

Practical Skill 2

Designing Proposal Documents Aligned with a "Customer-Centric" Strategy

July 4, 2025

DSS/ESU/CPC

Hitachi, Ltd.

Solutions to problems with proposal activities

The following are two key points of proposal design that you should follow when confirming with key stakeholders that the proposal will provide value to the customer.

Gather information

- Gather your customers' business goals and issues
- Gather key stakeholders' hot buttons (important interests)

Form a hypothesis

- Organize the strengths and weaknesses of your company and your competitors based on the hot buttons of the project
- Organize your own proposal

Verify

- Present your understanding of the customer first
- Create materials that convey through visual design

Practical Skill

Practical Skill 2:
What is the proposal design required for "the customer's point of view proposals"?

(1) Present your understanding of the customer first

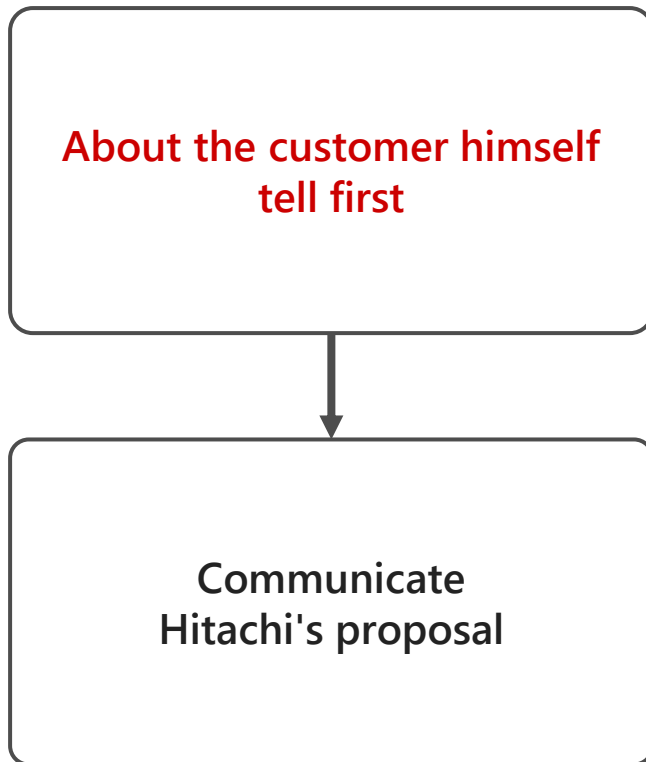
The first is "Elements" and "Orders".

The first place you see in a group photo is yourself.



(1) Present your understanding of the customer first

Show your understanding of the customer's management and business issues, and then tell them that you are proposing a system to solve them.



APMP's BOK (excerpt)

“

When it comes to the order in which you describe your proposal, it's recommended to mention your customers first.

This is to show that the proposal is customer-centric and to show an understanding of their needs and problems.

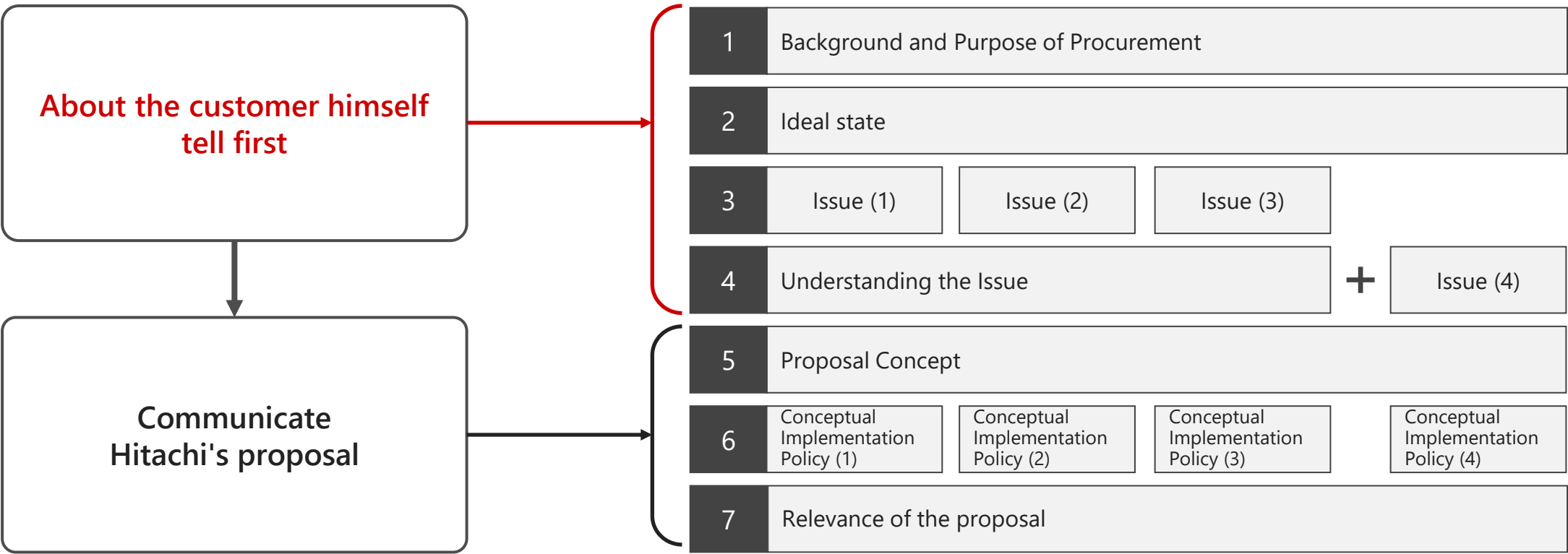
Specifically, it's important to clarify the customer's key problems and needs at the beginning of the proposal and present solutions to them.

This allows you to highlight how your proposition provides value to your customers.

