



# Winning Contracts through Automated Proposal Management

The Impact of Automation on Proposal Professionals

[VisibleThread.com](https://www.VisibleThread.com)



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# Automation Is Defining a New Standard

Going into 2023, the government contracting industry remains healthy, although change remains constant. Shifting market dynamics and procurement trends are reshaping the competitive landscape. Automation of business and proposal management processes is the most dominant trend in the industry, according to industry leaders speaking at VT Summit.<sup>1</sup>

Changes in procurement strategies and priorities within government agencies are also having an impact.

Contract consolidation and the increased use of Indefinite Delivery/Indefinite Quantity (ID/IQ) contracts remains an important trend within many agencies. Bloomberg Government described the trend as “fewer and larger contracts going to fewer and larger companies.”<sup>2</sup> To compete, contractors must adopt more efficient processes and deliver higher quality proposals.

In parallel, the federal government is also prioritizing Small, Disadvantaged Businesses (SDBs). The White House recently set a goal of increasing SDB spending to 15% annually by FY 2025.<sup>3</sup> The General Services Administration (GSA) targeted 21% of agency-wide prime contracts to come from SDBs by FY 2022.<sup>4</sup> With such substantial funding opportunities for small businesses, winning more projects does present challenges.

The tight labor market and ongoing skill shortages means that employers must curtail excessive work weeks and avoid burnout. Business development and proposal teams have been particularly affected by this trend. The demand for skilled proposal professionals increased as the pandemic ended, and this coincided with high levels of procurement activity from government. While burnout is not a new problem for the industry, it is a major contributory factor to the increase in turnover rates.

**Automated tools and processes are becoming the standard for contracting organizations that excel at business development and proposal management.**

1 The VT Summit 2022 in Washington, DC, provided a forum for VT, our partners, and our customers to discuss the state of the industry and how VT products are making an impact. Industry leaders provided the best practices and recommendations.

2 Murphy, P. (2022, April 12). Less money-again-forecast for entire fiscal 2022 contract spending. Bloomberg Government. Retrieved June 18, 2022, from <https://about.bgov.com/news/less-money-again-forecast-for-full-fiscal-2022-contract-spending/>

3 The United States Government. (2021, December 2). Fact sheet: Biden-Harris Administration announces reforms to increase equity and level the playing field for underserved small business owners. The White House. Retrieved June 18, 2022, from <https://www.whitehouse.gov/briefing-room/statements-releases/2021/12/02/fact-sheet-biden-harris-administration-announces-reforms-to-increase-equity-and-level-the-playing-field-for-underserved-small-business-owners/>

4 GSA announces ambitious new goal to support small, disadvantaged businesses in federal contracting. U.S. General Services Administration. (2022, March 24). Retrieved June 18, 2022, from <https://www.gsa.gov/about-us/newsroom/news-releases/gsa-announces-ambitious-new-goal-to-support-small-disadvantaged-businesses-in-federal-contracting-03242022>



The competition is tough, so insightful companies are working smarter, not just harder. They use automation solutions like VisibleThread to help staff work smarter with better quality outcomes, absent the excessive working hours. And this directly leads to higher staff retention rates.

Automated tools and processes are becoming the standard for contracting organizations that excel at business development and proposal management.

Platforms like VisibleThread allow teams to automate the tedious, time-consuming and error prone aspects of compliance, and streamline the proposal management process. Tools like VisibleThread allow teams to automate the administrative aspects of compliance and streamline the proposal management process.

## How Automation Supports Growth

Automation and process improvement were themes frequently discussed during VisibleThread hosted industry webinars and at VT Summit 2022. Industry professionals view automation as one of the best tools for boosting win rates. While also reducing burnout among proposal professionals.

The insights and trends discussed at the summit reinforce the central role of process automation in improving win rates. As well as sustaining growth and reducing burnout among proposal professionals and key contributors.

## You Must Win to Grow

Consistently winning is the only way to sustain growth. Yet orchestrating the people and resources needed to develop winning proposals can become progressively more difficult. Organizations grow by winning and delivering profitable new programs.

At the same time, growth, business development and proposal professionals must strive to build a pipeline of future work to sustain revenue. Key contributors can be stretched to the limit during this phase of growth. Organizations in this situation must adapt to do more with less.

But how can companies get more done without working more hours, sacrificing quality, or overworking key personnel? The answer is automation.



