The **top 5** benefits of using a **Proposal Automation System**

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Consider what the right **proposal automation** system might do for your business by considering the benefits it can provide

This guide explains the **top 5 benefits** of using a Proposal Automation System.

The top 5 benefits of using a Proposal Automation System

By Ray Meiring, CEO, Qorus Software

> *Proposal Automation Systems are by no means the silver bullet to the challenges experienced by Bid Managers, however, they do provide tangible benefits when creating and developing complex proposals.*

The creation of proposals is an expensive and time-consuming exercise for most organizations. Re-usable content like product and service documentation, biographies and answers to frequently asked questions is often stored in a variety of locations or locked into past proposals saved on individual's computers. This makes collaboration and knowledge sharing an impossible task.

The overhead this places on the organization is significant. Creating a compelling proposal involves the laborious tasks of locating content, re-purposing it for the client and then assembling it into a single document. Over and above this there is still the need to ensure that the formatting and branding is consistent and that no out-dated content has mistakenly been incorporated. This process is time-intensive, error-prone and highlights inefficiencies.

Proposal Automation Systems are by no means the silver bullet to all of these problems. They do, however, provide tangible benefits. The points below highlight just 5 of the benefits that your organization could experience from the implementation of an effective Proposal Automation System.

Benefit #1: Reduce time and frustration by easily locating common content   tweet

At the heart of an effective Proposal Automation System is a central repository of commonly used content - a single source of your company's proposal knowledge. Content stored in this Knowledge Source may include FAQ's, resumes and biographies, product and service documentation, company and legal information.

Powerful search capabilities make it easy for proposal writers to locate and insert common content into their proposals. Searching for content should be a "Google" like experience whereby the user can find content by supplying text phrases. In addition, tagging and categorizing content is a fundamental requirement to ensure that no time is wasted locating and identifying content.

Your important content is written once and then stored, tagged and available for others in your company to easily locate and re-use. By centralizing content into a Knowledge Source the time and frustration experienced by your proposal writers when searching for the correct content will be greatly reduced.

Benefit #2: Improved content management results in accurate and up-to-date proposals

tweet

Companies must respond faster with fewer resources while running out of "quick wins"

Your company's Knowledge Source should not serve as just another repository for *any* perceived re-usable content. The content should be relevant, accurate and well managed. This often requires the attention and ownership of designated content managers in the firm.

Content that is added or suggested to this Knowledge Source should be subjected to an approval process to ensure that it is accurate and correctly branded. Applicable content should be reviewed and versioned to keep it up-to-date.

By managing common content stored in a central repository, your company can have the peace of mind that the content that you are using in your proposals is accurate and correct. This significantly reduces the amount of re-work often required in creating proposals and lowers the risk of you issuing a proposal with out-of-date information.

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Benefit #3: Guided proposal creation assists the rapid creation of consistent proposals

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In the absence of a proposal automation system, proposal writers need to locate the required content and then cut and paste it from the source document into the proposal they are creating. Again this process is time consuming and error-prone.

An effective proposal automation system will allow your proposal writers to rapidly assemble proposals using the managed content stored in your Knowledge Source. Proposals often follow a common pattern and it should be possible for proposal writers to use a template that automatically guides the writer through the creation of the proposal. As an example, when working on the cost and pricing section of a proposal the writer may be guided through a search in your Knowledge Source to locate pricing specific to a product or geographic location.

The use of templates, content checklists and guided searches will greatly reduce the time taken in the assembly of your proposals and ensure that your proposals are consistently created with the correct brand, layout and format.

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Benefit #4: Smart content brings tailored, focussed proposals to the table

tweet

Creating a truly compelling proposal requires your proposal to be tailored to your client's exact needs. For each proposal created, writers have to go through the time consuming task of personalizing the proposal.

Smart content uses your client data to automatically tailor the proposal to the client's needs and requirements. As an example your terms and conditions can be automatically adjusted to remove irrelevant information for that client and focus on the information that is important to the client receiving the proposal.

