

# The Essential Guide to **AI** Implementation In Proposals



# Introduction

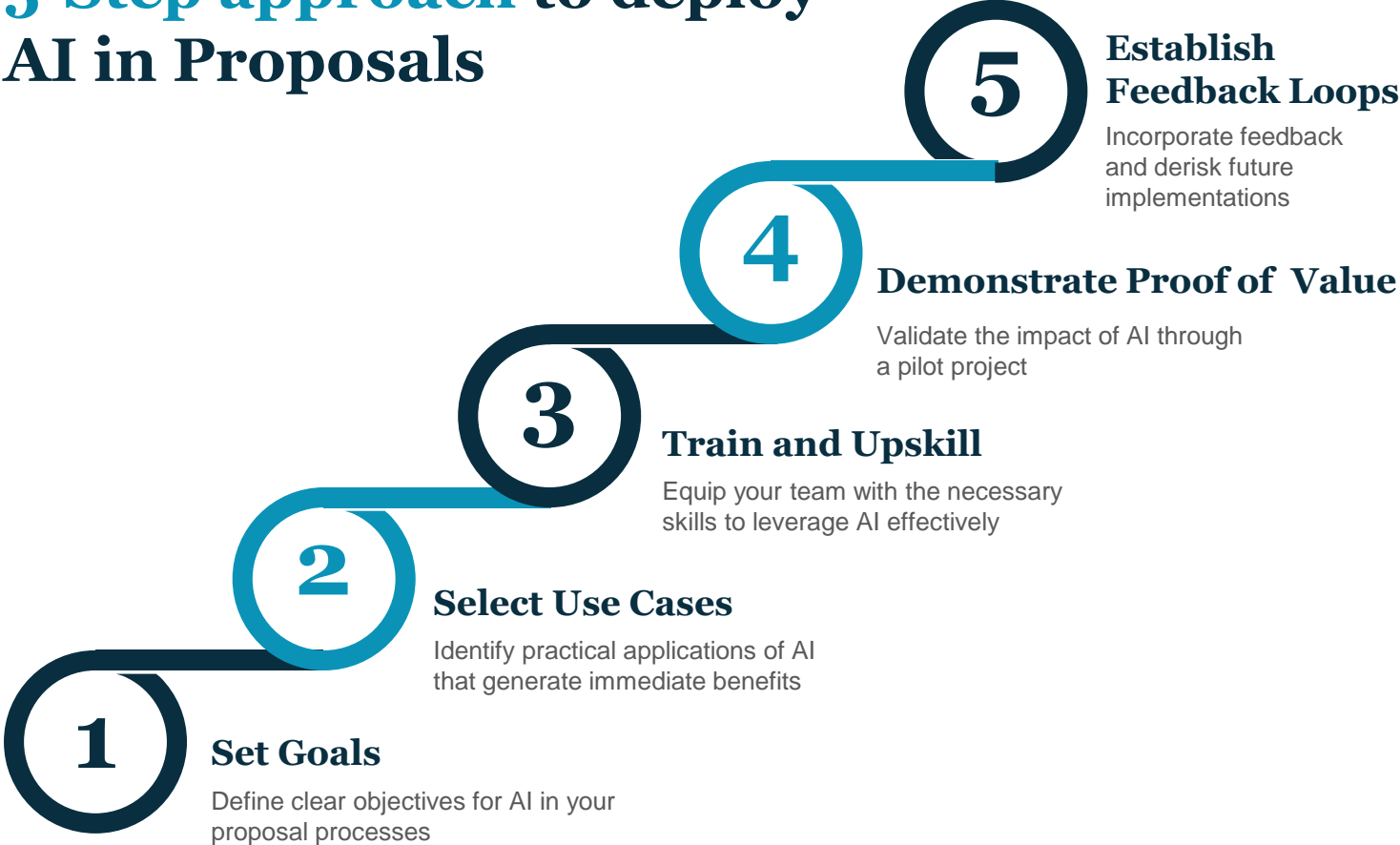
## Think Big. Start Small. Act Fast

Artificial Intelligence (AI) requires a thoughtful approach to testing and implementation due to its unique characteristics and inherent risks.

Developed from practical experiences with previous client implementations, this guide leverages real-world insights to ensure effective integration of AI into your workflows.

This guide will walk you through a 5-step approach to deploy AI in Proposals for organizations of all sizes. It will also set a foundation for future strategic implementations both culturally and technologically.

## 5-Step approach to deploy AI in Proposals



# 1. Set Goals

Start by defining what you want to achieve with AI in your proposal processes. Setting a clear goal is the foundation for selecting the right AI applications and measuring success.

