PROPOSAL CONTENT MANAGEMENT EVOLUTION

AI Acceleration Era
2023-

Biggest shift since advent of the Internet!

Generative AI

Response Management Era
2012-2023

Information stored in Q&A pairs

Architecture, tagging, keywords became crucial for AI/auto respond
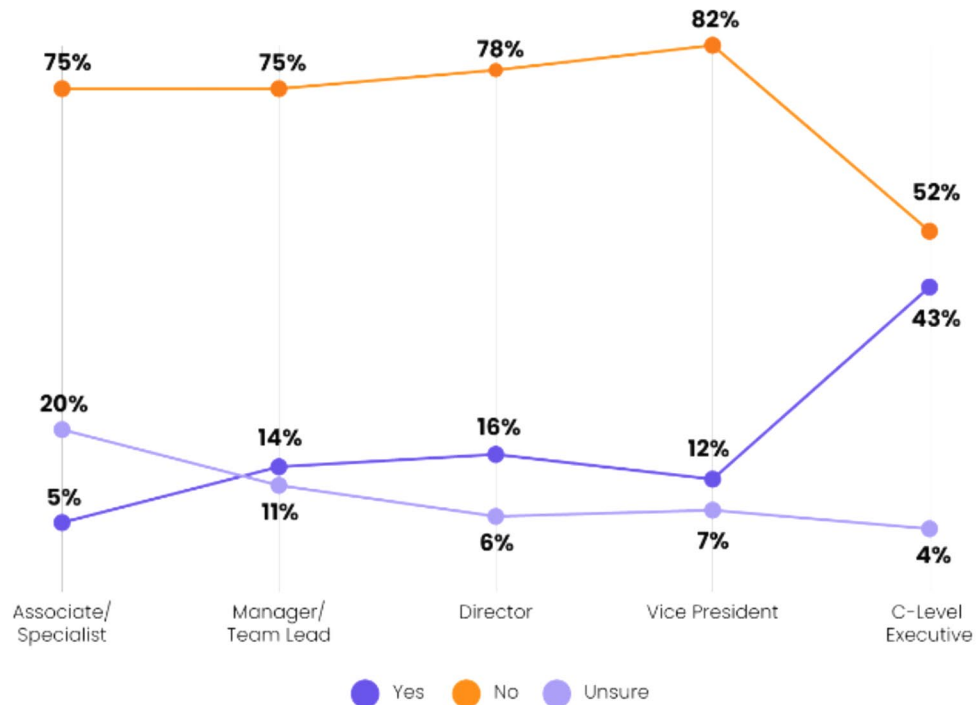
Automation feature race

Content Management Platform Era
2005-2012

Sant software

Started to explore use of Q&A pairs

Build proposal

Microsoft Online Era
2000-2010

SharePoint: Content stored in documents

Excel: Quick facts

No automation

SURVEY QUESTION:
DO MORE WITH LESS

Majority Say AI Won't Replace RFP Teams (Except C-Suite)

No line: 75% (Associate/Specialist), 75% (Manager/Team Lead), 78% (Director), 82% (Vice President), 52% (C-Level Executive)

Yes line: 5% (Associate/Specialist), 14% (Manager/Team Lead), 16% (Director), 12% (Vice President), 43% (C-Level Executive)

Unsure line: 20% (Associate/Specialist), 11% (Manager/Team Lead), 6% (Director), 7% (Vice President), 4% (C-Level Executive)

- Yes
- No
- Unsure

43%
C-suite who say they've considered replacing people resources with AI

Loopio

GENERATIVE AI?

GENAI: REPLACEMENT OR TOOL?

GenAI is a tool

- Options are still the "Wild West"

- Mixed viability to search real-time data

- Project management missing

- Variety of adoption

Best current solution?

- Response management platforms + GenAI
- Set parameters
- Validation is essential

