



# PROPOSAL KIT SAMPLE

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

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,

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# PROPOSAL

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

Prepared for: Cynthia Maxton  
CEO

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# NEEDS ASSESSMENT

Joyal Software Incorporated 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 Incorporated'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.



# COLLABORATION

We know that Kalista Media Management needs to collaborate with multiple parties around the globe. Depending on the type and scope of project you are handling, you may deal with television stations, radio stations, newspapers, magazines, and internet communication experts in multiple countries.

This means you need to share a lot of information with multiple parties in different time zones. And you may not want each party to have access to the same information that you share with others. The need to guard proprietary information but still communicate and keep multiple parties on track can make project management a stressful experience.

Overvue-1000 allows a project manager (or a management team) to partition a central access area (we call this our online "bulletin board") into different sections and control access to each. You can allow your project partners to see the overall schedule and information for a project, or confine them to just their particular section. So it's easy to specify that the German television station has access to Photos 1 through 5 but not to Press Releases 2 and 3, while allowing your Australian partners access to all.

Let's look at a couple of hypothetical examples of how collaboration could work if Kalista Media Management uses Overvue-1000.

- ➔ Collaboration between Kalista Media Management, Los Angeles, CA, and British News Today, London, England.

Kalista Media Management is the project manager for a politician/author, setting up a series of interviews that will appear in newspapers throughout the UK as part of a global media campaign for a book release. British News Today is interested in covering news about U.S. political issues. The typical work days of Kalista Media Management and British News Today overlap for only an hour or two, making collaboration difficult.

This collaboration might begin with a friendly phone call, but after a verbal statement of interest has been expressed, all arrangements, ideas, and information sharing could be done through Overvue-1000. That way parties in all time zones—including the client, the politician/author, who travels almost constantly—can easily communicate at convenient times for them and securely share contracts and sensitive information. The resulting newspaper articles could also be stored on Overvue-1000 for reference by other parties involved in future parts of the project.



- ➔ Collaboration between Kalista Media Management, Los Angeles, CA, and NYC Channels, New York City.

Kalista Media Management is the project manager for a company releasing a major new technology product, setting up a series of television ads that will appear at various times on channels owned by NYC Channels in the northeastern part of the United States. Programmers at NYC Channels will need to access promotional materials at different times of day on multiple days, and Kalista Media Management will need to track responses to ads on an associated website.

After setting up the basic 'handshake' arrangement, all contracts and even finished video ads can be passed back and forth using Overvue-1000. The project manager can note the ads on the project schedule and track "hits" and orders on the client's website, posting results that all parties can access to determine whether ads have been effective.

We know that you need to collaborate creatively with multiple parties in multiple time zones. You need to have access to information from all parties in a time frame that's convenient for you and securely stored away from unauthorized access. Overvue-1000 allows you to do all that. No more 5 a.m. conference calls or blurred faxes waiting on a central fax machine for pickup. With Overvue-1000, all you need to effectively manage your project is in one secure place.



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- 1) After purchasing, downloading, and installing your Proposal Pack and Wizard software add a new project in the Wizard.
- 2) Click the Pick Documents button then click the View Samples tab.
- 3) Select the title of this (or any other) sample and click the Import Content from Selected Sample button.
- 4) Customize the chapter list as needed to suit your situation. You can add additional chapters from the library of 2000+ topics, reorder chapters, remove chapters.
- 5) When you save your project, the Wizard will build you a custom version of this sample in the visual design theme Proposal Pack you purchased applying all your customizations (logos, font types, color schemes, contact information, etc.).
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[ProposalKit.com/htm/proposal-software-products.htm](http://ProposalKit.com/htm/proposal-software-products.htm)