”

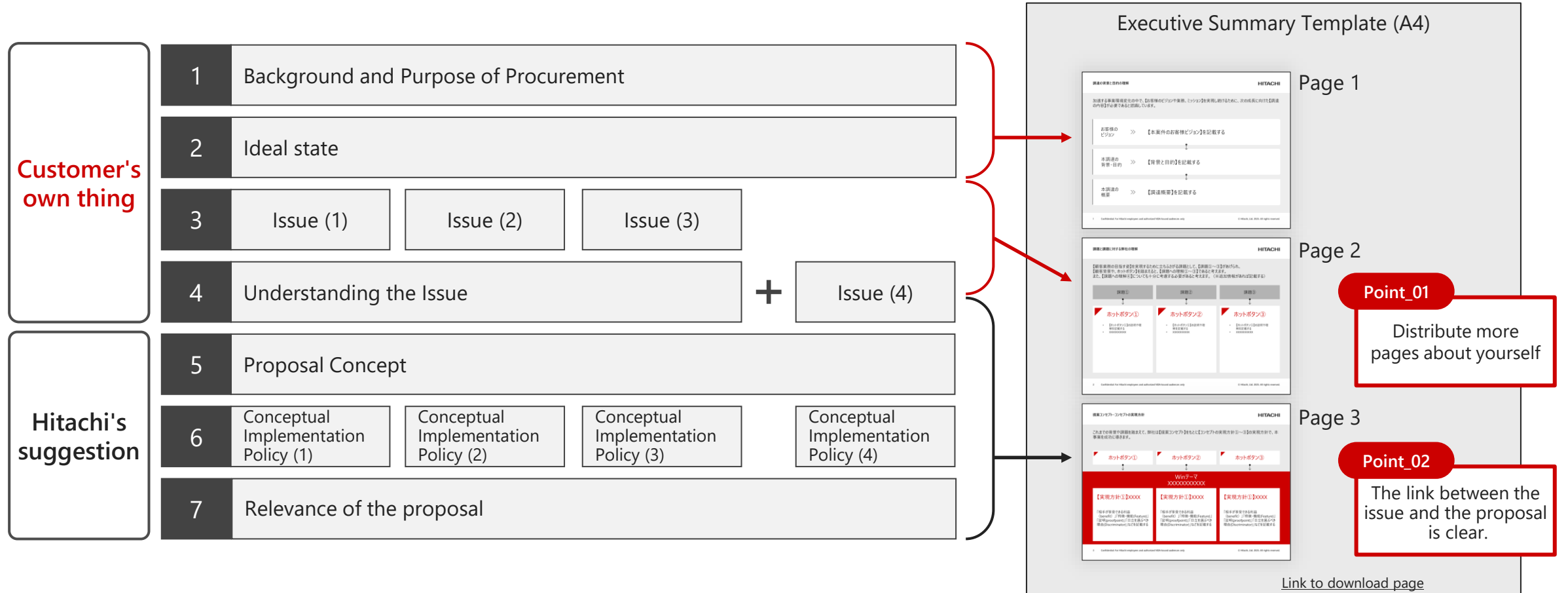
(1) Present your understanding of the customer first

There are types of "elements" and "orders" to convey. You can use this type to "exactly" convey the value that your proposal will give to the customer.



(1) Present your understanding of the customer first

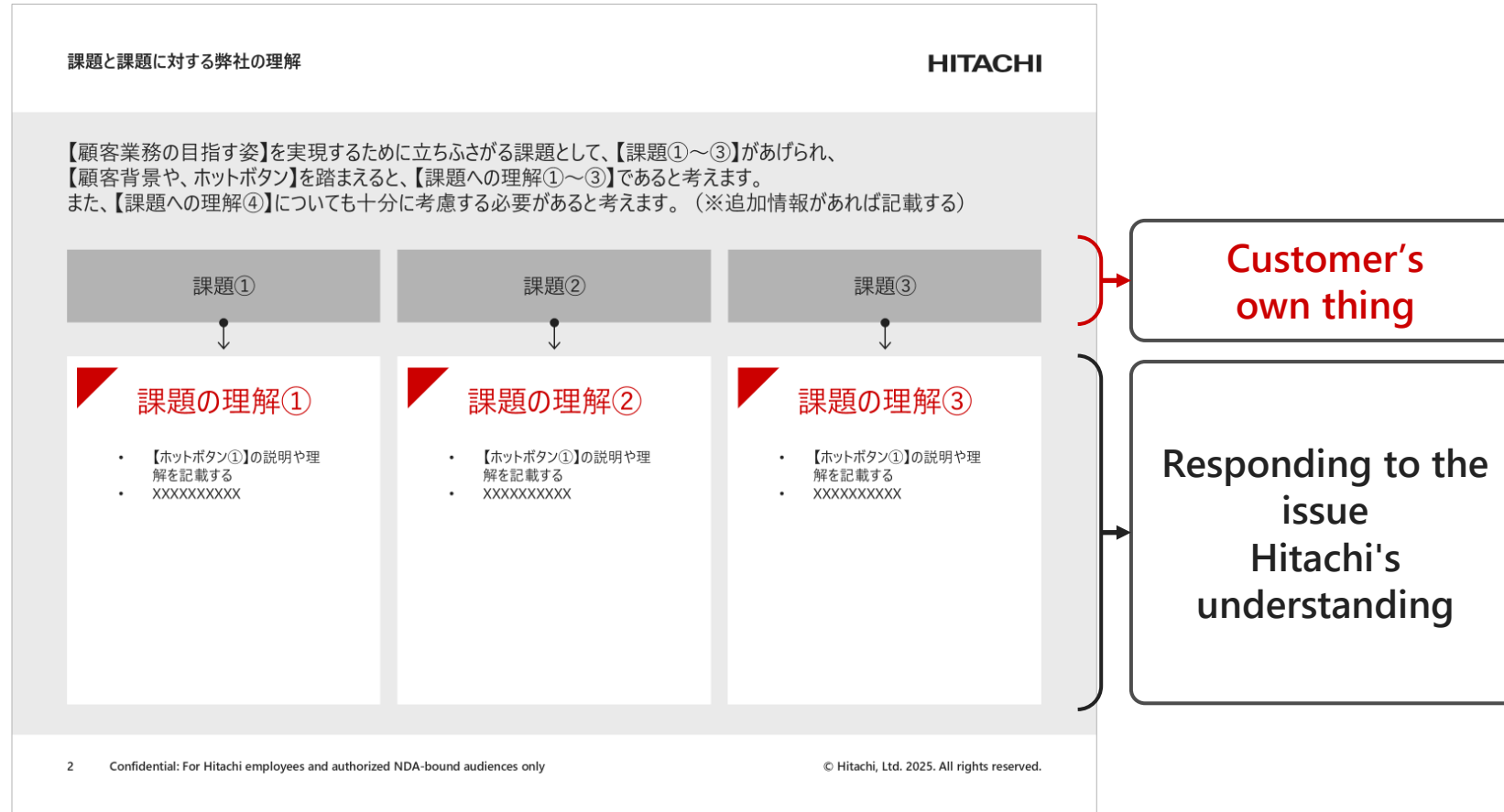
We provide a template with "elements" and "orders" designed in PPT.