By using smart content that adjusts according to client data, your company will ensure that your proposal will focus on content that is relevant to the client while hiding unnecessary information. The final proposal that is created is focused, uncluttered and more compelling to your client.
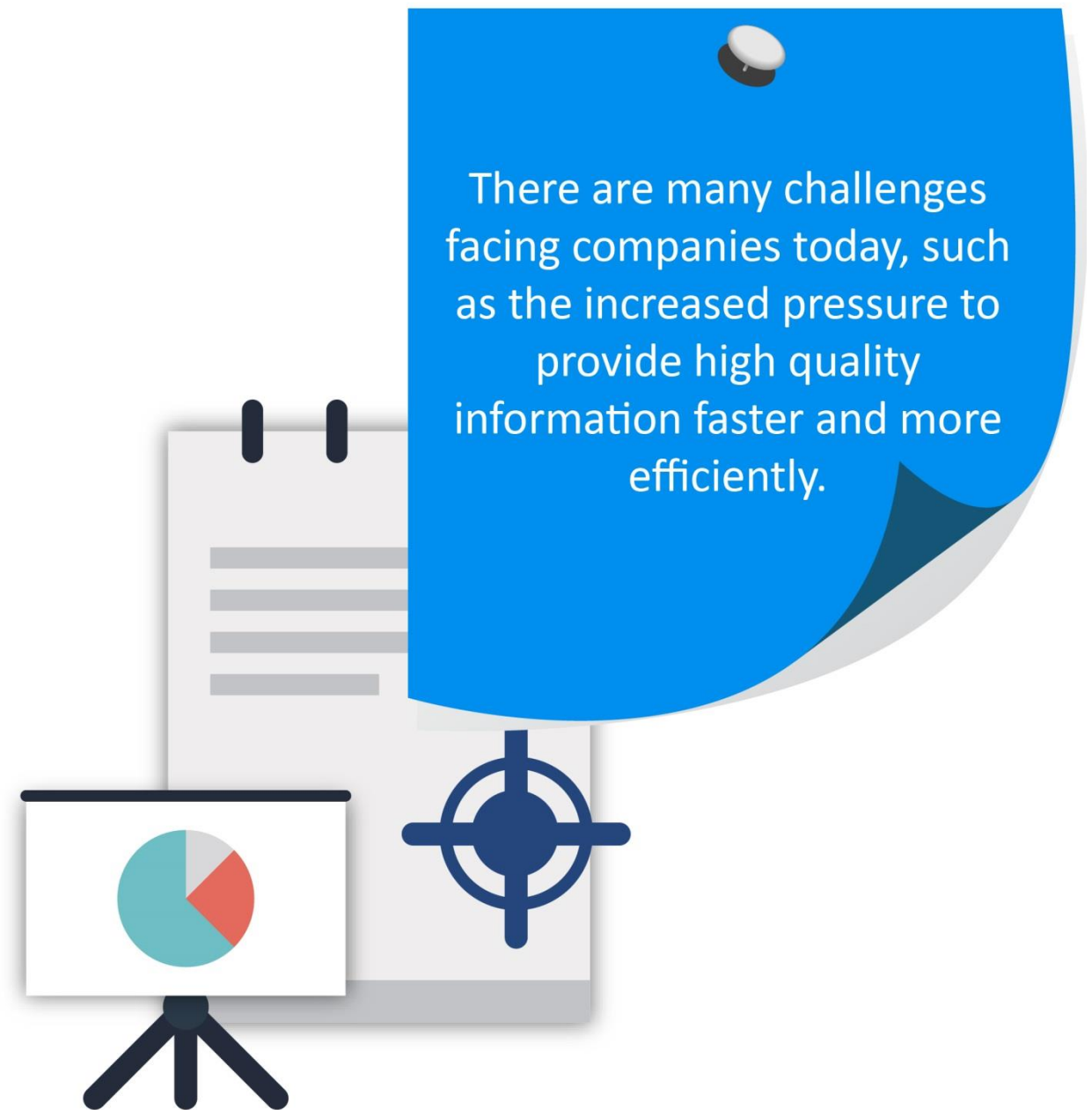
Benefit #5: Drive continuous improvement through accurate reporting ▸ tweet

Proposal teams are compelled to reduce costs, improve accuracy and remove frustrating time spent creating proposals. The ultimate goal however is to win more business by developing better proposals. To track progress, these goals and objectives need to be measurable.