# The Right Tools

Automation technologies are defining a new standard for government contractors. Platforms such as [VisibleThread](#) are no longer optional for companies' intent on sustaining long-term growth through winning competitive awards. Automation is crucial.

Automation is also altering the landscape of business development and proposal management by becoming central to business processes. In many cases, organizations are redesigning processes around their automated systems to maximize efficiency.

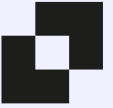
## At the Team Level

Bid and proposal teams seek to build a pipeline of pursuits that sustain growth and provide continuity for organizations. In most organizations, winning more work depends on writing better, more compelling proposals faster than ever before. To deliver, teams need the right tools.

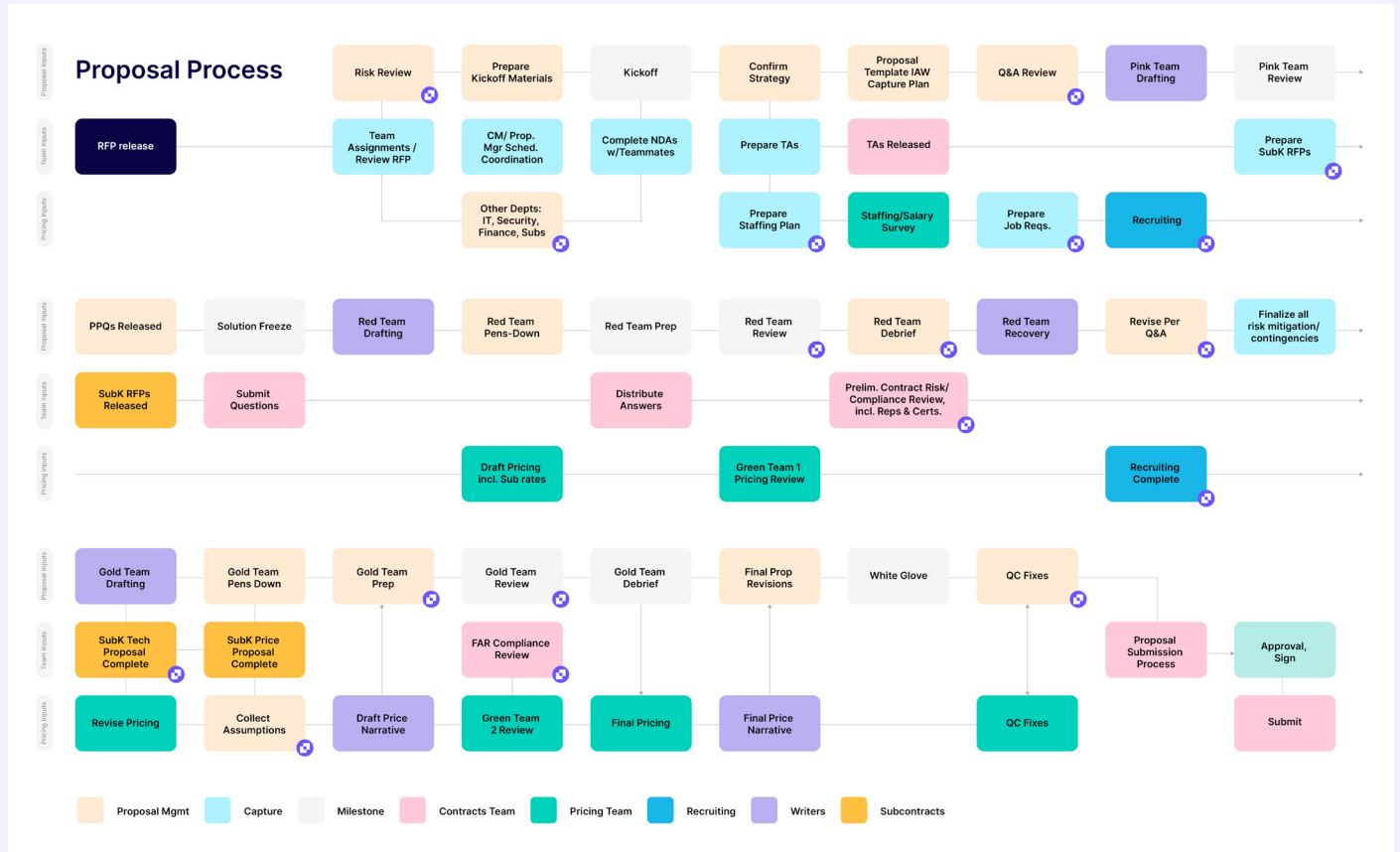
There are many things to consider when looking at automation solutions. However, it is vital that the solution a company chooses delivers certain requirements from day one. [Marcia Watson](#), Senior Director of Proposal Operations at Cherokee Federal, advised that the automated tools and platforms selected must:

- **Improve daily work life for staff**
- **Help employees do their jobs faster**
- **Build confidence for end users**

Cherokee Federal uses a thoughtful and systematic approach to proposal management. Cherokee incorporates VisibleThread at critical points in their proposal process to glean information and to guide their decision-making process. Now, they can qualify bids and move them through the proposal process more easily to increase the number of opportunities in their pipeline.



This diagram shows the Cherokee proposal process, and the VisibleThread icons show where they use automation.



Read more on how Cherokee streamlined its proposal process in our free executive summary – [Strategies for Successful Proposal Management](#).

Automated tools should make the work performed by proposal professionals easier to complete. For example, with VisibleThread you can complete tedious manual tasks in minutes rather than hours. Quick wins include automating shredding to [create your compliance matrix](#), requirements gap analysis, acronym checks and readability analysis.

Automating time-consuming yet essential processes gives employees back more time. This allows them focus on the more strategic elements of the proposal. In many cases, the ability to quickly shred and analyze solicitation documents also builds staff confidence. With these tools in hand, professionals can make better, evidence-based decisions faster with a reduced risk of errors.



## **VTDocs helps proposal teams to:**

- ✓ Shred RFPs and create compliance matrices in minutes
- ✓ Make faster bid/no-bid decisions
- ✓ Align proposals with win themes
- ✓ Analyze language and readability to improve clarity and establish a single tone of voice
- ✓ Flag critical FARS/DFARS and flow-down clauses
- ✓ Extract and manage acronyms
- ✓ Improve proposal quality, reduce risk, and win more business

Managing proposals is demanding work that can challenge even the most experienced and well-resourced proposal teams. This can motivate professionals to greater success by having tools that accelerate decision-making. And enable them to contribute more toward their organizations' success.

## **VTDocs is powered by data and designed for large and growing organizations.**

- ✓ Deployable on-site for highly regulated environments and compliant with HIPAA and NIST regulations
- ✓ Scalable to tens of thousands of users
- ✓ Customizable for single sign-on for easy IT administration
- ✓ Adaptable for multiple deployment options, either as a virtual appliance or unbundled to support Linux
- ✓ Deployable to private cloud environments such as AWS Gov Cloud and Azure Government
- ✓ Rapidly implemented and can be up and running in hours
- ✓ Can track and display user engagement and ROI metrics with user-friendly dashboards



## Across the Organization

Automated proposal management solutions are also changing the landscape of business development at the organizational level.

Tools such as VT Docs are becoming integrated throughout organizations, linking the various departments that contribute to proposal development. VisibleThread customers are integrating the platform into operations, HR, contract management, and pricing processes related to bids and proposals. These companies see significant positive impacts across the entire business development lifecycle.

There are immediate benefits at the front end of the proposal process too as you streamline and optimize bid/no bid decisions.

These solutions can align business development and proposal teams when evaluating a particular opportunity or required qualifications. For example, VisibleThread can identify the requirements and produce a list of the organization's relevant qualifications. With the same list of requirements and qualifications in-hand, business development and proposal staff can make faster, more informed decisions.

[Fred Vlchek](#), Director of Business Development (BD) Operations at [Pragmatics](#), shared his insights on a VisibleThread webinar last year. He showed how they use data to make better bid/no bid decisions.

VisibleThread customers are also using the platform to further integrate HR and legal departments into their proposal processes.

Departments can share staffing requirements with recruiters from the outset when you first shred the solicitation documents. Likewise, you can share essential contract requirements with legal staff to allow adequate time for review.

At the end of the proposal lifecycle, you can provide requirements to project management staff facilitating a smooth kickoff.

**You can view the on-demand webinar here**

Webinar

**Using Data to Make Better Bid/No-Bid Decisions and Improve Win Rates.**





# Success Starts with Strong, Proposal-centric Alignment and Processes

Organizations that consistently win have strong, proposal-centric processes. It is possible to win based on heroic efforts from key staff. However, less disciplined approaches are unsustainable and will result in lower win rates and increased attrition due to burnout.

The reality is that every government contracting organization should consider itself a proposal-centric organization first. You can reflect that commitment in the org chart and alignment of departments and business units.