(1) Present your understanding of the customer first

Page 2:

Describe the customer's issues and Hitachi's understanding of the issues in a single sheet



Clearly communicate that we are proposing solutions to each of our customers' issues.

[Link to download page](#)

Solutions to problems with proposal activities

We have explained "elements" and "orders".

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- 01 Present your understanding of the customer first
- 02 Create materials that convey through visual design

Practical Skill Practical Skill 2:
What is the proposal design required for "the customer's point of view proposals"?

(2) Create materials that convey through visual design

Explanation of the key points of visual design to convey the value of Hitachi's proposal "Without misunderstanding" and "quickly".

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Form a hypothesis

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- Organize your own proposal

Verify

- 01 Present your understanding of the customer first
- 02 Create materials that convey through visual design

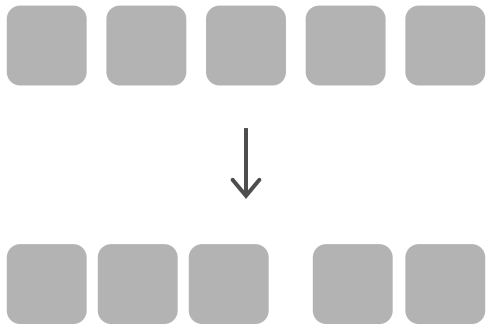
Practical Skill Practical Skill 2:
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(2) Create materials that convey through visual design

The key points to follow are the Four Principles of Design. Communicate the value of your proposal to the client "Without misunderstanding" and "quickly"

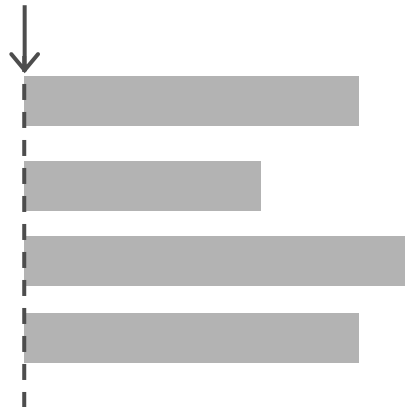
Proximity

Group related elements closer together,
Classify information



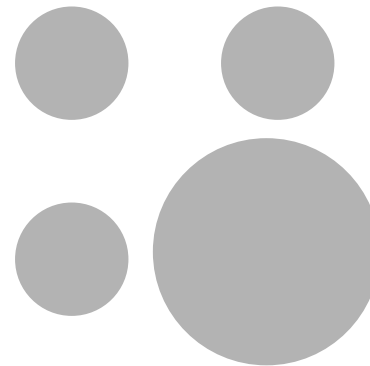
Alignment

Arrange the elements neatly aligned,
Make it easier to see



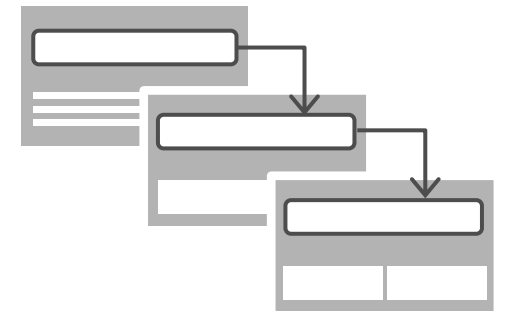
Contrast

Add contrast to the elements
Clarify your priorities



Repetition

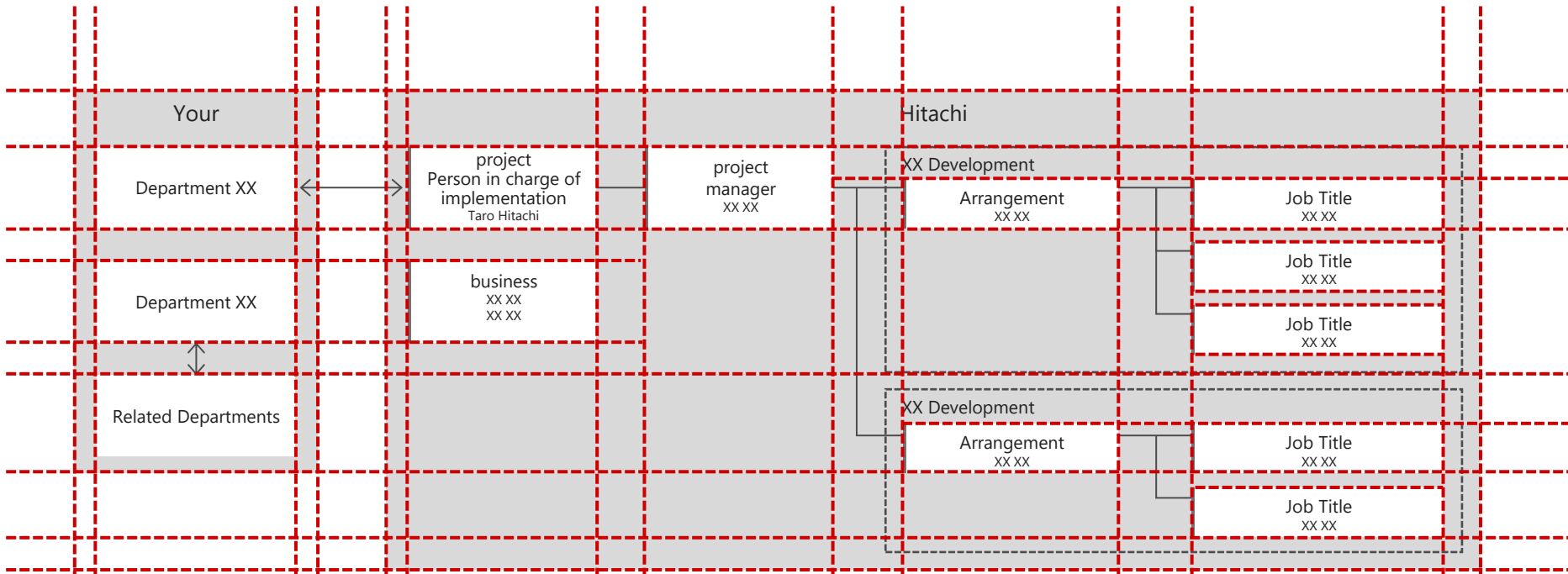
Decide on rules and use the same elements
Make it easier to grasp relevance



(2) Create materials that convey through visual design

Alignment: Align elements neatly and make them easier to see.

