



2019 User Conference
INFORM. EDUCATE. INSPIRE

***How Good is Your Word Proposal
Template***



Dick Eassom
Chief Word Officer
Wordman Speaks

“A brand is literally what people say about your business when you’re not in the room.”

Jeff Bezos

BRANDING

Branding

You invest in a custom website, brochures, and other marketing materials, but your proposals don't reflect your brand...

Branding establishes:

- Customer recognition
- Consistency
- Credibility
- Confidence

Branding

So what would your clients say to this?

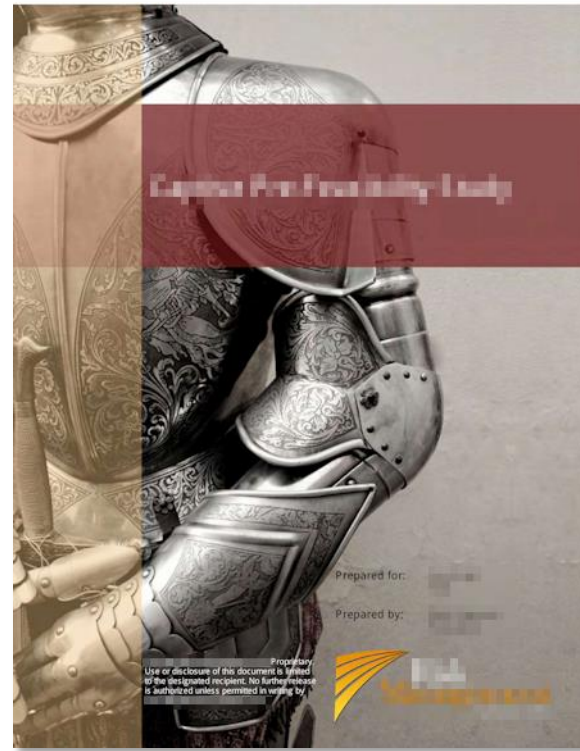


Branding

So what would your clients say to this?



Would this create a better first impression?



Branding

What about this one?

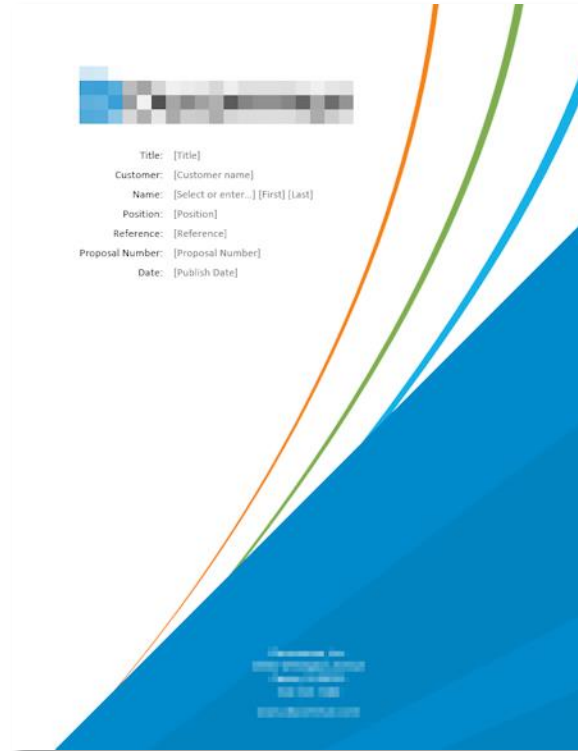


Branding

What about this one?



Is this better?



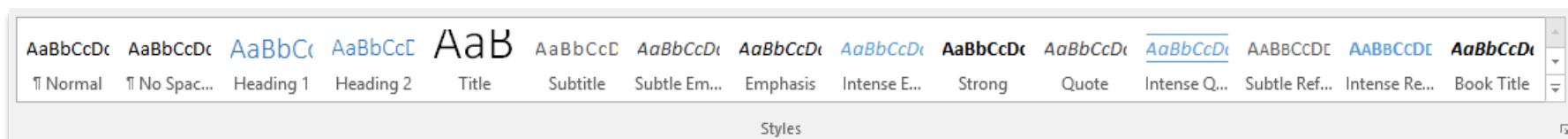
“Consistency is found in that work whose whole and detail are suitable to the occasion.”