## Explore AI Opportunities

Use the AI Opportunity Map for Bid Response, a proprietary framework developed to guide your AI integration strategy. This map outlines four key areas where AI can enhance your bid response capabilities.

1. Proposal Development
2. Proposal Strategy
3. Capture Strategy
4. Insights Generation

### Recommendation


Start with the Proposal Development quadrant and choose use cases that are easy to automate. Eliminating manual and repetitive tasks is a tangible proof point to justify further investments. This will set the stage for more complex AI implementations.


## AI OPPORTUNITY MAP FOR BID RESPONSE



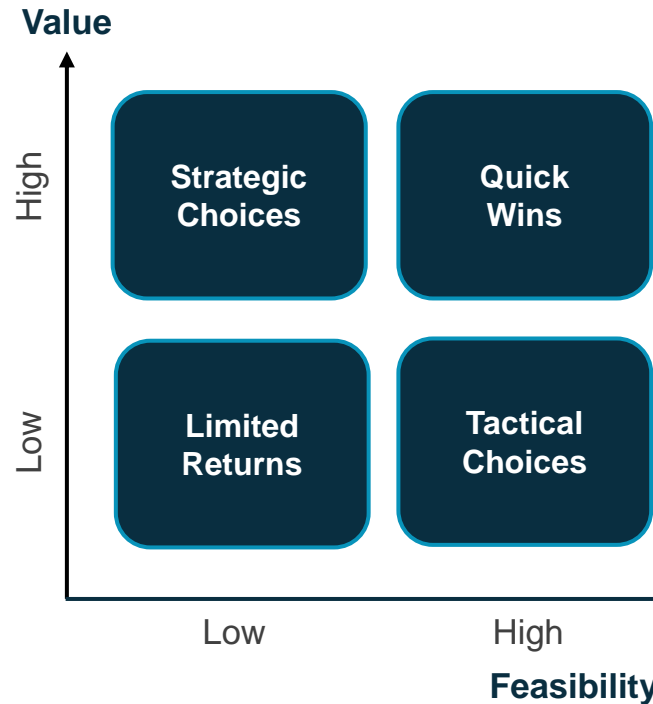
# 2. Select Use Cases

Identify use cases relevant to your business by leveraging the AI Opportunity map. This is a crucial step to demonstrate early successes and build momentum. Then use the Impact vs Feasibility matrix to prioritize further based on feasibility and value.

 **Feasibility**  
Ease of implementation (deployment cost, complexity and risk)

 **Value**  
Increased efficiency and/or revenue

## Impact Vs Feasibility



## Guidelines for Use Case Selection

- ✓ Prioritize the **Quick Wins** first. They are easy to implement and offer significant business benefits.
- ✓ Choose **Tactical choices** during phase 1 of the full deployment. Their cumulative effect can be significant, even if individual impacts are low.
- ✓ Push **Strategic choices** for later stages of the full deployment. They require more resources and preparation but promise substantial returns.
- ✓ Avoid **Limited Returns** opportunities. They are unlikely to justify the investment in terms of time or resources.

[CONTACT US](#) If you need help defining your AI ambition or selecting use cases

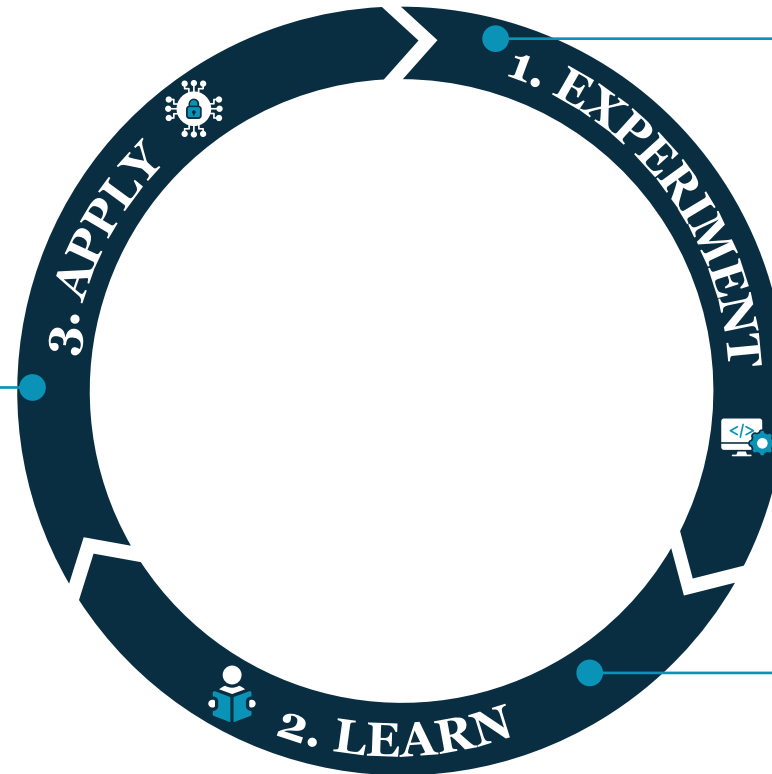
# 3. Train and Upskill

## Apply in a Controlled Environment

Once you have a solid understanding of prompting and LLMs, begin applying these skills in a controlled environment.