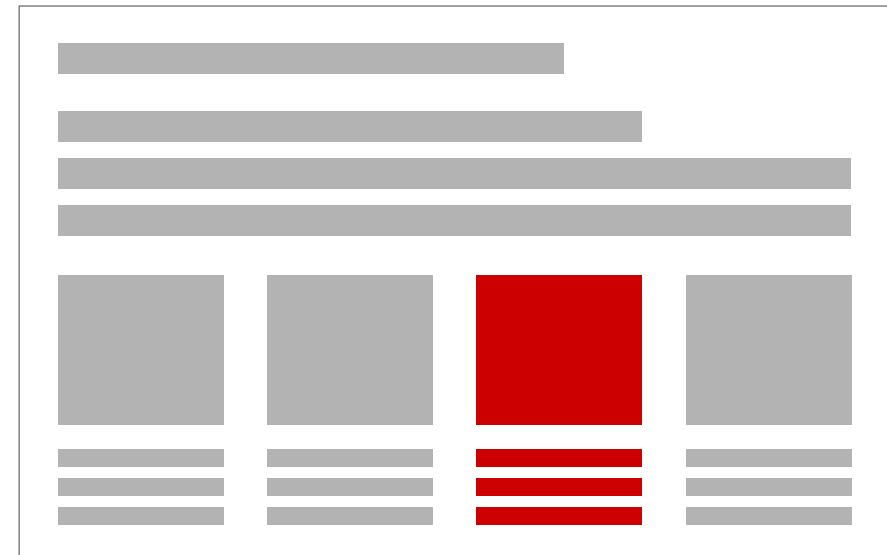
- Align the top, bottom, left, and right lines of an element, and the gaps between related elements with an "invisible line".
- Align with invisible lines as much as possible, and try to avoid increasing lines as much as possible.



(2) Create materials that convey through visual design

Contrast: Contrast elements to make priorities clear.

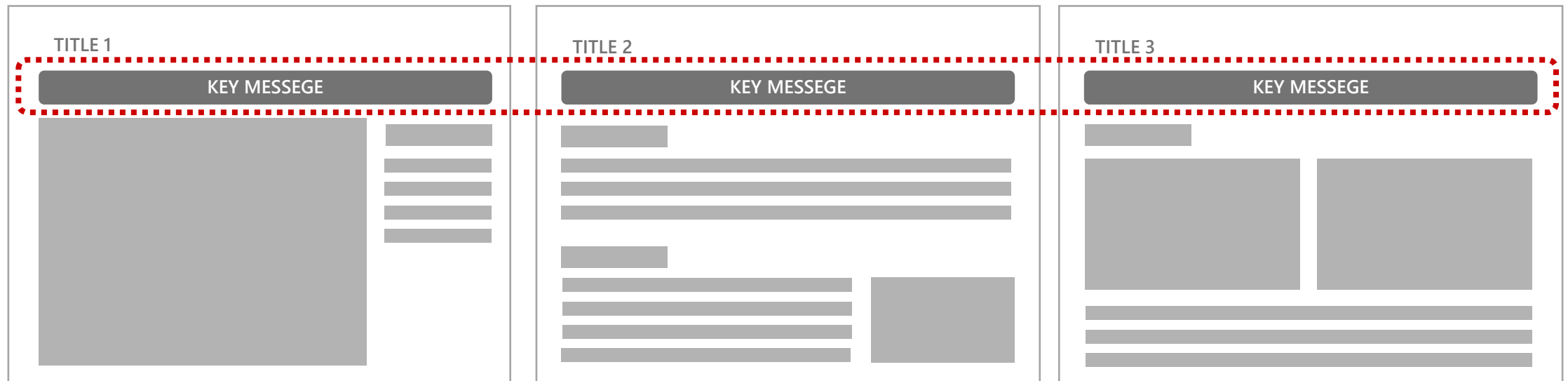
- Strength and weakness are created by making "partial" differences in the paper and making differences.
- Use the difference in size size (jump rate).
- For color emphasis, use chromatic colors or relatively dark colors.



(2) Create materials that convey through visual design

Repetition: Define rules and use the same elements to make it easier to find connections.

- Define rules for the shape (shape, color, font, font size, etc.) and placement of elements, and use them "repeatedly".
- It's important to use the same rules throughout the documentation.