[Jennifer Adeli](#), CEO, and founder of [WinBiz Consulting](#), illustrates the central role of proposal teams. She points out, if you are a government contracting firm, proposal management needs to feature in your org chart. “I would argue that if you are a government contracting firm, proposal management needs to be in the middle. But honestly, you cannot grow in government contracting if you don’t win.” Winning takes coordination and cooperation between numerous departments. Including bids and proposals, cost and pricing, operations, HR, legal, travel, and more. Rather than thinking of the proposal team as an appendage. It makes more sense to think of it as being centralized. Proposal teams play a vital and centralized role in orchestrating all the organization’s resources.

Organizations should adopt processes and tools that help center the proposal management function. And focus the attention of stakeholders across the organization.

**“I’m constantly driving our clients to have a proposal-centric mindset. HR needs to be thinking about resumes for proposals. Ops needs to be thinking about accolades and data for proposals. BD needs to be thinking about how their work translates to proposals. The CFO needs to be thinking about pricing and wrap rates. So instead of it just being this box off on the side where this weird magic happens at 2:00 in the morning, what would our org chart look like if we put proposals in the middle?”**

Jennifer Adeli, CEO, and founder of [WinBiz Consulting](#)



[Karnita McElveen](#), vice president of operations and the program management office (PMO) at [American Management Group \(AMG\)](#). Explains how proposal-centric tools such as responsible, accountable, consulted, and informed (RACI) charts are excellent tools for proposal teams. “If you want to help me help you, I need you to understand. So, if I give you a list of everything that you’re responsible for. Or I create a RACI matrix, and you already know what I need, so you’re more inclined to help.” RACIs identify and communicate the unique responsibilities of each person on a proposal team. They are particularly important for large organizations, which often staff proposal teams with individual contributors from multiple departments.

While creating a RACI matrix is a tedious manual process, VTDocs can [create a RACI](#) within moments. Just upload the SOW, and with just a few clicks, VT will produce an editable spreadsheet that assigns every proposal requirement to a specific department.

There is no substitute for organization, discipline, and established processes. For organizations still developing their processes while looking to scale, proactive planning and documentation are critical. [Stephanie Zink](#), president of [Taurus Group, Inc.](#), recommends. “Sitting down and identifying the people, processes, tools, and gaps, and identifying how you’re going to fill those gaps.” Going a step further, companies should also get specific in the planning phase. And document plans to create actionable steps to get you the answers you need.

## Gain Qualitative Improvement Faster

Companies that win consistently recognize that compliance checks reduce the risk of disqualification. They also know that carefully checking their work makes them more likely to win. Several VT Summit participants shared that automation is the critical ingredient for expediting due diligence. While making qualitative reviews more productive.

**“Take a look at gaps — and also things like not only financial goals, but human resource goals that you have — and bringing in the people you need to fill those gaps, or even the systems you need to fill those gaps. And so things like VT — it’s a tool that can help you support growth. Look for things that can automate, because what you get is your time back.”**

Stephanie Zink, President, [Taurus Group, Inc.](#)



Tools such as VTDocs allow companies to accelerate through the administrative aspects of compliance. Creating compliance matrices, [extracting, and validating acronyms](#), and flagging gaps are all streamlined to save time. Organizations can compound VisibleThread's value-add as the proposal process shifts toward qualitative analysis of proposals.

[The Discovery feature](#) within VTDocs is another powerful AI driven function. It uses natural language processing to gather key themes from documents. For example, checking common themes in RFP's or a Statement of Work against past contract documents for volume or data calls.

Panel participants at the VT Summit noted that VisibleThread benefits red team reviews. A critical step in the proposal process, red teams are one of the final reviews conducted by proposal teams. In most proposal processes, the red team conducts comprehensive reviews of advanced proposals that are close to the finished product. Red team reviewers take the place of the officials who will evaluate proposals for the funding agency. The Red team should focus on adherence to win themes and opportunities to improve the strength of the proposal.

**“How do you get more proposal managers? Well, you show me. You show them the other panelists. Because of the knowledge I gained from being a proposal manager and touching all aspects of the organization, now I can do operations. I can do PMO. I can go back into BD. People know I have that skill. So that is the value of VT.”**

Karnita McElveen, Vice President of Operations and PMO, [AMG](#)

However, many red team reviews get sidetracked by other issues. Compliance-related concerns, unclear language, inconsistent use of acronyms, and other non-technical concerns can bog down reviews. Summit panelists noted that VisibleThread provides several tools that help keep red teams on track and focused on quality.

