

xertion

The quality of proposals plays a major role in any company's success. Sometimes, companies don't have the right skills or resources and need to outsource certain tasks to create proposals that beat the competition.

With wide experience in developing and improving complex proposals, xertion applies professional expertise to deliver exactly what you need, whether it is document management, writing, editing or layout and design.

Working as part of your team, we help you create a response that gives clear and compelling reasons why your client should choose you. The result? Your proposal will contain truly customer-focused text that is well structured and attractively presented.

services | tailored to suit



Organisations who buy IT products and services complain that many Service Providers don't address their requirements.

Often, proposals are not convincing because they have one or more of these failings:

- * Use 'boilerplate' material obviously prepared for other clients
- * Don't answer the questions concisely and clearly
- * Don't demonstrate a real understanding of the client.

Using a few simple techniques, xertion will help you create compelling, customer-focused proposals that win business.

Our comprehensive proposal support incorporates expert document management and supply of the following elements:

- * Proposal writing
- * Editing and proof reading
- * Page layout and design.

From the outset, we facilitate the planning and production activities, allowing you to manage the business and focus on your client and the solution.



For every proposal, we begin by spending an hour or two with the Sales Executive or Account Manager and other team members who have client knowledge. We analyse the sales opportunity and draw out the client's real issues. From this, we will set a plan for creating an effective response for your client that includes the following:

- * Determine a logical proposal structure
- * Create truly customer-focused text
- * Write a compelling Executive Summary

Determine a logical proposal structure

RFPs and ITTs usually dictate the structure but it's important to be concise and logical. Defining your structure early avoids a rising page count and helps you write more concisely. All too often, many proposals provide two pages where one paragraph will do—and often include pages of irrelevant text. We will help with structure right from the start.

Create truly customer-focused text

You have hundreds of words about your organisation, but what about the client's organisation? The client wants to know how you will benefit his business. He wants to know if you understand his predicament. Why he should choose you rather than your competition. We will help write material that has real meaning for the client—even in the pricing or finance areas.

Write a compelling Executive Summary

An Executive Summary must be concise—three to five pages—targeted at the decision makers. The real decision maker in your client organisation may not be the day-to-day contact or whoever issued the RFP. We will help you create an Executive Summary with clear and compelling reasons for the decision maker to choose you.

A proposal is not a technical document—it is a unique marketing opportunity.

services | editing & proofing



If various subject matter experts have drafted sections, they may benefit from a substantive edit, which involves some rewriting and restructuring to ensure consistency and smooth transitions. We reorganise and rewrite your document, developing content that is logical, accurate and complete, appropriately presented for the client.

Substantive editing

Substantive editing should take place after the proposal team have completed working drafts of proposal sections. This step can be valuable if the writers of the sections have expertise in a certain area but lack writing experience.

Generally, a substantive editor will:

- * Analyse a document's structure and content
- * Reorganise a document to give it a logical and easy-to-follow structure
- * Write win statements and section summaries
- * Condense and combine sections where needed
- * Ensure graphics visually capture the concepts described in the document
- * Consult with the original writer to ensure integrity of meaning.

Substantive edits focus on content. Whether or not a substantive edit is used, original written material should be given a copy edit.

Copy editing

Information read by your client base simply has to be consistent and free of errors. Copy editing gives your document precision, consistency and polish. During the life cycle of a proposal, copy editing is usually performed after the final review.

A copy editor will complete the following tasks:

- * Correct errors in spelling, punctuation, grammar and sentence structure
- * Ensure parallel construction in sentences and lists
- * Apply consistent use of numbers, abbreviations, acronyms and capitalization
- * Confirm graphics are appropriately placed and numbered
- * Eliminate unnecessary wordiness
- * Rewrite awkward text to improve readability
- * Suggest improvements in logical construction or organisation.

The very nature of proposal documents means that right up until the last minute team members may need to alter text. We provide an extra proofing stage to scrutinise your documents one final time to catch any lapses in spelling, grammar and punctuation.

services | layout & design



Well-written words may be the most important element of your proposal, but a well-structured and attractive presentation will help persuade and impress your client.

Attractive page layout and good graphics are vital for clear and lasting concepts. Good typography enhances readability. By combining these techniques to suit your client, we will increase your chances of winning. As expert users of Microsoft Word—and other industry-standard publishing tools—we create a professional and attractive document that meets your corporate standards and appeals to the client.

Typically, at a minimum, we will:

- * Apply template style and format to text
- * Create styles for paragraphs and head levels
- * Produce or standardise graphics
- * Ensure consistent pagination, margins and alignment
- * Generate contents table and index, where required
- * Format tables, bulleted and numbered lists
- * Improve overall presentation and flow of the document.

While most proposals and documentation are required as printed ‘hard copy’, clients frequently require electronic versions of documents—commonly ‘pdf’ files on CD, via e-mail or uploaded to a web site. Well thought-out layout and design allows easy and secure conversion into all electronic formats.

Our professional approach to layout and design is a natural link to effective printing, packing, and despatch, to suit your requirements and those of your clients. Our confidential service extends to archiving your electronic files and helping you transfer knowledge to your staff for ongoing efficiency and information sharing.

services | management



Proficient document management is the foundation of xertion's service. Our clients know they can rely on expert advice, support and the highest degree of confidentiality. Our skills extend to all forms of corporate documentation—from sales proposals and external reports to marketing material and user guides.

From the outset, we involve ourselves in a number of vital activities, according to our clients' needs:

- * Develop documentation strategy and process—devise outlines and plan
- * Create Microsoft Word template designs for current and future proposals
- * Coordinate activities between subject matter experts, writers and editors
- * Organise regular draft reviews and manage changes
- * Oversee final print production, document collation and electronic versions
- * Perform quality check on materials before submission
- * Establish re-usable text and graphics archive
- * Create procedures, templates and tools for writing 'off-the-shelf' proposals
- * Transfer proposal support knowledge and techniques to your employees.

xertion combines hands-on specialist documentation skills with assured information management for all situations and environments.

To find out more about what we can do for you, call or write to us today at:

xertion limited
1 Thames Street
Weybridge
Surrey KT13 8JG
07814 788057

info@xertion.co.uk