Examples of the Application of the Four Principles of Design to Proposals

(2) Create materials that convey through visual design

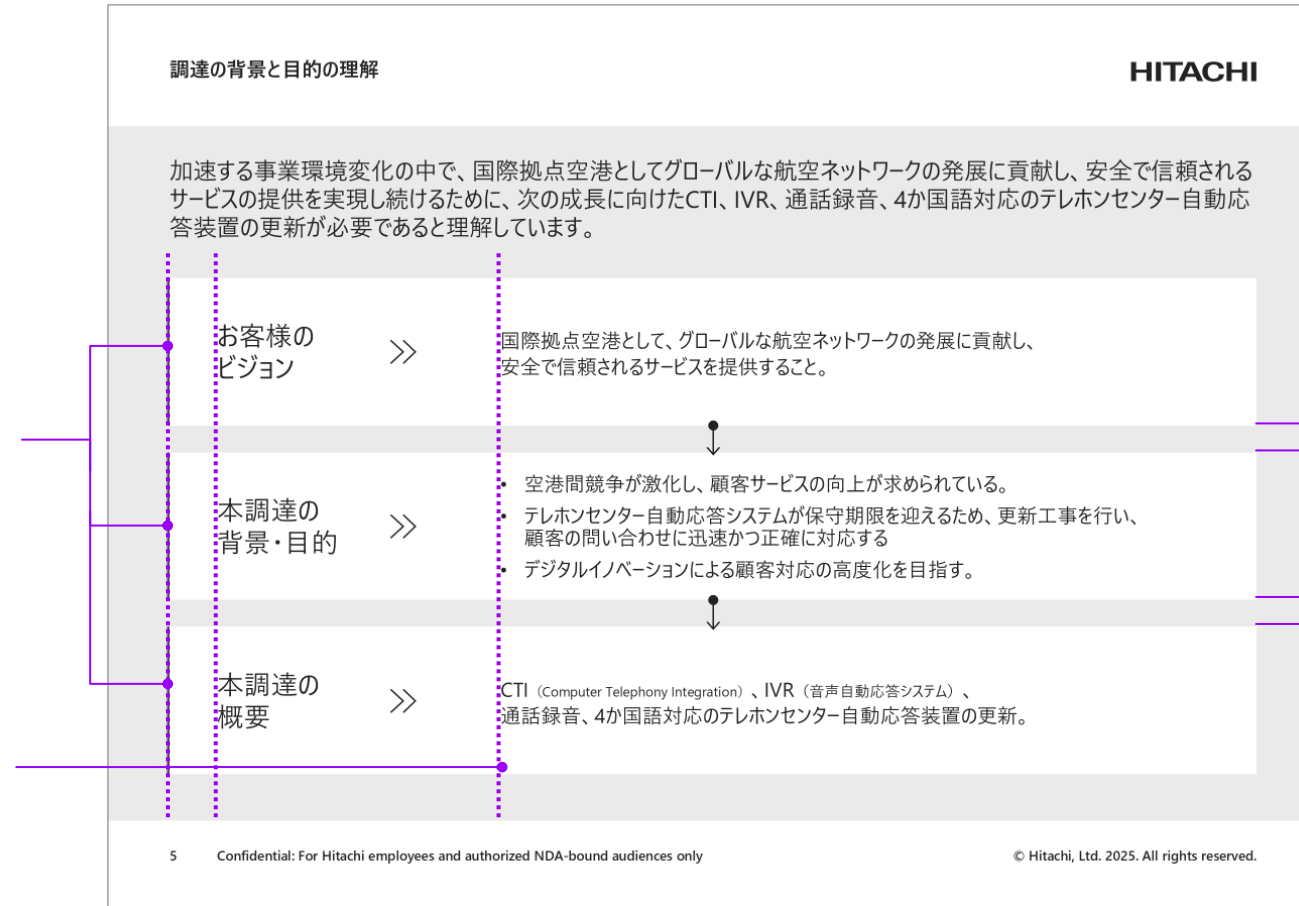
Understanding the background and purpose of procurement : [Alignment and Repetition] Aligning the placement and unifying the overall tone.

Repetition

Repeated use of the same elements makes it easy to intuitively understand how they are related to each other.

Aligned

Aligning the left edges of related elements gives an organized impression. It also makes it easier to understand the connection between elements.

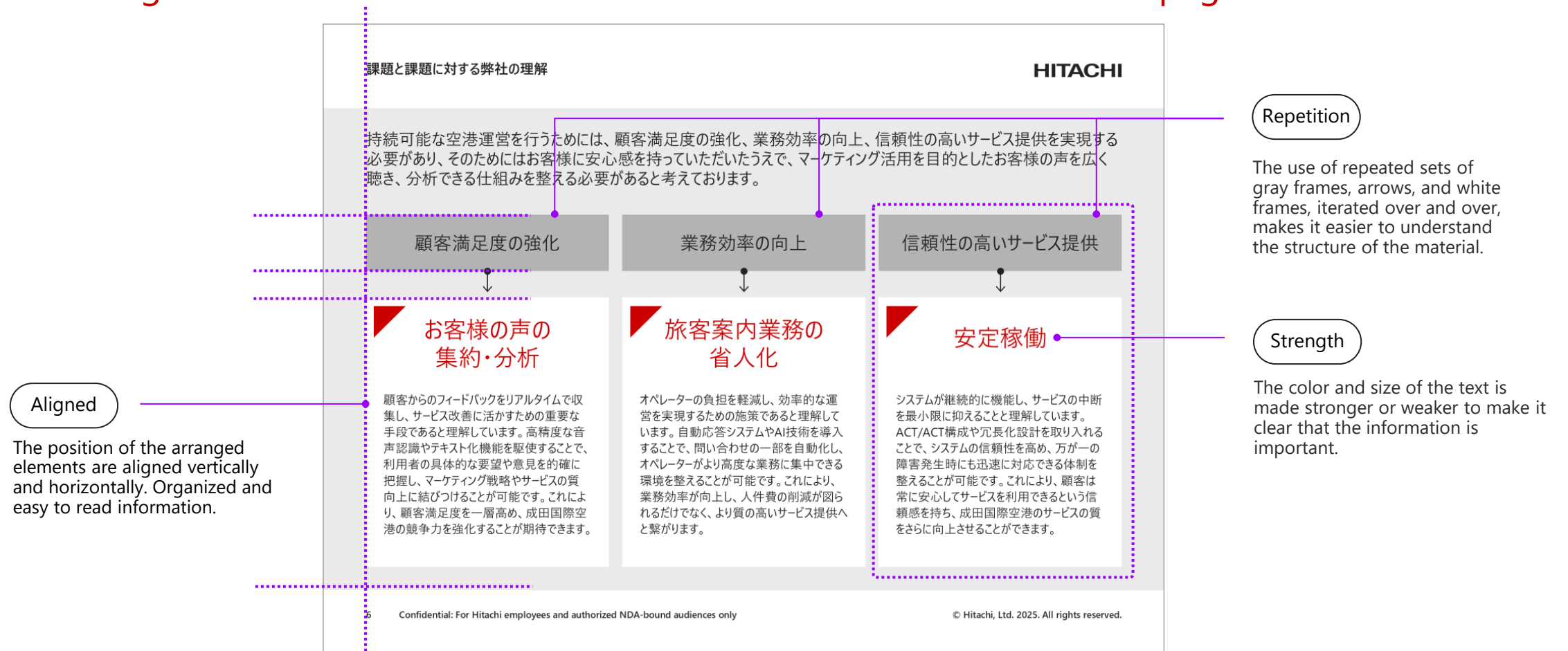


Aligned

Aligning and arranging the margins between boxes gives an organized impression. It also makes it easier to intuitively understand that the relationship between boxes is the same.

