

Industrial Project Management IEIM 6004

Proposal Template

1. Cover Page

Reference No: 012345

Title: ABC System

Proposal to the Buying Agency of XYZ Company
Contract Reference: 012345



An attractive illustration

Date:

Company Logo/ Name

2. Proposal Details

Title: ABC System

Customer: XYZ Company

Customer Reference: 012345

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This proposal is submitted by AAA company plc in response to the Invitation to Tender issued by the Buying Agency of XYZ Company dated 9 September 1999. It may not be used for any other purposes, reproduced in whole or in part, nor passed to any organisation or person without the specific permission in writing of the Commercial Manager, AAA plc.

Validity: 90 days

File Reference:

Reference Number::

Own company name and address, telephone, fax and email, etc.

AAA Company is certified to ISO 9001

Proposal Manager:

Approved by:

3. Executive Summary

A brief and focus description of the overall proposal, highlighting the theme, the company, the project team, their strengths, track record, the solution, deliverables, key advantages and features that distinguished from competitors.

For example:

AAA Company has great pleasure in submitting a proposal to the Buying Agency in response to the Tender ...

AAA Company will provide a multi-disciplinary team with expertise in each of the areas critical to the success of ...

We have skill in areas ...

We have clear understanding of the requirement set out by ... and our own ability to provide effective Project Management to offer a complete solution which will meet customer's requirements, and will provide means of achieving major cost savings ...

We will integrate proven technologies to ...

The design will be based on modular approach ...

The proposed solution by AAA Company uses a combination of tried and tested sub-systems ...

AAA Company is therefore confident that the proposed approach will provide a reliable and efficient system, which will significant improve, on a time-scale and to within a budget that can be agreed and achieved.

4. Content

Introduction

- Understanding of requirement
- Specific approach to meeting the requirement
- Specification compliance matrix

Technical Proposal

- Introduction
- Goals
- Approach
- Scope
- Detail description of supply
- System performance criteria
- Standards
- Maintenance
- Training programme
- Dependencies and technical risks

Management Proposal

- Management arrangement
- Work package description
- Programme
- Quality management
- Safety management

Commercial Proposal

- Introduction
- Price
- Payment schedule
- Delivery
- Terms and conditions
- Returnable schedule

Appendix

- QA certificates
 - CV of major project team members
 - Major equipment specification and data sheets
-

Introduction

Understanding of Requirement

- An analysis of the current situation
- To demonstrate to customer that company has good understanding of the situation
- Provide justification to the solution

Approach to Meet the Requirement

- The solution
- Its characteristics, strength, benefits, novelty, ...
- What is the solution?
- What is the system consisting of?
- The overall design
- The major deliverables

Specification Compliance Matrix

To cross reference the requirement define by the customer specification set out in the RFP or ITT to the proposed solution.

For example:

Customer Spec. Para No.	Contents	Comments	Compliance
<i>1.</i>	<i>Introduction</i>		
1.1	Basis of tender	AAA understands that the tender is issued by ...	Yes, noted
1.2	Installation	The proposed site at XXX has been visited and site test and installation discussed with key staffs	Yes, noted
<i>2.</i>	<i>Scope</i>		
2.1	Total scope	AAA proposal covers supply of all specified ...	Yes
<i>3.</i>	<i>Standards</i>		
3.1	QS14000	All equipment supplied will meet the standard	Yes
<i>4.</i>	<i>Requirement</i>		

Technical Proposal

Introduction

Goals

The major achievement of the project that satisfies the request

Approach

The approach to achieve the success, e.g., to use off-the-shelf components to minimise new development, based on past experiences, and knowledge in the field.

Technical Description

Description of the system, process with diagrams, flow charts, etc.

Scope

Scope may cover supply, delivery, installation, commissioning, calibration, training and maintenance of the product.

A list of deliverables may help.

Detailed Description of Supply

A structured description of the major technique, design, system configuration, sub-systems, functionality, parts and components, operational and maintenance manuals, international standards (CE, Q, etc.), installation, training, etc.

System Performance Criteria

State the critical performance figures

Standards

List the standard adopted and complied

- ISO9000, ISO14000, ISO9001, etc.
- The Management of Health and Safety at Work Regulations (1992)
- Health and Safety at Work Act (1996)
- The IEEE Electrical Wiring Regulations (1993)
- The Provision and Use of Work Equipment Regulations (1992)
- The Control of Substances Hazardous to Health Regulations (1988)
- BS5304 (1988) Safety of Machinery

