Project Folders:

Updating and Adding Missing Information to Increase Usability

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Date: December 6, 2015

To: John Smith

              Field Services Manager

From: Alyssa Kieffer, Customer Service Manager of Store #0000

Subject: Proposal for New Project Folders in Stores

Purpose

The purpose of the proposal is to request approval to update and create new project folders for use in stores, specifically in Store #0000.

Summary

Stores currently have project folders that can be used by the employees to assist them with computer sales. It provides questions for the employee to ask the customer to help them learn about their current needs so they can formulate recommendations, along with a large area for writing notes. This space can used for writing customer information, writing down the employee's recommendation to present to the customer, or any other notes that need to be recorded. Overall, the folder is a very useful selling tool and promotes sales. The following page has an example of the current "New PC Services" page.

Example of the "New PC Services" page of the current folder:

New PC Purchase Information:

Who will be using the PC? ....

What will you be using the PC for? ....

How did you setup your previous PC? ....

What version of Office do you currently use? ....

Will you be traveling with the PC? ....

How do you currently backup your data? ....

The folder is lacking useful information that could make selling easier and more effective for the employees. The folder currently does not include any information about the services that we offer, no pricing, and lacks a defined space for customer information that we need to fill out service requests. This information can be found on various brochures and literature around the store, but that requires my employees to search out the information if they do not have it committed to memory. When they go to search for the information, this involves them having to leave the customer in the aisle while they go look. Rapport and confidence is lost when the employee has to say that they do not know the answer. It can be viewed as poor customer service. This can also make the customer feel that their time is being wasted because when they come into our store, they expect the employees to know what they are talking about and what they are selling. When this disconnect happens, sales can be lost. Recommendations should be able to be made immediately after the employee learns vital information about the customer's situation and needs.

I request that the folder be updated to include this useful information so that the employees can confidently and effectively make recommendations to our customers. When our employees can sound confident in their recommendations, customers are more likely to listen to them and follow through, resulting in higher sales. We will be providing better customer service which will help build customer loyalty and satisfaction, and this is will result in the customers come back to our store because they know they will receive excellent service. Current Folder

Proposed Program and Objectives

The program involves multiple tasks to achieve the end result of the updated folder.

A. Research Current Services

I have already begun gathering the necessary information to be included in the folder. I will need to utilize the company intranet to ensure that I have all of the current services that we offer, their descriptions, and their pricing. I will also need to identify what information we need to gather from the customer to make our service requests, so there can be a space specifically for that information, creating less confusion when filling out the service requests.

B. Reformat Current Template

Next, I will need to adjust and reformat the current template for the folder to include the new information. I can utilize Microsoft Publisher and Adobe InDesign to accomplish this. If needed, a new folder template can be created if I cannot obtain the current one.

C. Insert New Information

Then, I will need to insert the new information. Included in this will be checks for accuracy, in terms of pricing and description of services. The next page includes an example of what the "New PC Services" page could look like including some of the missing information.

Example of New PC Services Page:

New PC Purchase Information:

Who will be using the PC? ....

What will you be using the PC for? ....

How did you setup your previous PC? ....

What version of Office do you currently use? ....

Will you be traveling with the PC? ....

How do you currently backup your data? ....

New PC Setup Services

Premium Setup and Protection ($79.99)
Optimization to maximize PC performance by adjusting startup settings, remove trialware, check for updates, and install McAfee LiveSafe (1 year sub.)

Platinum Setup and Protection ($99.99)
Includes Premium Setup package, Configure LiveSafe on additional devices, install MSOffice software (software sold separately, and 90 days of phone and online support

Platinum Plus Setup Collection ($139.99)
Includes Platinum Setup Package, Choose One:
☐ Carbonite Online Backup
☐ Lojack for Laptops Security
☐ Rosetta Stone Language
☐ Dragon Naturally Speaking

Data Transfer ($39.99)
One time transfer from one PC to another

Recovery Media ($39.99)
Creation of media to restore PC to factory condition

Protection Services

Desktops

	3 Year Service		2 Year Service
$0-$499.99	$119.99	$0-$499.99	$89.99
$500-$699.99	$139.99		

Laptops

3 Year Service		2 Year Service	
$0-$399.99	$149.99	$0-$399.99	$99.99
$400-$499.99	$179.99	$400-$499.99	$129.99
$500-$699.99	$199.99	$500-$699.99	$159.99
$700-$999.99	$279.99	$700-$999.99	$199.99

Microsoft Office

All Microsoft Office software is $20 off with purchase of a new PC

Microsoft Office software installs are $9.99 with new computer, unless included in set up package

Other Services/Accessories

....