Vitruvius

CONSISTENCY AND RELIABILITY

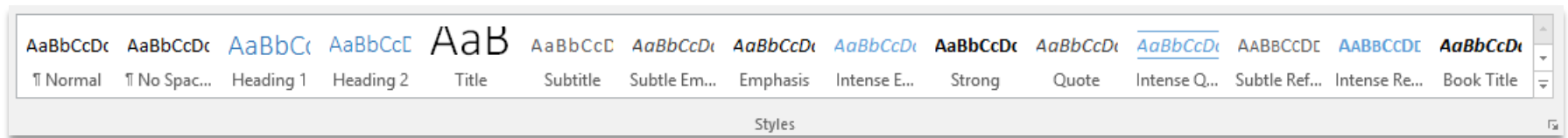
Consistent Formatting

Word templates can define **Styles** for proposal text and table elements. Change the out-of-the-box gallery from this...

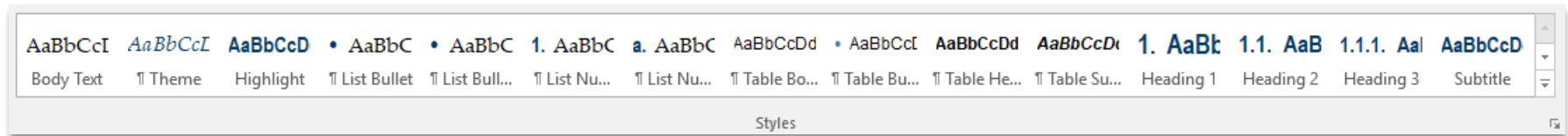


Consistent Formatting

Word templates can define **Styles** for proposal text and table elements. Change the out-of-the-box gallery from this...



...to just the styles you want your writers to use:



Consistent Formatting

Not just within the document!

- Consistent use of styles in all documents in a proposal presents a common “look & feel” across your submission
- Consistent use of styles in all proposals presents your brand: “Ah, an XYZ Co. proposal!”

Reliability

Pre-defined template styles take the guesswork out of do-it-yourself, manual formatting for writers

Pasting in existing content as Plain Text and applying your styles not only creates consistency, it also stops reliability issues when styles conflict

“It’s really clear that the most precious resource we all have is time.”

Steve Jobs

**SAVE TIME, INCREASE
PRODUCTIVITY**

What if you could...

Imagine being able to insert a tabloid or A4 foldout, with all the headers and footers correct, with a single mouse click...



What if you could...

Imagine being able to insert a tabloid or A4 foldout, with all the headers and footers correct, with a single mouse click...



Or a callout box, or an artwork placeholder...

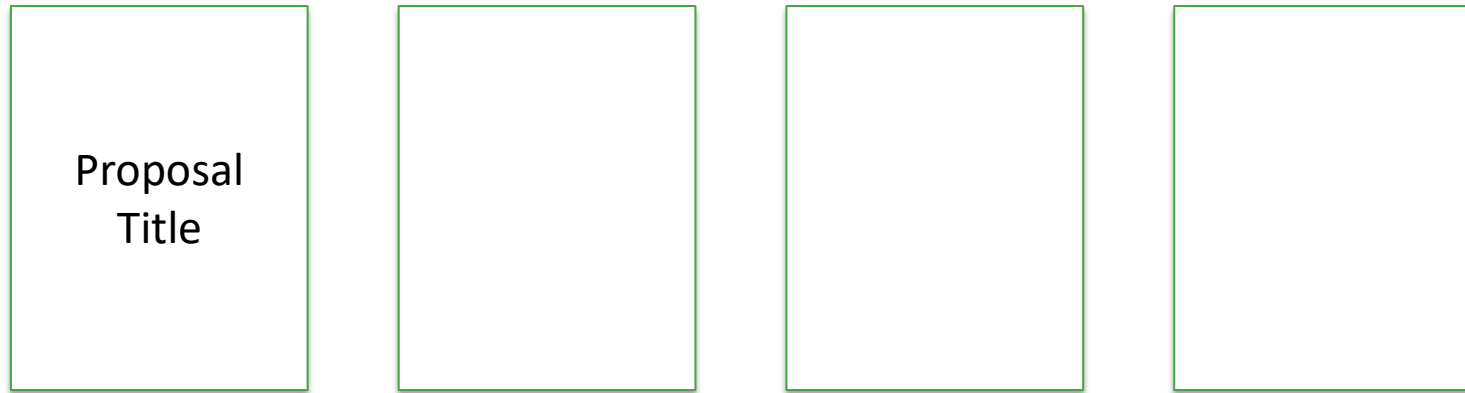
Building Blocks

Word templates can contain **Building Blocks**: reusable chunks of text (and graphics) than can be inserted with a single click, e.g.