At its core, VisibleThread is a language analysis platform, and it excels at readability and narration analysis. The technology ensures that all the combined contributions from multiple writers and reviewers are both highly readable and consistent. Proposal teams can fine-tune readability before the red team's review. This ensures that you will not distract the reviewers with inconsistent language.

As red teams receive a more readable proposal, their input can go further in improving the overall substance. Honing the essential messaging and proposal elements in this final step should directly impact scoring.



# Empower Proposal Professionals to Grow with the Company

During multiple sessions at VT 2022 Summit, professional development and retention of proposal professionals were frequent discussion topics.

Participants pointed out that proposal professionals are growing into leadership positions. Their role has become more recognized. And proposal managers are moving into key positions in the business units they support. Across the board, panelists noted this is a positive development for both proposal pros and their employers.

Proposal managers build relationships and institutional knowledge through leading the proposal process. They have the opportunity to grow into new roles, responsibilities, and careers. Their employers also benefit by building proposal expertise across the organization. The best track for companies to take is to encourage this growth. Employers should also equip proposal managers with the tools they need to support multiple business units and capture efforts. This will help them be successful and reduce burnout and turnover.

## Automation Is Transforming Business Processes

Smart automation is transforming business development processes and the proposal industry. For both established and growing organizations, solutions like VisibleThread are no longer a nice to have. They have become a necessity.

### Technology keeps the talent happy

Some consider automation as a threat to their job security. In fact, quite the opposite is true. Successful proposal professionals with experience of automation are in demand. They have a stronger bargaining position when it comes to career progression. As the value-add is a serious competitive advantage for forward-facing organizations.



Leading companies recognize the trend and are investing in their systems and employees to increase win rates and retention. Ultimately, the proposal industry consists of a relatively small number of professionals who are proven winners. The companies that understand the value of technology can hire and retain those winners.

**“We’re seeing people leave in record numbers. We don’t call it the Great Resignation as most people do. We call it the Great Free Agency. People are changing all the time. But there are ways to mitigate this burnout. So what we’re saying is invest back into the worker. When they want a great program like VisibleThread, listen to them. Don’t just reflexively say no anymore. Listen to what they want.**

**This is a time that’s unprecedented, where the employee has an advantage — a distinct advantage because their talents can go elsewhere. And we don’t want them to go elsewhere. If winning is the most important thing in our industry — and it is, let’s be honest. Then we must invest back in our employees.”**

Rick Harris, CEO, [APMP](#)



## Automation is mainstream

Automated proposal management tools are quickly becoming the industry standard. Some forward-leaning companies are doing more than adopting discrete automation tools. Several VT Summit panelists shared how their companies are integrating technologies to orchestrate complex processes and maximize ROI.

You can integrate proposal management tools such as VT Docs with Robotic Process Automation (RPA) technologies. And, with data visualization tools like [Tableau](#) taking feeds from VT Docs helping automate solicitation analysis. [Brandon Costanzo](#), solutions director at [General Dynamics Information Technology \(GDIT\)](#) explained how his team generates a rich graphical output that supports internal selling efforts using data from VT Docs. The outputs generated enable Brandon's team to create proposal-specific capability statements. With relevant proof points at the beginning of the process.

**“So what my team will do is take our data dictionary and leverage robotic process automation (RPA) to scrape these proposal documents and bring them down. We will then go in and do an analysis... So, what this means for me, as part of an internal selling organization, is that I need to have the ability to sell these services for our customers... Not only do I perform on those services, but I also have these capability statements that I can provide that you can then put into your proposal with relevant proof points that will help you win that work.**

**So what's really interesting is when we're leveraging RPA, my key input there is my VT data dictionary that I've developed. I pull it down and shred that document. I use the output to create the discovery dashboard. Future state for me is basically creating something where we're trying to do proposal-as-a-service. So then, taking it to the next level, taking those capability statements and putting them in a cohesive 50% to 75% written proposal. The connective tissue, what pulls it all together, is VT — right?”**

Brandon Costanzo, Solutions Director, [GDIT](#)

Teams have adopted automated tools such as VT Docs cross-functionally across organizations, outside of proposal functions. [Nicole Poppenberg](#), counsel, and export compliance manager at [Eaton Mission Systems](#). Explained how her teams use automated tools to build efficiencies across departments. You can ensure compliance and quality standards are met before approving an opportunity by working together. Within Eaton, various teams are using VT Docs. Including quality, contracts, legal, and trade compliance teams to vet opportunities early in the process.