....

....

....
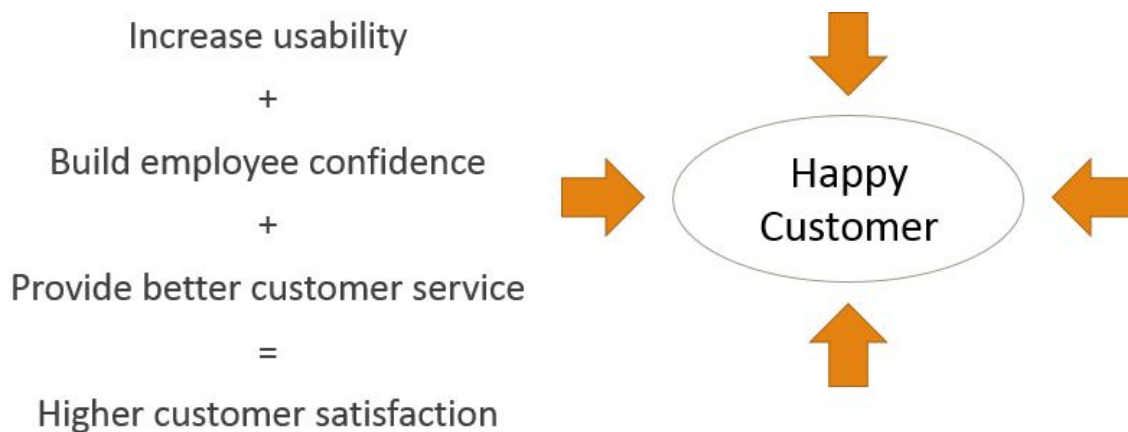
Total:_____

D. Submit for Approval

I will submit the folder for approval by the John Smith, the Field Services Manager.

