



International Caterers Association

International Caterers Association - 3601 East Joppa Road
Baltimore, Maryland 21234 - (410) 931-8100



Peer to Peer Learning – ICA Roundtable

Software Programs for Creating Proposals

Cory Gosik – June 19, 2015

Q: What program does everyone use to create proposals? And do you use different programs for different kind of proposals? Right now we use Caterease, just exploring other options...

A: Timothy Richard- I use Pages on my Mac. It is so easy to insert photos, move pages around, create charts, etc. Our Caterease is also set up to automatically print out proposals which is really helpful when you have a lot to push out!

Julia Kendrick Conway- Word

Jennifer Perna- We use CaterXpert for 95%. For full blown theme proposals we are fortunate to work with our marketing team on custom graphic designed proposals

Donald W. Blyler III- We use CE, but a word document for the actual proposal. We are moving toward all CE proposals.

Kevin Lacassin- We do ours in MS Word. Our software of choice is TPP but the proposals are not flexible enough for our needs. Once an event is sold, it gets entered into TPP.

Rochelle Myers I have a Filemaker Pro database I use to write them.

Amber Rayniak- We are the same as Donald W. Blyler III, transitioning over to all caterease generated over the next couple of weeks

Margot Jones- We use TPP and have been for about 5 years. We use it to write proposals, packing lists, prep sheets, etc.

Monica Holmes- TPP

Sabdy Pacheco-Williams- We currently use Word, but are moving to Caterease for everything.

Julia Kendrick Conway- Since 90% of our business is conducted via email, we use Word for the menu (with logos, of course) and contracts, but also do quite a bit of writing in the native email app and add photos and videos, as well as links to our website and social media for the client. We also now provide links to our review sites as well. My wedding clients are less and less interested in formal written proposals.

Erin Loney- For those of you using CE for full proposals can we talk??!! What does this look like? We use CE then format in Word.

Sue Carlisle- We have done our proposal and contracts using Word for the last 6 years. About 4 months go we started using Total Party Planner. Very user friendly and it has saved us a ton of time not having to re-create the wheel each time. Very cool!

Kelly Early- FYI all when Caterease releases their next version they have built it on a SQL platform and will have a lot of different options. As for proposals we have used marketing tools to create every print we use. They are pretty with pictures.

Fausto Pifferrer- For us it the Same as Kevin

Lauren Leonard- We use CE, but a word document for the actual proposal to add in pictures & format our menu items.

Matthew Baker- I use TPP and loving it

Carl Clemetson- TPP

Chrissy Norvell- Erin Loney we use caterease and our pictures where imported once you enter your menu into the proposal. Are your pictures loaded?

Erin Loney- Chrissy Norvell no! This is news to me. I am way behind I think.

Sarah Mustapha- Erin Loney I think our lives have just been changed!

Chrissy Norvell- yes!!! OMG... we didn't purchase it until we knew this could happen!!! LOL

Chrissy Norvell - And they will set it up for you that it always looks like it does in Word... once we purchased CE I NEVER opened word again... Never... when you hit "Print" we had them set up our "Word" looking document and everything was transferred and looked perfect like it came from "word" and not so "corporate" looking... I promise.... Crap.. you paid a lot of money, they will get it straight for you... they did for us.

Julia Kendrick Conway- No disrespect intended, but "corporate looking" is the antithesis of our perspective on destination weddings. We strive to make every proposal individual and personal. Since we have zero corporate clients in our area (save a few executive retreats), this is not a deal maker for us.

Carl Clemetson- I use TPP because it streamlines and makes everything more structured. Around here, if you get a catering proposal that's not hand written on scratch paper or a napkin, you're already ahead.

We have brides comment on how professional our proposals looked compared to others so we are ahead

Vijay Goel- We start with Powerpoint. Makes it easy to swap in and out various pictures on themed pages. We're fairly picture driven (and love InDesign for our menus) but powerpoint is easier/ more modular to work with than Word

Emma Casey- we started on Quickbooks about 15 years ago. About 5 years ago we moved to Caterease. It has been great. Our clients are mostly corporate.

Cynthia Creighton-Jones- I use TPP, and love it. It has made my life so much easier. From the initial POS, right through to the final invoice.

Chrystal Puckett Woodson- We have been using TPP for about 10+ years and we love it. From start to finish. TPP continues to update and make changes for ease of producing our events.

Kim Lauria- I have not seen many upgrades this year. thinking about changing. to caterease.

Ken Barrett- We paid Caterease to create a custom print that looks and functions like what we were creating in Word/Pages. It is uber contemporary - our style - and filled with imagery. We have been using it for a short time and it seems to work well. We still go outside the Caterease program to create large scale event plans for parties with compile staging, design and intricate details.

Rosinne Chlala- We are using TPP to stream line the basic process and then fine tuning with custom letters and custom pricing in Word... this has been a great conversation.. THANKS!!!

Cynthia Creighton-Jones- I tried Caterease and just did not work for me. TPP is great.

Cynthia Creighton-Jones- Does everyone include photos in their proposals?

Ken Barrett- we do put pictures on all proposals. some are more customized than others

Kelly Early- Ken you can do pictures in proposals in Caterease. I like you, I may be inclined to show you my secrete wink emoticon

Ken Barrett- Glad too...give me a call tomorrow, out in the field today.

Cynthia Creighton-Jones- Hmm what about TPP, as an one do photos there too?

Carl Clemetson- Yep

Ryan Crafts- We are currently using Caterease. However we are exploring using pandadoc instead.

Jill Christy- it would be fun to post each of our favorite proposals to view different formats - I will post one, but don;t know best format to post.....

Amanda Hosking- Ken Barrett, would you mind sending me a copy of your custom print that Caterease created for you? Would be interested in seeing a dressed up print. We currently do not include any photos, just our logo.

Thanks! Info@partymancatering.com

Jerry Edwards- We have used several off the shelf programs over the years. We decided 5 years ago to develop our own program and it is wonderful. We have taken pieces of different programs and joined them together. It was also very expensive.