- Foldouts or Rotated Pages
- Floating artwork placeholders
- Callout or Focus Boxes
- Signature Blocks
- Standard Company or Product descriptions

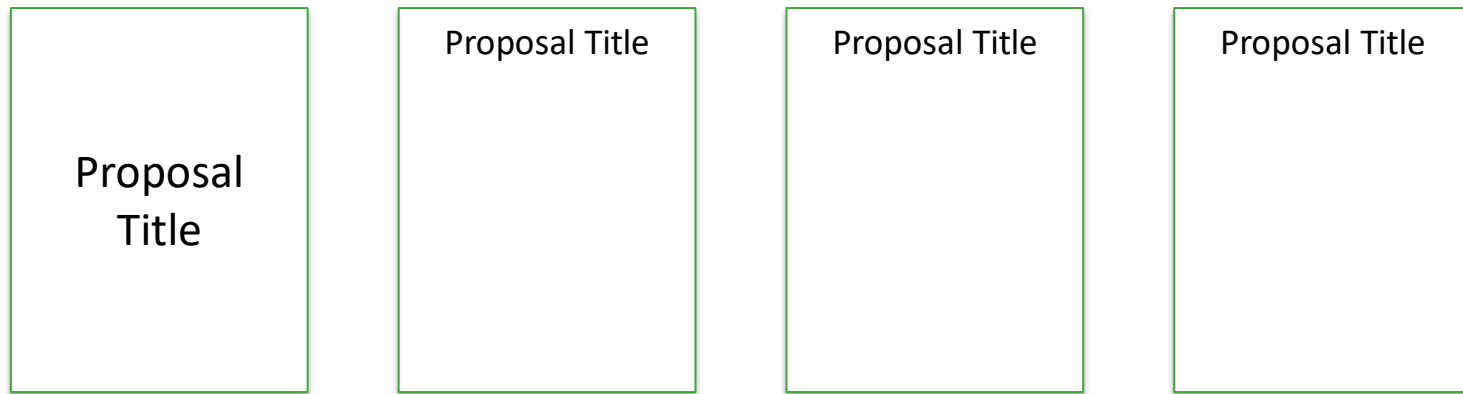
What if you could...

Imagine being able to type the proposal title on the cover page and have it automatically copied into every header in the document...



What if you could...

Imagine being able to type the proposal title on the cover page and have it automatically copied into every header in the document...



Or select the date from a picker and have it automatically copied to every footer...

Content Controls

Word's Content Controls can provide:

- A text box linked to the document's Title property (and every other Content Control linked to that property): cover page and headers in sync!
- A date picker linked to the document's Publish Date property (and every other Content Control linked to that property): cover page and footers in sync!

Content Controls

Word's Content Controls can also provide:

- A dropdown list of choices for the cover letter salutation, e.g. Ms. or Mr.
- A dropdown list to select from a hidden gallery of Building Blocks: choose one signature block for the cover letter from multiple sales leads
- And many more!

What if you could...

Imagine being able to check that all the text in your document is set to the correct language, and that proofing is turned on...



What if you could...

Imagine being able to check that all the text in your document is set to the correct language, and that proofing is turned on...



Or being able to check that heading really is true title case...



With A Little Help From Word VBA

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With a Little Help from Word VBA

More Than a Simple Macro

Word templates can contain VBA code: simple macros enhanced for portability

(and some not-so-simple “macros”!)

Examples:

- Check all figure–caption cross-references are intact
- Check for “banned” words and phrases
- Build an acronym list automatically

Thank you!



Dick Eassom, CF APMP Fellow

Chief Word Officer

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