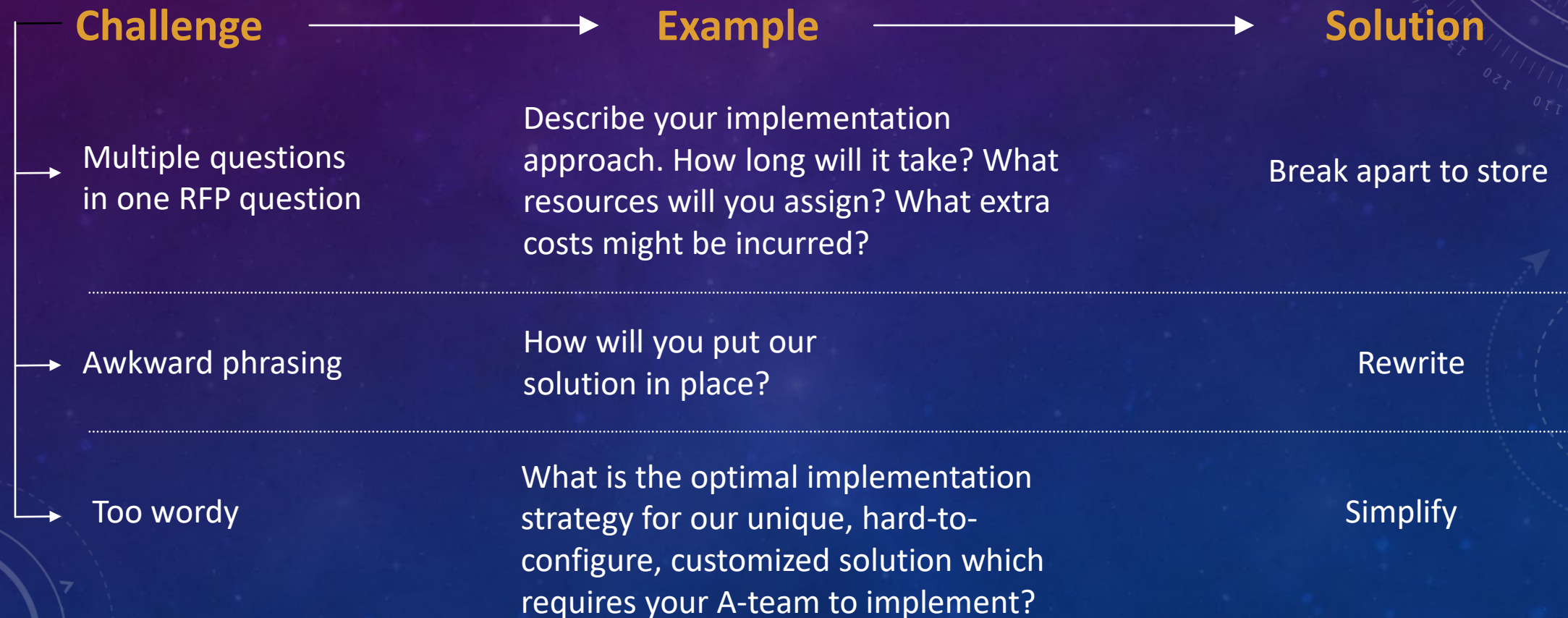# RESPONSE MANAGEMENT PLATFORMS

- Optimizing Auto Respond's performance
    - Matrixed content architecture
    - Simple questions
    - Clean and concise answers
- Search Tools
- GenAI Capabilities

MATRIXED CONTENT ARCHITECTURE

	Business Unit 1	Business Unit 2	Business Unit 3	Business Unit 4
Corporate				
• Company Overview and History	●	●	●	●
• HR	●	●	●	●
• Legal	●	●	●	●
• Insurance	●	●	●	●
Security				
• Physical security	●	●	●	●
• Virtual security	●	●	●	●
• Certifications	●	●	●	●

SIMPLE QUESTIONS

How the client wrote it isn't always how you should store it

Challenge	Example	Solution
Multiple questions in one RFP question	Describe your implementation approach. How long will it take? What resources will you assign? What extra costs might be incurred?	Break apart to store
Awkward phrasing	How will you put our solution in place?	Rewrite
Too wordy	What is the optimal implementation strategy for our unique, hard-to-configure, customized solution which requires your A-team to implement?	Simplify

QUALITY ANSWERS

Clear

Concise

Correct

WORDS:
FRIENDS OR ENEMIES?

Words as your friends:

- **Common words**

- **Industry terms**

- **Reusable (not client-specific)**

- **Benefit specific**

Words as your enemies:

- **Jargon**

- **Unusual/strange phrasing**

- **Gobbledygook**

AUTO RESPOND EXPECTATIONS

70-90%

Corporate

50-70%

Security

40-50%

Technical/product

SEARCH TOOLS TO FIND TOUGH CONTENT

- Keyword (overtype)
- Boolean search operators (AND, OR, NOT)
- Phrase "SOC 2 Report"
- Proximity "security certification"~5
- Fuzzy (~ at end of a single-word term)
- Wild Card (* at start or end of word; ? anywhere in the word)
- Stemming

HOW CAN GENAI HELP?

- Combine answers

- Change tone

- Change length

- Translate to different languages

- Develop alternate answers

- Create *first draft* Executive Summaries or section contents

GENERATIVE AI PROMPTS

Initial Prompt Formula

My role and activity
+ My need froom AI
+ My objective
+ What AI should consider
+ What response I expect and how

Prompt Follow-Up Formula

Affirmation + Clarification
of need or continuation +
More context + More
instruction

ACTIVE CONTENT MANAGEMENT IS CRUCIAL

1 Benefits of dedicated content manager

- Focus

- Consistency

- Platform optimization

- Quality/brand standards

- Current/accurate (SME partnerships)

- Content library expert

CONTENT MANAGEMENT
BEST PRACTICES

2

- **Use moderation**
Clean it up and make resusable before it goes into the library

- **Set review cycles and stick to them**
  - Corporate: Annually
  - Security: Annually
  - Technical/Product: Quarterly or product release cycle

- **Dedupe**
  - Searching
  - Dedupe tools

- **Make it easy to add new content**
  - Monitor proposal manager contributions
  - Err on the side of too many Q&A pairs rather than too little

- **Monitor content usage**
  - Monitor content usage (crowdsourcing approval)
  - Purge annually based on usage

- World between **marketing, product, and proposals converging**

  - **Response platform space to consolidate** (crowded market; lots of new GenAI entrants)

- **Our jobs are moving from tactical to more strategic**

  - Continue **shift and innovation** (stay informed, be curious and flexible)

- **Eliminate content housing duplication** (Internet/Intranet/Response Management Platform)

- **Keep calm and carry on** –this isn't the end of the proposal world

QUESTIONS?