## Using Automation in the Proposal writing Process

In our on-demand webinar – [The Art of Proposal Writing](#), we brought together some experienced proposal writers. As well as discussing the use of automation in their process, they shared tips to keep in mind when writing your proposals. Here is a snippet of the insights they shared.

Use consistent templates to support a single tone of voice, coherence, and efficiency. Understanding what the structure is going to look like and making something that is repeatable. Not only in a specific proposal but things you can re-use in additional proposals.

Create watchword lists to check for troublesome words and definitions. Creating your own style guide with key terms, references, and key themes, so that everyone is writing the same way. This results in a much more cohesive proposal.

Identifying patterns and key terminology within customer documents. Understanding consistencies will allow you to address underlying pain points and effectively communicate your value proposition.

Craft a cohesive message in a consistent tone. By using dictionaries and watch word lists, you can shape the style of contributors. And control the level of complexity. Your message should be clear, concise and customer centric. Think of the customer and speak to their “why”. The value that you are going to bring to the partnership. And why you are the correct person to partner with.

[Rick Harris](#), CEO at [APMP](#), points out that the industry has seen tremendous growth in automated software vendors. Which reflects the increased interest and investment in the industry.

**“But what we all have to do is embrace that there is a wave toward automation. We need to embrace it, and we need to accept it. We need to move forward. The time of doing things manually is done. It’s over. Let’s get on the automated bus and follow these leaders.”**

Rick Harris, CEO, [APMP](#)

### Download our free guide





The most prominent VT Summit theme discussed was the critical role of data and automation in building winning proposals. Automated tools are accelerating the proposal process while simultaneously helping proposal teams make more informed decisions. Automation is also playing a key role in further integrating organizations by facilitating seamless collaboration and connectivity.

Success in this industry is made possible by people who collaborate to write winning proposals. Automated tools are helping those people excel more than ever.

## BVTI

**\$20m**

Successful submissions

**100%**

QA Accuracy

**BVTI** won a \$20 million contract after a successful on-time submission. They saved 18+ hours in the final critical week and achieved 100% accuracy during their final QA check.

## AIRBUS

**\$50 - 100K**

Airbus saves between \$50k – 100k per bid in the final proofreading stage of proposal responses.

**AIRBUS** is the European leader in the Defense and Space sector. Their diverse product portfolio ranges from aircrafts to cyberspace.

**Context:** AIRBUS underwent a Digital Transformation Program. The goal of this program was to improve quality, efficiency, and teamwork company wide.



**20 down to 12**

Pragmatics introduced readability grade level scoring into their process. Using the Readability Reports, documents went from a grade level of 20 down to 12 or lower. Making them easier to understand.

**Pragmatics, Inc** is a leading Cloud, Development, Security & Operations (DevSecOps) and Data solutions provider.

**Context:** Pragmatics were looking for a more streamlined way to bid on pursuits. They needed to improve the use of their time to make better bid decisions.





# The Value of the Proposal Writer

Automating labor-intensive parts of the proposal process is a big win and gives your proposal manager back valuable time to focus on content. This doesn't take away from the value of a proposal manager, rather it frees them to be more strategic. It enhances the processes and quality of what they need to review. This allows proposal managers to focus more on the strategic elements of the process.

In conclusion, the proposal management industry is undergoing a significant shift in the way it operates. The growing demand for efficiency and speed, combined with the need for high-quality proposals, is reshaping the competitive landscape. Automation plays a central role in this transformation. With platforms like VisibleThread, companies can streamline their proposal process and increase their chances of success.

Automated proposal management solutions can be deployed across the entire organization. They can help to build knowledge and strong relationships between proposal managers and stakeholders. Despite concerns that automation might threaten job security, the opposite is true. It has only made the role of proposal professionals more valuable. Successful professionals who embrace automation are in high demand and in a stronger bargaining position career-wise.

Automation is quickly becoming the industry standard in today's fast-paced business environment. By embracing automation and deploying the right tools, companies can streamline their proposal process, grow faster and win more.



# Are you interested in learning more about VT Docs?

Register for our no-obligation live demonstration.

Live demo

**Need help or have a question?**



Talk to us by mailing [info@VisibleThread.com](mailto:info@VisibleThread.com) to find out how you can avoid these mistakes.