Microsoft Copilot is a good generic tool to begin testing your use cases. It integrates seamlessly with existing office tools while ensuring data security.

**Words of caution:** Maintain high data security standards, especially when handling sensitive proposal information.



## Experiment with Large Language Models

Begin by experimenting with advanced Large Language Models (LLMs) like ChatGPT or Bard. These platforms allow you to familiarize yourself with AI's capabilities and limitations without significant upfront investment.

## Learn Prompting Skills

**Skill Development:** The effectiveness of AI tools largely depends on how you interact with it. Learning how to craft precise prompts specifically for proposal scenarios is crucial.

**Recommended Course:** "AI Powered Proposal Engineer (APPE)" is a course designed to teach you the intricacies of effective AI prompting specifically in the context of Bids & Proposals.

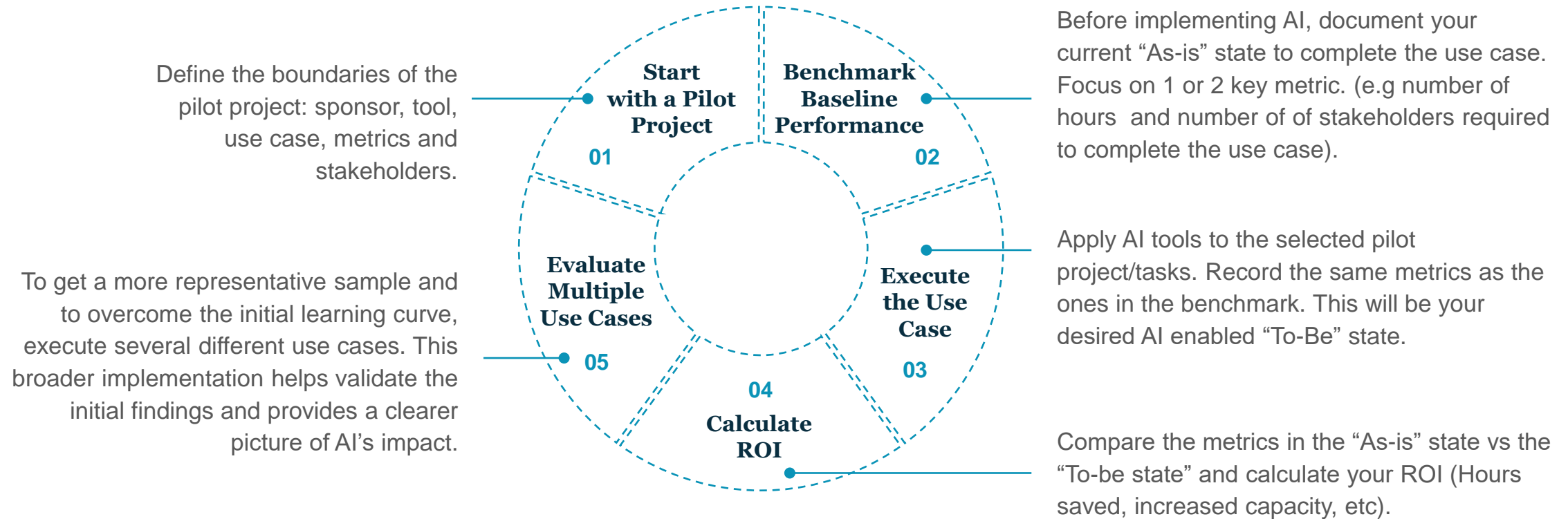
[Link to APPE course](#)

[CONTACT US](#) If you need AI tools or training courses recommendations

# 4. Demonstrate Proof of Value

Demonstrating the benefits of AI is imperative. This 5 steps approach provides quick time to value.

## 5 Steps to demonstrate Quick time to value



# 5. Establish Feedback Loops



## Iterative Refinement

AI requires ongoing refinement of the human-machine interface and the continuous evaluation of output to truly harness its capabilities.