Reporting will help your company to gauge the successful operation of your proposal creation process. It will assist you to evaluate your proposal success and help you to make adjustments where necessary. You will be able to understand where bottlenecks are occurring in the proposal creation process. Having a view into how and when content is being used will assist content managers to monitor trends and improve standards and success rates.

There are many challenges facing companies today, such as the increased pressure to provide high quality information faster and more efficiently.

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In conclusion...

After implementing an intuitive proposal automation system organizations have experienced 30-40% improvement in the time taken to create first draft proposals.

While implementing a Proposal Automation System it certainly is not going to solve every proposal creation challenge but it will improve productivity and efficiency, safeguard critical corporate knowledge and ultimately improve client retention and the attraction of new clients.

For more information on the benefits of automating the proposal creation process, visit the Qorus Software web site at www.qorusdocs.com or contact us on info@qorusdocs.com
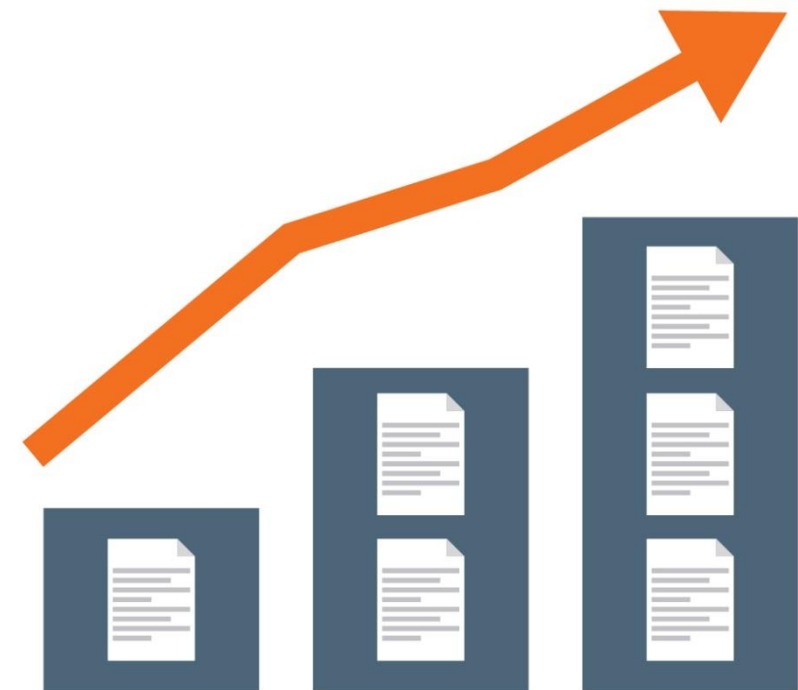
TIPS AND TRICKS for Proposal and Presentation Styling

Have you ever sat in on a presentation and found your attention dwindling because you can't read what's on the monitor, the tables and graphs aren't clearly explained or there is simply too much information hiding the overall message?

If you have, or you've been the one receiving the blank stares throughout your presentation, then perhaps something needs to change. If you are putting together a proposal for potential clients your styling is as important as your content and presentation skills. It's important to focus on all aspects of your pitch in order to make a meaningful impact.

Always ensure that any information being produced is: powerful, adaptable, accessible, understandable, clear and concise. What does this mean?

Very basically, your diction and graphics should have a unified overall look-and-feel that supports your core message.

So how do you go about this?