E. Produce Folders

After approval, I will begin production of the folders. I will be using 11x17, 24# paper with full color on both sides, same as the current folders. I will produce enough to begin a pilot run at the store, and a digital copy will be saved for future production.
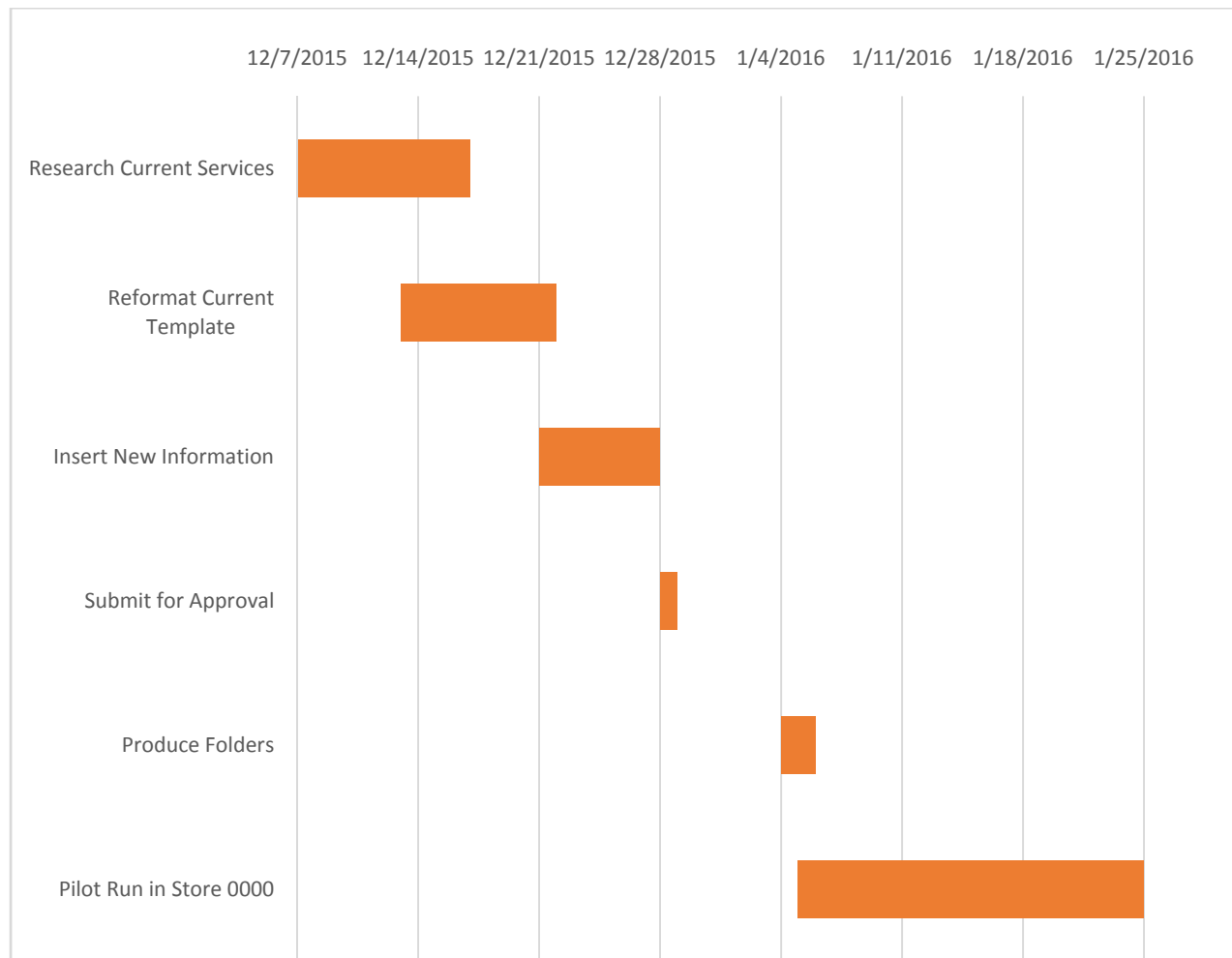
F. Pilot Run in Store #0000

I will perform a pilot run in Store #0000 to test usability and effectiveness of the new folders and their updated information. I will train the employees on using the new folders, and will retain them for review. Each folder will be reviewed by myself and the employee who utilized to discuss usability. At the end of the pilot run, a report will be created with the results.

Increase usability

+

Build employee confidence

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Provide better customer service

=

Higher customer satisfaction

Happy Customer

Activities and Tasks Timeline

	12/7/2015	12/14/2015	12/21/2015	12/28/2015	1/4/2016	1/11/2016	1/18/2016	1/25/2016
Research Current Services								
Reformat Current Template								
Insert New Information								
Submit for Approval								
Produce Folders								
Pilot Run in Store 0000								

Budget

Item	Cost ($)
Employee's Time	300
Printing	100
Total	400

Qualifications and Experience

Alyssa Kieffer is the Customer Service Manager in charge of technology services at Store #0000. She has been employed at the company for over 8 years, specializing in technology. She is currently pursuing a Bachelor's in Technical Communication and Professional Writing She has successfully completed an internship as a Technical Writer, specializing in customer-facing document design for a company this past spring. She is proficient in use of Adobe and Microsoft products for document creation.

Audience Analysis

The audience for this proposal is John Smith, the Field Services Manager for my store's district. He is a member of our corporate office who would approve usage of the updated folder in my store. He is college educated with a degrees in business and marketing. He has worked for our company for many years, both at the store-level and the corporate-level.Part of his job involves ensuring that we are using all of the tools provided to us to make our sales and, ultimately, delight our customers, which is why he is receiving the proposal to approve. Mr. Smith's attitude toward the subject is favorable because updating the folder to assist our employees will help facilitate meeting his goals for our store.His attitude toward myself is neutral, as we have only communicated through email and brief phone calls. He will expect this document to be well organized and well thought out because if it does not contain enough detail, it may be viewed as ill use of company time.

References

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