



# PROPOSAL KIT SAMPLE

## New Sales Office Sample Proposal

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Leon Crandall  
Vice President, Operations  
Swainsen Transport  
493 West Port Ave  
Santa Fe, NM 87505

Mr. Crandall,

Please find enclosed an analysis and position descriptions for a proposed new sales and dispatch office in Monterrey, Mexico.

As you know, with NAFTA approval of Mexican truck service in the United States, commercial traffic has been increasing exponentially each year between the United States and Mexico. Up to now, we have relied on partnering with Mexican carriers for our transportation contracts that include moving goods south of the border. In the last seven years we've expanded our business from our New Mexico office west into California and Arizona and east into Texas, covering all the border states. We now believe that there is no good reason to leave the south-of-the-border portion of the business to our Mexican counterparts.

Swainsen Transport is already well known in the southwestern United States, and we believe that it is now in our company's best interest to open an office in Mexico as soon as possible.

Sincerely,

Alex Frederick  
General Sales Manager  
Swainsen Transport  
555-555-9820  
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# PROPOSAL

## New Sales and Dispatch Office

Prepared for: Leon Crandall  
Vice President, Operations

Prepared by: Alex Frederick  
General Sales Manager





# GETTING STARTED

Assuming that the board approves of our plans to open an office in Monterrey, Mexico, we propose the following steps to get started.

- Send Mike Ortiz, the General Manager of our Albuquerque office, to Monterrey to acquire necessary licenses, scout out a location, and interview general manager candidates for our new office. Mike (Miguel) is the American-born son of Mexican immigrants from Saltillo, a town not far from Monterrey. He speaks Mexican Spanish fluently and knows the business and cultural climate in the country, because he still has many relatives in Mexico. We anticipate that this process could take anywhere from six weeks to three months to get licensed, locate and secure a site, and hire a General Manager for Mexico. During this time, Mike Ortiz could choose to relocate temporarily to Monterrey or to commute back and forth weekly between Monterrey and Albuquerque, with all travel and living expenses paid.

Mike Ortiz has agreed in principal to take on this responsibility, and the Assistant Manager in Albuquerque, Teresa Wellsley, has agreed to fill in for him as needed in Albuquerque.

- Plan a U.S. media campaign to inform our U.S. customers about our new Mexican connection, so that the minute our Mexican office is operational, our customers will be positioned to take advantage of it.
- Plan a Spanish-language media campaign to let potential Mexican customers know about our new location and services, and to attract independent Mexican truck drivers to work for us.

HR and Accounting departments need to develop a plan to deal with Mexican employees. Issues to be decided are: How to equate U.S. benefits with Mexican benefits? Whether the pay rate for Mexican employees should be a conversion each period from U.S. dollars to Mexican pesos, or whether the pay rate should be a set rate in Mexican pesos and thus 'float' with the monetary patterns in Mexico.





# CHALLENGES

We recognize that we will face certain challenges in opening our Mexican office. Here are a few considerations we've discussed. You may think of others to add to this list.

- **Maintenance of current standards and reputation.**

Business in Mexico can be rather 'fast and loose,' with officials sometimes looking the other way rather than enforcing the rules. It's not in our best interest to skirt regulations or lower our expectations for our employees and subcontractors on the other side of the border. We want to maintain our reputation of excellence in both countries.

To do this, we must be absolutely certain that all our drivers in Mexico have a valid Licencia Federal de Conductor (LFC), the equivalent of our Commercial Driver's License (CDL). Fake licenses are common in some areas; we need to establish a cross-check policy with official lists. We must also ensure that all trucks driven by our own drivers and by subcontractors meet our Commercial Vehicle Safety Alliance (CVSA) standards and carry their inspection decal, and abide by all rules established by the Federal Motor Carrier Safety Administration (FMCSA), whether traveling in Mexico or in the United States.

- **Border-crossing security issues.**

As everyone knows, there's a big problem with illegal immigrants and substances crossing the U.S.-Mexico border. We never want any of our trucks to be caught carrying any illegal merchandise. To ensure this, we must do a thorough background check on every driver who works for us, and establish a policy of drivers inspecting and locking all loads after every pickup.

- **Language issues.**

To increase the flexibility of our staffs in both the U.S. and Mexico, we should consider offering (or at least offering to pay tuition for) Spanish classes for our U.S. employees and English classes for our Mexican employees. We may also need to make sure that the paperwork our drivers carry is translated into both languages if they are driving loads that cross the border.

- **Morale issues in an international company.**

It's important that employees on both sides of the border feel like they're working for the same caring company. We may want to establish some regular company activities in which employees cross the border and meet their counterparts in the other country.



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