Moreover, Generative AI demands a nuanced approach where feedback loops are crucial, ensuring that technology integration is responsive, iterative, and truly aligned with human input and organizational needs.



## Stakeholder Engagement

Actively involve a range of stakeholders from the outset to gather diverse insights and foster ownership, which is crucial for smooth adoption and effective utilization of AI technologies.

# Full Deployment Considerations

## Comprehensive Planning

Transitioning to a full AI deployment requires careful planning across several key areas.

It's crucial to consider all the facets that will impact the success and sustainability of the technology integration.

We have developed a proprietary methodology to systematically address all the challenges and ensure a successful deployment.

The [AI Value Proposition Canvas For Bid Response](#) provides a high-level view of our methodology and the key deployment considerations.

## AI Value Proposition Canvas for Bid Response

<p><b>1. Problem</b></p> <ul style="list-style-type: none"> <li>• What is our AI <b>ambition</b>?</li> <li>• What are the GenAI <b>opportunities</b>?</li> <li>• What <b>problems</b> are we trying to solve?</li> <li>• Which <b>uses cases</b> will validate the Proof of Value?</li> </ul>	<p><b>2. Value Proposition</b></p> <ul style="list-style-type: none"> <li>• What are the expected <b>benefits</b>?</li> <li>• What is the business <b>impact</b>?</li> <li>• What is the link to the <b>business strategy</b>?</li> </ul>	<p><b>4. Barriers To Adoption</b></p> <p><b>Feasibility</b></p> <ul style="list-style-type: none"> <li>• Is the technology ready?</li> <li>• Is it the technology cost effective?</li> <li>• Does it blend with existing workflows?</li> </ul> <p><b>Readiness</b></p> <p>What is our internal readiness? (AI literacy, Culture, Data, Content)</p> <p><b>Bid Desk Maturity</b></p> <p>What is the maturity level of our Bid operations? (Ad-hoc, Tactical, Strategic, Digitized, Predictive)</p>	<p><b>5. Tools/ Processes/ People</b></p> <p><b>Training and upskilling</b></p> <ul style="list-style-type: none"> <li>• What is the knowledge gap?</li> <li>• How much upskilling do we need?</li> <li>• What kind of training is required?</li> </ul> <p><b>Process redesign and workflow optimization</b></p> <ul style="list-style-type: none"> <li>• What is our current "As-is" state?</li> <li>• What is our desired "To-be" state?</li> </ul> <p><b>AI Tools selection (Bid volume/ Bid complexity)</b></p> <ul style="list-style-type: none"> <li>• Generic</li> <li>• Specialized</li> <li>• Niche</li> <li>• Customizable tools</li> </ul>
<p><b>3. Costs and Revenue Enablement</b></p> <p><b>Cost savings</b></p> <p>What are the expected cost savings?</p> <p><b>Business model</b></p> <ul style="list-style-type: none"> <li>• Build vs buy analysis</li> <li>• Acquisition and implementation cost</li> <li>• Maintenance and recurring cost</li> </ul> <p><b>Revenue generation</b></p> <ul style="list-style-type: none"> <li>• What is the expected increase in bid volume and win rate?</li> <li>• How much revenue will it generate?</li> </ul>		<p><b>6. Deployment Strategy</b></p> <p><b>Deployment models</b></p> <ul style="list-style-type: none"> <li>• Pilot projects</li> <li>• Incremental implementation</li> <li>• End-to-End integration</li> <li>• Partnerships and collaboration</li> </ul>	<p><b>8. Data and Governance</b></p> <p><b>Governance framework</b></p> <ul style="list-style-type: none"> <li>• Which data is required?</li> <li>• What is our data quality?</li> <li>• What is our data governance framework?</li> <li>• What is our data policy?</li> <li>• What is our content management plan?</li> </ul>
		<p><b>7. Change Management Strategy</b></p> <p><b>Change management and risk mitigation</b></p> <ul style="list-style-type: none"> <li>• Do we have strategies for change management?</li> <li>• What is our risk mitigation plan?</li> </ul>	<p><b>9. Metrics and Timeline</b></p> <p><b>Goal setting framework</b></p> <ul style="list-style-type: none"> <li>• Which metrics and OKR will be used to measure performance and impact?</li> <li>• What is the timeline for implementation?</li> </ul>





# Leverage Expert Guidance

Given the complexities involved, partnering with experienced consultants can be invaluable.

Our services provide expert assistance in navigating each of these areas, ensuring your AI deployment is well-planned and effectively executed.

**Are you ready to supercharge your bid team with AI?**

## Book a Free Strategy Call

Will dive into your business specifics and assess how we can guide you towards your AI implementation goals.