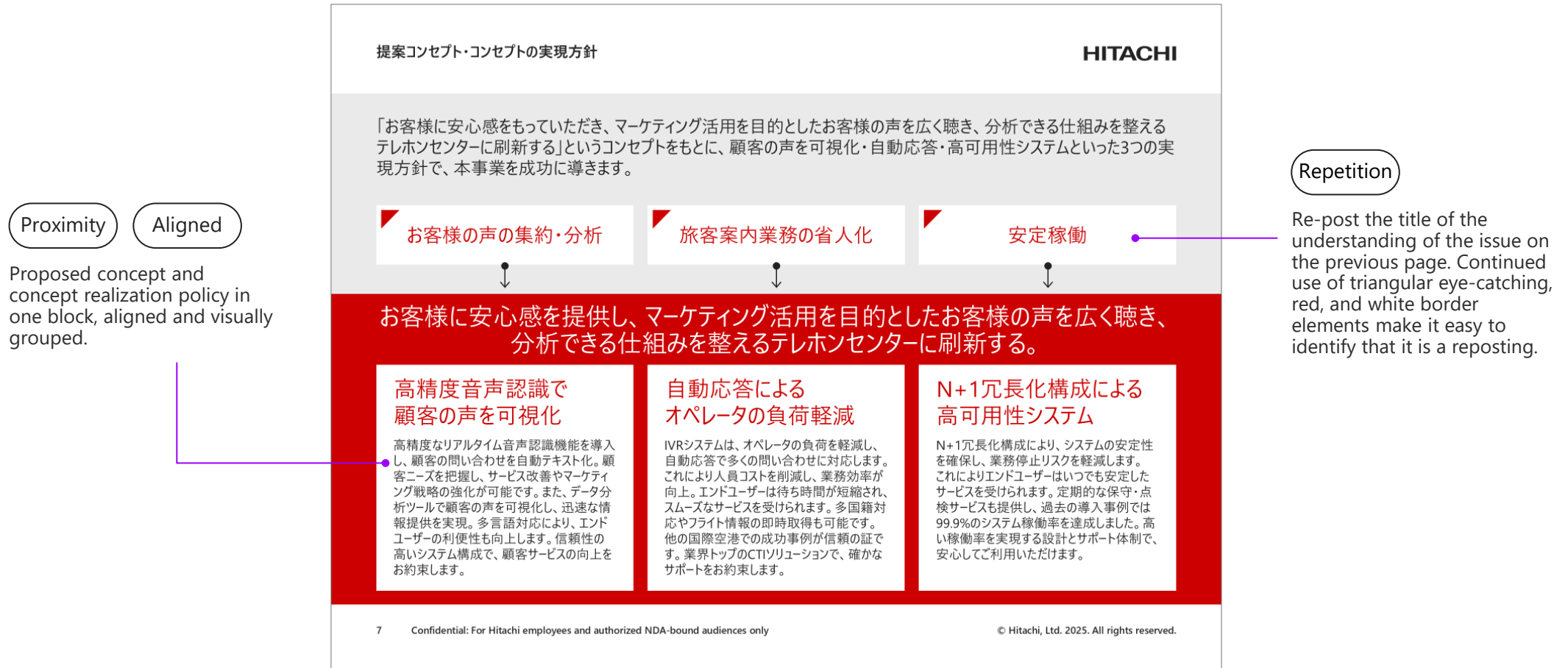
(2) Create materials that convey through visual design

Understanding the issue and our company : [Strong, Weak, Repetitive] Change the color only for understanding the issue and continue the same color scheme rule on other pages.



(2) Create materials that convey through visual design

Proposed concept and Conceptual Implementation Policy : [Proximity and Alignment] Proposed concept and Conceptual Implementation Policy in one block, aligned and visually grouped



Solutions to problems with proposal activities

We have explained the key points of visual design that should be followed.

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Form a hypothesis

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Helpful tools

Helpful tools

Hitachi's brand guidelines have been renewed.
In line with this, all of CPC's tools have been revamped.

The tools provided by CPC have also been revamped in line with the new brand guidelines and will be available on the CPC portal at the end of June 2025.
All of these tools have been confirmed and published in the (GBC).

[Link to download page](#)

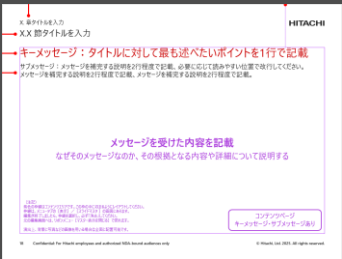
Helpful tools

Templates and efficiency tools help customers create easy-to-read and easy-to-understand materials.

[Link to download page](#)

Proposal Template

Define and unify rules for appearance, such as font size, alignment, etc.



Efficiency Tools

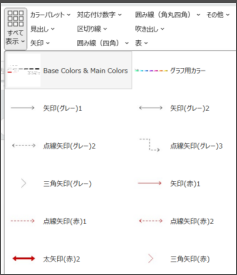
Color Fill Tool

Prevent color inconsistencies with PowerPoint's add-in tool that allows you to quickly assign colors to a brand-new color palette and efficiently create figures and tables.



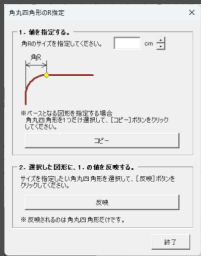
Part Insertion Tool

An add-in tool that makes it easy to use recommended parts such as arrows and enclosing lines at any time. You can insert recommended parts into slides with simple operations.