Written Language Tips for Proposals

Take care over the vocabulary you use:

- Keep your vocabulary simple to aid the buyer's understanding
- Use the buyer's words and phrases, where possible
- Be consistent with the terminology you use
- Check your document for any spelling mistakes
- Avoid flowery, pretentious writing - rather use short sentences
- Don't use double negatives. For example: *The results are not inconclusive*
- Use the active voice by identifying the action and who is performing it
- Focus on the positive
- Make the reader care
- Write 'you' not 'one must' or 'the user' or 'the reader'
- Use a font that is simple, plain and easy to read such as Times New Roman, Arial, or Helvetica
- Select a font size that is large enough to be seen at the back of the room
- Use both upper-and lower-case letters; all upper-case letters are difficult to read

> How to achieve more accurate and professional documentation

Your language and wording should not be the only thing you focus on when it comes to styling and content. Graphics such as tables, graphs and other images form part of your content as well, therefore you should have unified style-guide rules here as well.

Visual Language Tips for Presentations

Create a unified visual language:

- First and foremost, take advantage of a style sheet to help guide you
- Make sure that your pre-set themes and settings complement your needs and fit your overall message. For example: using Microsoft Office fonts like Cambria or Calibri
- Ensure that you present a unified visual language. Have a clear presentation format when it comes to colour, text and image formatting or any other styling
- Keep the design simple, too many words, graphics or colours can be distracting
- Assign a title for each visual – this will help your audience retain the information
- Limit the number of ideas on each visual, for example the number of bullet points on a page should not exceed 4 to 6 points
- Each bullet point should be short, approximately one line
- Use colour for emphasis and organization but use it judiciously and consider which colours are easier or harder to continually focus on. Reds and oranges stand out but are hard to continuously look at as opposed to greens, blues or browns

- If you are using tables or diagrams make sure that they are simple and clear and that your audience is able to read all the data
- Use a horizontal (landscape) layout, not a vertical (portrait) one. Most screens and computer monitors are shaped for a horizontal format
- Any bold shapes should be reserved for headings and action elements
- Little or no "decoration" such as patterns, textures, gradients or shadows should be used except to place specific emphasis
- Borders and background tone should be used to group devices or emphasize important elements
- Be generous and consistent with your use of white space, it draws focus to your content
- Ensure that your proposal is aesthetically pleasing through the use of minimal graphic style and comes across as confident without overstating any content
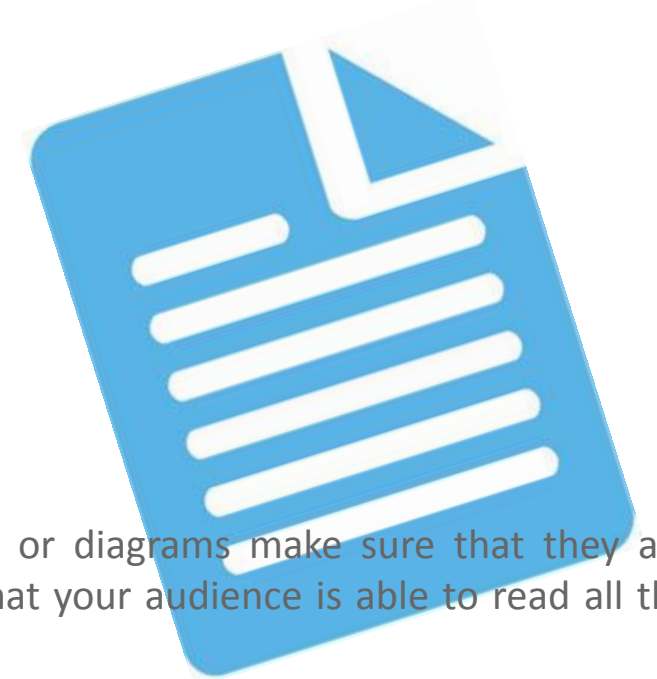
5 Influential LinkedIn groups worth following:

- Bid and Proposal Management Professional
- Business Development
- Writing Marketing and Sales from CapturePlanning.com
- APMP
- AIIM

Download
'How Technology is changing Bidding'
by Alex King

Learn More About Qorus Software

Qorus Software is a global provider of document and proposal automation solutions for Microsoft™ Office® and SharePoint®. The company helps organizations significantly reduce costs, as well as the time and effort required to generate customized documents, while improving the quality and accuracy of content.

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