0	0	0	0
<< Schedule Item #49 >>	0			1	0	0	0	0
<< Schedule Item #50 >>	0			1	0	0	0	0
Totals for Phase:	2				2	0.3	0.2	0.1
Time to Completion (Days):	26							
Time to Completion (Weeks):	4							
Time to Completion (Months):	1							
Time to Completion (Years):	0.1							

**Important:** Set the "Start On" date for each phase to the last actual date from the previous phase plus the days till next value. Since the last used date for each phase will change depending on how many you use from each phase you have to manually set this for each subsequent phase.

Fields in white are data entry fields.  
Fields in blue are dynamically linked to the Word template. These fields may be data entry fields or may contain calculations.  
Fields in green contain calculations and are not dynamically linked to the Word template.

If you use the dynamic linking to your Word template feature the tags in the Word template will be replaced with dynamic links to the cells in blue. For example, in the Word template Schedule.doc the <<R10C3>> corresponds to cell row 10 and column C. C is the 3rd column over. If you customize the spreadsheet and Word template all you have to ensure is the <<R#C#>> tags match up with the correct cells and the Wizard will do the work of turning them into dynamic links. When you save your spreadsheet the Word template will update when it is opened.

If the Days field is 0 the dates will be blanked out. The calculator is a simple rolling timeline where every date falls after the next so a single lines Start and End dates will not span lines under them (unless you manually change the cell calculations).

**NOTE:** Use negative numbers in the Days Till Next column to have a schedule item fall on a previous date in the time line. This allows you to have overlapping or simultaneous tasks.

**NOTE:** The in Weeks, in Months and in Years Duration columns are calculated for your use should you choose to want to use them for schedules that are in longer timeframes. Edit the column numbers in the associated Word template to link to these columns instead

This estimate document is only included in the [Proposal Kit Professional](#) product.

This sample has been truncated to only show the first part. The complete editable version of this document is included in the Proposal Kit Professional product found at:

[ProposalKit.com/htm/proposal-software-products.htm](http://ProposalKit.com/htm/proposal-software-products.htm)