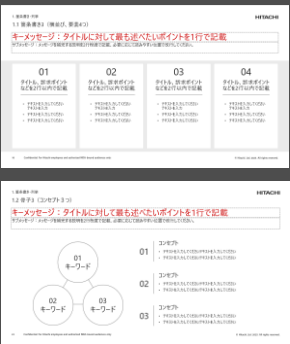
Shape editing support tool

A tool that supports the creation of documents of a higher grade for those who want to achieve a high level of design with a sense of unity in every detail.



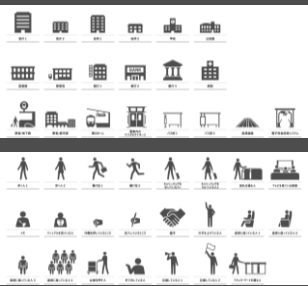
Design Patterns

A model of diagrams (over 90 types) commonly used in proposals, including bullet points, system configuration diagrams, flow diagrams, etc.

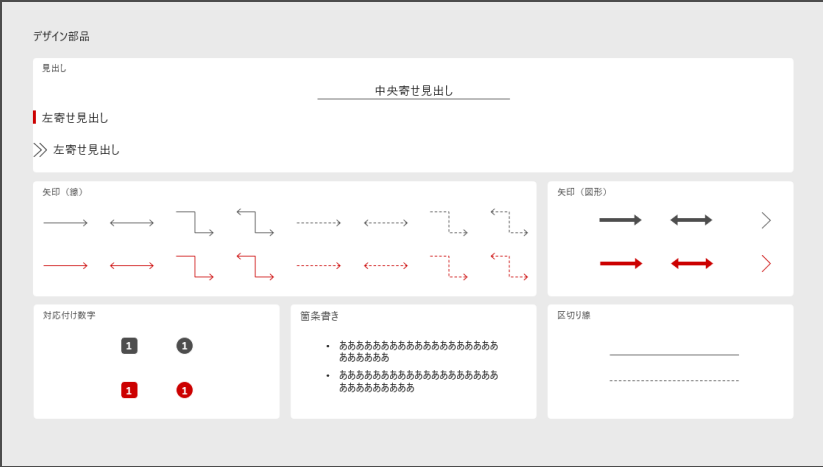
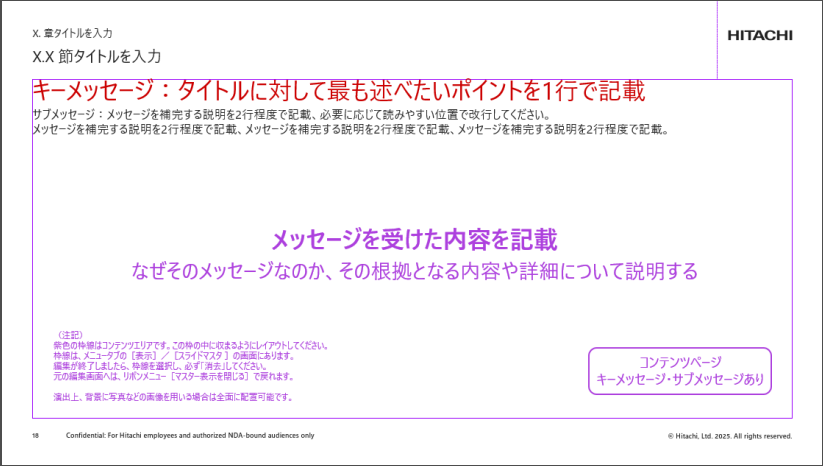


Simple Illustration Materials

A collection of illustrations (over 600 types) that can be used in proposals for a variety of industries. Diagrams with a uniform taste can be created efficiently.



Helpful tools



Proposal Template

The rules of style, such as the placement of titles and text, are defined. It is set up to reflect the design concepts of the new brand guidelines, allowing for the immediate creation of new brand materials.

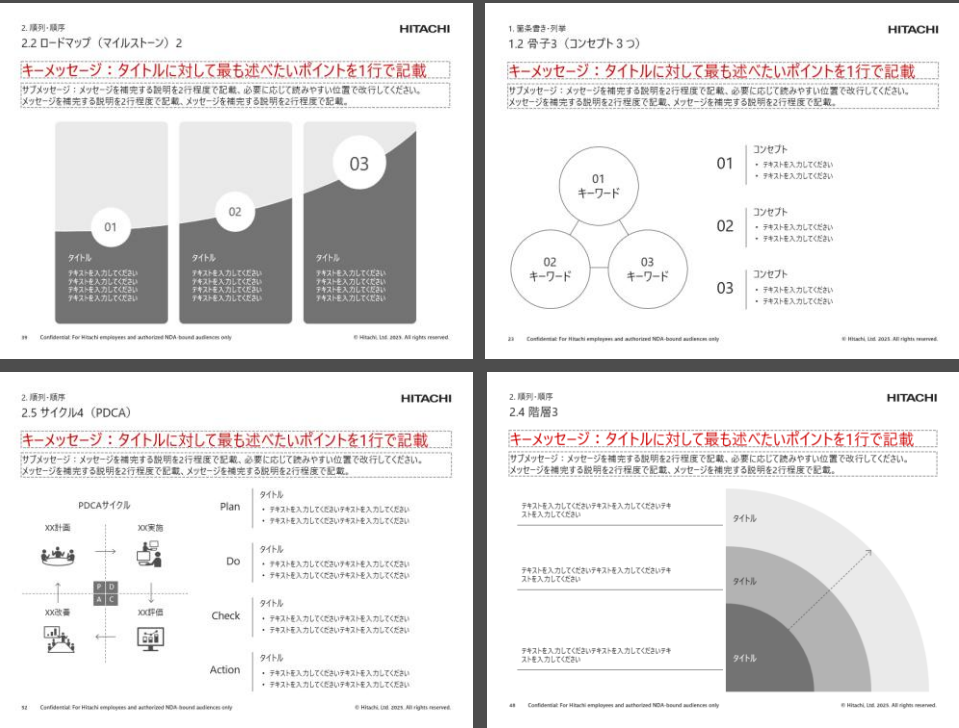
- PowerPoint format A4 landscape (4:3, 16:9), A4 portrait
- Word format A4 portrait
- A3 summary

Click here to download the CPC provision tool ↓
< [Proposal Development Tools \(hitachi.co.jp\)](https://hitachi.co.jp) >

Helpful tools

Proposal Design Patterns

More than 70 types of expression designs that clarify the logical structure are available as components. By simply copying and pasting the components, you can create an easy-to-understand, sophisticated proposal.



