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August 25, 20xx

Cynthia Maxton
CEO
Kalista Media Management
927 Loupe Drive
Los Angeles, CA 90007

Dear Ms. Maxton,

We know that Kalista Media Management handles media campaigns for hundreds of important people and products each year. That's a huge undertaking, especially when you work with a wide variety of media partners around the world.

Did you know that your work process could be made more efficient by using project management software? Overvue-1000 was designed for a company just like yours, with the need to handle multiple projects, collaborate with dozens of parties in differing time zones, and track budgets and schedules.

Please have a look at our enclosed proposal. We think you'll see how you can use Overvue-1000 to streamline your management processes, provide greater job satisfaction for your employees, and amaze your clients by handling complicated schedules with ease. Overvue-1000 can cut the time all team members spend on each project, thus freeing your company to take on more clients and rise even higher on the ladder of success.

Sincerely,

Alexis Williams
Client Outreach
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PROPOSAL

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August 25, 20xx

Proposal to Streamline Kalista Media Management's Workflow with Overvue-1000

Prepared for: Cynthia Maxton
CEO, Kalista Media Management

Prepared by: Alexis Williams
Client Outreach, Joyal Software Inc.



DESCRIPTION

Kalista Media Management can be more efficient and more successful by using Overvue-1000, our award-winning project management software.





TABLE OF CONTENTS

Needs Assessment

Needs Assessment	2
------------------	-------	---

Goals and Objectives

Features	3
----------	-------	---

Methodology

Scheduling	4
Collaboration	5
Communications	7
Licensing	8
Reporting	9
Time Line	10
Accounting	11

Evaluation

Requirements	12
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Qualifications

Company Information	13
Testimonials	14





NEEDS ASSESSMENT

Joyal Software has identified the following needs within Kalista Media Management.

Kalista Media Management oversees projects of all sizes. Some projects involve only a few parties and a short time frame, such as putting together a few radio ads for a client over a six-week time frame. Other projects may be more complex, such as a major media campaign for a candidate, which can last for more than a year and include all forms of media.

Advertising revenue has declined in recent years, and this means you must take on more clients with smaller budgets to maintain your current position in the market. Using efficient project management software such as Overvue-1000 can help you do more with the same resources.

Like most companies using non-dedicated software to do project management, you employ online calendars and spreadsheets and write a lot of memos and conduct continuous meetings to keep all your staff informed and on track.

Now imagine that you can assign all involved employees to your project and all of them can view the same schedule and make adjustments and comments as needed from their desks. The project manager can be instantly notified of the change, check the effect on the overall schedule and either approve it instantly or sit down with that particular employee to work out the issue. No long group discussions in which no actual work is completed! Your employees will be free to accomplish real tasks, not just discuss the changes of the week. This all leads to more efficient project management, which leads to the ability to take on more clients, and glean more profits.

Need:

Kalista Media Management needs a project management software solution to make their workflow more efficient and enable them to grow their client base.

Solution:

Joyal Software's award-winning project management software package, Overvue-1000, will allow everyone assigned to a project to share information and view and update a project schedule while allowing managers to oversee the process. With Overvue-1000, every employee works more efficiently.

Studies:

See Software Solutions Magazine, vol. 11, *Can Project Management Software Really Help?* This documents a study that tracked the processes of four different companies before and after adopting Overvue-1000. Each experienced an efficiency gain of at least 40%.





FEATURES

Overvue-1000 is packed with all the features you need to efficiently manage multiple products, merged into one easy-to-use interface.

Overvue-1000 includes:

- **The bulletin board** – This is what we call the file storage and collaboration area of the product. Team members can post messages and comments, and store and link to diagrams, PDFs, spreadsheets, photos, videos—you name it. This facilitates communication and collaboration. The project manager controls access to different parts of the bulletin board. See the Communication and Collaboration pages for more information.
- **The schedule and calendar** – Managing the schedule is probably the most important job the project manager has to do. In Overvue-1000, any assigned team member can view the schedule, but only those approved by the manager can adjust it. When one date is changed, the schedule automatically adjusts. The schedule can also be viewed (and printed) in traditional weekly or monthly block format. See the Scheduling and Calendar pages for more information.
- **Cost management and invoicing** – As well as responsible parties and timelines, expected costs can be assigned to tasks for easy comparison with real costs and periodic invoicing. At any time a manager can see where the project is in terms of the budget. See the Accounting page for more information.
- **Library of common tasks** – Most organizations repeat many of the same tasks from project to project. In Overvue-1000, once you define a task by personnel required, time to complete, and dependencies, you can save that definition to use over and over again. So the longer you use Overvue-1000, the easier it is to set up a new project.
- **Reporting function with template library** –Overvue-1000's reporting function is linked to the schedule, bulletin board, and cost management functions, so it's easy to generate standard reports, charts, and spreadsheets. You can use our pre-designed templates or create your own. See the Reporting page for more information.
- **Secure access controls and change tracking** –Overvue-1000 puts the project manager (or management team) in the driver's seat. The manager controls which portions of the data and schedule any team member may access, as well as who can make changes to the schedule. Each post, comment, file access, and change is tracked within the system, keeping a constant trail of who did what.





SCHEDULING

A major feature of Overvue-1000 is its scheduling component.

It's easy to get started

Identify each task you need to do, how long it typically takes to complete, and its dependencies. Block out times on the calendar when work cannot be dedicated to that project—holidays, weekends, time committed to other assignments, etc. When your task list is complete and your calendar dates have been reserved, plug in the start date for your project, and Overvue-1000 generates a project schedule for you. Assign team members to tasks. Then share your preliminary schedule with your team members and collect their feedback online.

It's easy to update

You decide who can view and adjust your project schedule. Adjustments to times for task completion or start dates of tasks will automatically adjust the entire schedule for everyone to see.

Links to email and calendar

The schedule function can automatically remind team members via email of the deadlines for their assigned tasks. Every time the schedule is updated, all team members will be informed.

The schedule can viewed in traditional calendar format, with important events noted in date squares, or in a running timeline chart, with important events marked at intervals.

Use the same task definitions over and over again

Odds are that you repeat many of the same tasks for each project. After you have a task defined in Overvue-1000, you can plug that task into any new project. So project management gets easier the longer you use Overvue-1000.



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