Maintenance

State the routine maintenance schedule and special requirements

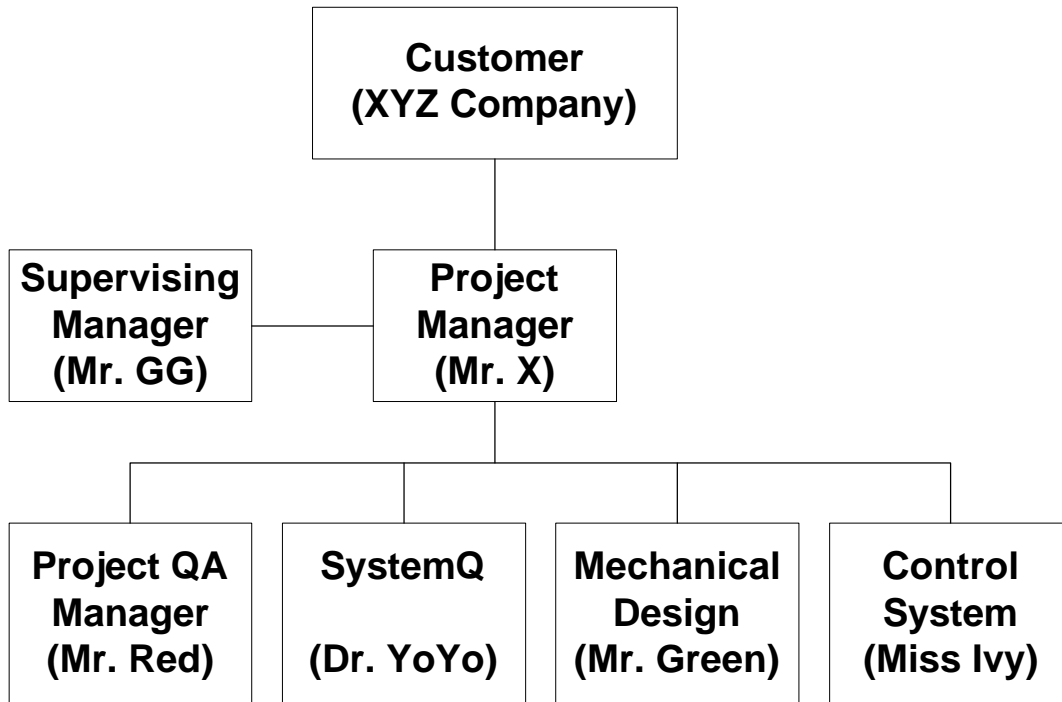
Management Proposal

Management Arrangement

A Project Team assembled primarily from our own company with a major sub-contractor undertaking the software work will carry out the work.

Mr. X has been nominated as Project Manager. Mr. X will be accountable for delivery of the project, having full authority over the necessary resources, and will be the formal contact for the work.

A brief structure of the Project Team may be useful



Work Package Description

AAA Company will manage the project using the best practice Project Management techniques to ensure that the work can be carried to cost and schedule. As part of this exercise, the project has been broken down into a number of distinct work packages, which will enable progress to be monitored effectively. The work breakdown structure will also be used as the basis for defining milestones against which payments for progress during the project would be made.

For example:

Item	Title	Description
WP1	Q System modeling and specification	Design, simulation and modelling of the main system components to verify layouts, hardware specification and requirement.
WP2	Software requirement specification and code	<ul style="list-style-type: none"> • Operator interface specification, design and code • Control software design and code
WP3	Hardware design	Detail design of: <ul style="list-style-type: none"> • Control room • Tool mounts • Interlocks control • Tool racks • Jigs • Other associated mechanical units
WP4	Hardware procurement and assembly	Procurement of hardware: <ul style="list-style-type: none"> • Robot • Tool change unit • Tools Mechanical assembly of hardware
WP5	System integration and test	Integration of hardware and software at factory. Preliminary testing of the functionality of the system with respect to customer requirement.
WP6	System demonstration and customer training	<ul style="list-style-type: none"> • Demonstration and acceptance testing of equipment at factory. • One week training for 10 groups of

		10 trainees. <ul style="list-style-type: none">• One week extra training for supervisors
WP7	System installation, commissioning and handover	Final system testing, acceptance, delivery, installation, commissioning and handover to customer.

Programme

A high level GANTT chart here will serve the purpose.

Quality Management

AAA Company operates Quality Assurance Systems based on the requirements of BS EN ISO 9001 1999.

Outline major activities, procedures, roles and responsibilities of PM and other team members

Safety Management

- Responsibility – declare
- Health and safety policy

Commercial Proposal

Introduction

Outline commercial agreements between customers and contractors

Price

State the total price, say 100 million HK dollars for the scope defined by the proposal. State also the price is subject to authorisation to proceed being received no later than 1st April 2050.

The price is subject to payments as described in the payment schedule with payment terms of 28 days from receipt of invoice.

Payment Schedule

A tabulated schedule will be useful.

Work Package	Title	Milestone	Payment	Deliverables
WP01	Product Specification	WP01M1	\$100,000	Hardware specifications, requirement & design drawings, approval of project and QA plans
WP02	Parts procurement	WP02M1	\$230,000	All necessary parts order and delivered to factory
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WP100	Product delivered	WP100M2	\$5,000,000	All batch of product received in good order

Delivery

Delivery schedules, dates, where, who, etc.

Terms and Conditions

State the terms and conditions, can refer to the appropriate contract sections.

Returnable Schedules

Related document issued from the customer that need reply or filled in.

Appendix

- QA certificates
- CVs
- Previous jobs profiles
- Major hardware/software specification
- Company/ sub-contractors company information