

Forms2Docs Proposal

for Acme Corporation

Prepared by: Ron Mouw

11-14-2022

John Doe
President
Acme Corporation
100 Main St
Chicago, Illinois 60512

Thank you for considering Forms2Docs by Paperwork Pros, Inc. Feel free to learn more about Forms2Docs at www.Forms2Docs.com.

Below are the **Paperwork Pros Brand Promises**. If we are fortunate enough to earn your business, we will deliver based on these promises.

- ✓ To treat you consistent with the teachings of the Bible.
- ✓ To have quality people provide quality work.
- ✓ To provide quantifiable benefits to your business.

This proposal includes the following sections:

- ✓ Project goals
- ✓ Project summary & details
- ✓ Proof-of-concept
- ✓ Subscription fees
- ✓ Professional services
- ✓ Unknowns & potential challenges
- ✓ Diamond Risk Elimination

This proposal expires on 12-31-2022.

Please let me know if you have any questions.

Regards,

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Project goals

Based on our previous discussions, below are the Forms2Docs project goals for Acme Corporation.

- ✓ To help you serve customers better!
- ✓ Impress your customers by creating and turning around documents, lightning fast.
- ✓ Use automation to dramatically reduce the manpower it takes to produce your important business documents.
- ✓ Improve the consistency, quality, and professionalism of your documents.
- ✓ Allow customers a way to self-serve on their own time and in a way they prefer.
- ✓ Leverage the capturing of business, product, and/or pricing rules to free up bottlenecks and reliance on subject matter experts in your company.
- ✓ Eliminate delays from having incomplete information and rework due to error.

Project summary & details

Project summary

This project includes using our Forms2Docs document configuration platform to automate to creation of your important business documents.

Project details

Below are the project details based on Paperwork Pros' current understanding.

- ✓ Acme Corporation lacks a formal, consistent process to gather client information and then produce the needed business document.
- ✓ Acme Corporation's current approach to this process is time-consuming and manual.
- ✓ Acme Corporation personnel use physical or email mailings to present questionnaires to clients. Questionnaires are inconsistent and lack rules and logic to guide clients through which details are necessary for inclusion in the business document.
- ✓ Acme Corporation lacks a centralized knowledge-base for business document wording as well as rules/logic defining the conditions for what wordage are to be included and where in the business document.

Proof-of-concept

Paperwork Pros is very happy to build a “proof-of-concept” using the Forms2Docs platform. The proof-of-concept won’t be a complete project but will show the practical capabilities of the Forms2Docs platform in relation to your business.

The price of the proof-of-concept: No-Charge

The focus of the proof-of-concept: Acme Corporation's ABC business agreement document.



Subscription fees

Forms2Docs is offered on a software-as-a-service (SaaS) model and is hosted at Amazon Web Services (AWS).

SUBSCRIPTION	PRICE
Subscription fee for core Forms2Docs SaaS Services	\$2000 per month
Form Builder 2 named user(s)	\$200 per month
DISCOUNT:	(\$200 per month)
DISCOUNTED SUBSCRIPTION FEE:	\$2000 per month

The subscription includes unlimited named user licenses of Forms2Docs for your company's business operations.

We commit to not raising the annual subscription fee by more than 2% for the next three years.

Professional services

We believe that technology solutions are the combination of software and people. Having the right platform is important but having the right partner to guide and support you is vital.

We will blend our Forms2Docs document configuration platform with our outstanding professional services to ensure complete success of your project.

As a special offer, we will provide Acme Corporation the professional services listed in the table directly below. These services are likely everything you need to get your first Forms2Docs template live and providing value to Acme Corporation. Paperwork Pros and Acme Corporation will work in partnership to determine the scope of this first Forms2Docs template. Although we will shoulder the work listed below, Acme Corporation is responsible for the following:

- ✓ Communicating both the Forms2Docs form rules and document template rules for the scope of this first template.
- ✓ Provide Paperwork Pros with a word version of the final document that we can use as a starting point.
- ✓ Doing the final testing of this first Forms2Docs template prior to Go Live.

PROFESSIONAL SERVICE	PRICE
Project kick-off meeting	No charge
Project management for 1 st Forms2Docs template	No charge
Setup of 1 st Forms2Docs rule-based form	No charge

Setup of 1 st Forms2Docs rule-based document	No charge
Setup of user roles and workflow	No charge
Help with rollout of 1 st template to end users	No charge

In addition to the free services listed above, Paperwork Pros recommends the paid services below.