Click here to download the CPC provision tool ↓
[Hitachi.co.jp](https://hitachi.co.jp)

Helpful tools



Simple Illustration Materials

Simple pictogram-style illustrations.

Diagrams with a unified taste can be created efficiently.

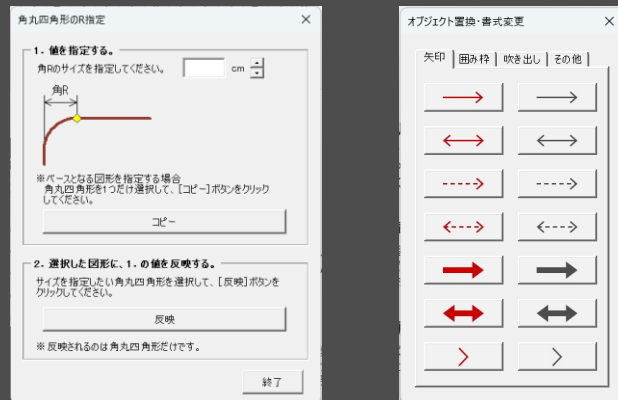
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Helpful tools

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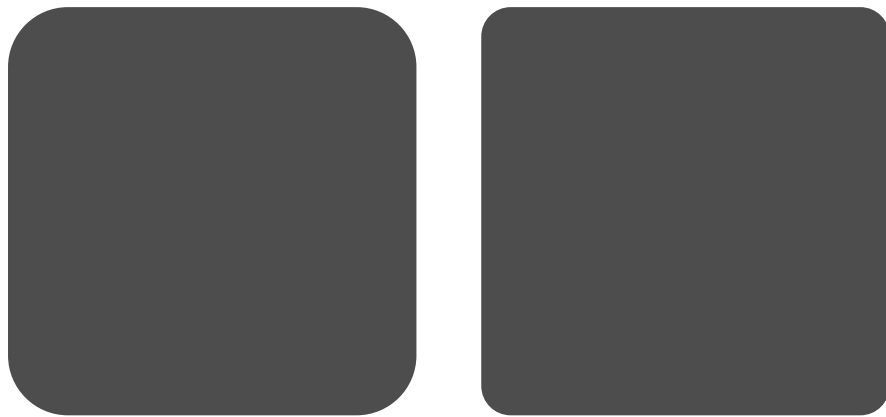
A tool that supports the creation of documents of a higher grade for those who want to achieve a high level of design with a sense of unity in every detail.

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Sample page for demonstration: Introduction of some functions of the Shape editing support tool

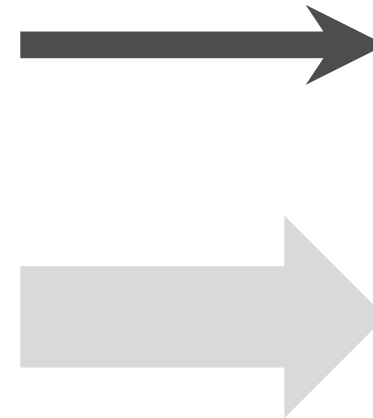
Specify the corner R of a rounded rectangle

The standard PowerPoint functionality does not allow to set the same rounded corners. By aligning all the shapes, you can create a more sophisticated impression document.



Replace a shape

Often the task of changing a figure to a new brand-new color or shape is required, for example, by diverting existing materials. Any figure can be replaced with a "frequently used design component".



Helpful tools

Templates and efficiency tools are available on the CPC portal site.

[Link to CPC Portal Site](#)

The screenshot displays the Hitachi Connect CPC portal site, which is a resource hub for various tools and templates. The site is organized into several main sections:

- 新ブランド(2025)ツール (New Brand 2025 Tools):** This section includes a "ツール標準セット" (Tool Standard Set) for creating proposals and a "プロポーザルマネジメント" (Proposal Management) section with tools like "ディスカッションシート" (Discussion Sheet), "コンテンツプランシート" (Content Plan Sheet), and "コンテンツプランシート" (Content Plan Sheet).
- 事前準備 (Preparation):** This section includes tools for "ソリューション提案書用情報整理シート" (Solution Proposal Information整理 Sheet), "ソリューション提案書用ストーリーフレームワーク" (Solution Proposal Story Framework), "ソリューション提案書用目次設計シート" (Solution Proposal Table of Contents Design Sheet), "スケジュール表" (Schedule Table), and "表記ゆれ防止用語統一シート" (Terminology Unification Sheet to Prevent Discrepancies).
- テンプレート (Templates):** This section includes a "サマリーテンプレート (A3サイズ)" (Summary Template (A3 Size)) and a "公共調達向け提案書テンプレート (Word)" (Public Procurement Proposal Template (Word)).
- デザイン部品 (Design Parts):** This section includes a "提案書デザインパターン集" (Proposal Design Pattern Collection) and a "写真素材集" (Photo Material Collection).
- 効率化ツール (Efficiency Tools):** This section includes a "PPTスライド比較ツール (PowerPointアドイン) ※β版" (PPT Slide Comparison Tool (PowerPoint Add-in) ※ Beta Version), a "PPTフォント統一ツール ※β版" (PPT Font Unification Tool ※ Beta Version), a "提案書構成ツール ※β版" (Proposal Structure Tool ※ Beta Version), and a "シンプルイラスト挿入ツール (PowerPointアドイン) ※β版" (Simple Illustration Insertion Tool (PowerPoint Add-in) ※ Beta Version).
- ノウハウ集 (Know-how Collection):** This section includes a "プレゼンツール" (Presentation Tool) and a "デザイン教本" (Design Textbook).
- お問い合わせ (Contact Us):** A section for user inquiries.

The site also features a "Hitachi Connect" header with a "CPCについて" (About CPC) link and a "お問い合わせ" (Contact Us) link. The footer includes a copyright notice: "© Hitachi, Ltd. 2025. All rights reserved."

Solutions to problems with proposal activities

We explained two key proposal design points to follow and useful tools to use when confirming with key stakeholders that the proposal will provide value to the customer.

Gather information

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HITACHI