Our services for this project will be billed on a time and material basis at a rate of \$1500 per 8-hour day (\$187.50 per hour).

PROFESSIONAL SERVICE	ESTIMATED DAYS	FEE
Misc services	1 d	\$1500
Rule-based form implementation services	3 d	\$4500
Rule-based document implementation services	1 d	\$1500
Setup of permissions and workflow	2 d	\$3000
Training services	1 d	\$1500
TOTALS:	9 d	\$13500

Service hours listed above are an estimate.

Payment Terms

Subscription Fee Terms

The monthly subscription fee for Forms2Docs SaaS Services is:

- ✓ Billed monthly.
- ✓ Invoiced no sooner than 30 days prior to the start of the month that SaaS Services are to be provided.
- ✓ Due net 30 days from invoice.

Professional Services Terms

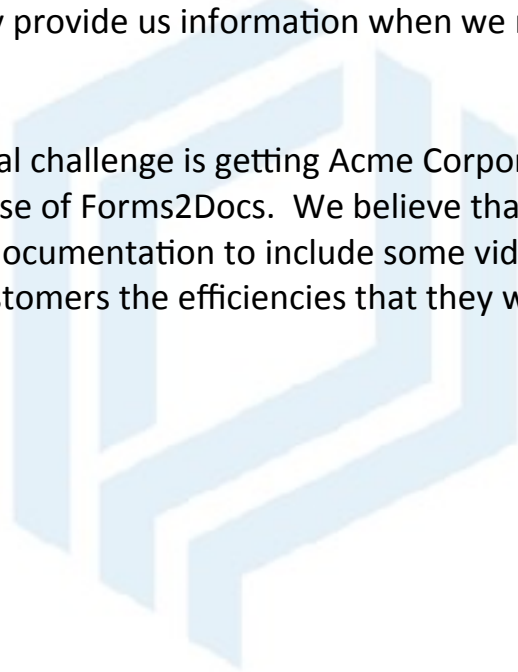
Forms2Docs professional services are:

- ✓ Billed on a time & material basis with a minimum of 1 hour per request.
- ✓ Invoiced at the beginning of each month for the Professional Services that were delivered during the previous month.
- ✓ Due net 30 days from invoice.

Unknowns and potential challenges

Paperwork Pros prefers to identify what we see as the biggest unknowns and potential challenges of the project, upfront in our proposal. This helps our collective team to enter into the project understanding where we may have to put extra emphasis and creativity. For this project, we have identified the following:

- ✓ A potential challenge that we've identified during our project scoping was that Acme Corporation is very busy for the next two months and may not be able to quickly provide us information when we need it to deliver the project.
- ✓ A second potential challenge is getting Acme Corporation's 1500 customer to embrace the use of Forms2Docs. We believe that we can overcome this by emphasis on documentation to include some video's explaining to Acme Corporation's customers the efficiencies that they will gain.



Diamond Risk Elimination

We want to make it easy for companies considering Forms2Docs to give us a try. The main way we do this is through our “Diamond Risk Elimination”. Here are the four ways that we will eliminate risk for Acme Corporation:

- ✓ **Our 90-day brand guarantee:** If you’re not satisfied with Forms2Docs, you can cancel at any time, and we’ll refund you the past 90 days of our subscription fees.
- ✓ **Our experienced people:** If there is one aspect that sets us apart from other software companies, it is our people. Many of us have decades of knowledge about both rule-based systems, document configuration, and how automation is best leveraged by organizations.
- ✓ **Our brand promises:** Our brand promises are derived from Paperwork Pros’ core values and we will never compromise on these. Our brand promises are:
 - To treat you consistent with the teachings of the Bible.
 - To have quality people provide quality solutions.
 - To provide quantifiable benefits to your business.
- ✓ **Free services for proof-of-concept:** We know that organizations have little time to implement software, even in cases when the software will strategically impact your bottom line. To minimize your risk and allow you to see proof that our software and people are the right solution for your company, we’re happy to create a detailed proof-of-concept using your data.

Final proposal notes

Please let us know if you have any questions on this proposal. We have appreciated all of the time that Acme Corporation has spent to educate us on your current client questionnaire and document creation process.

**Thank you again for considering Paperwork Pros and our
Forms2Docs document configuration platform!**

