

 VisibleThread

# SUMMIT 24

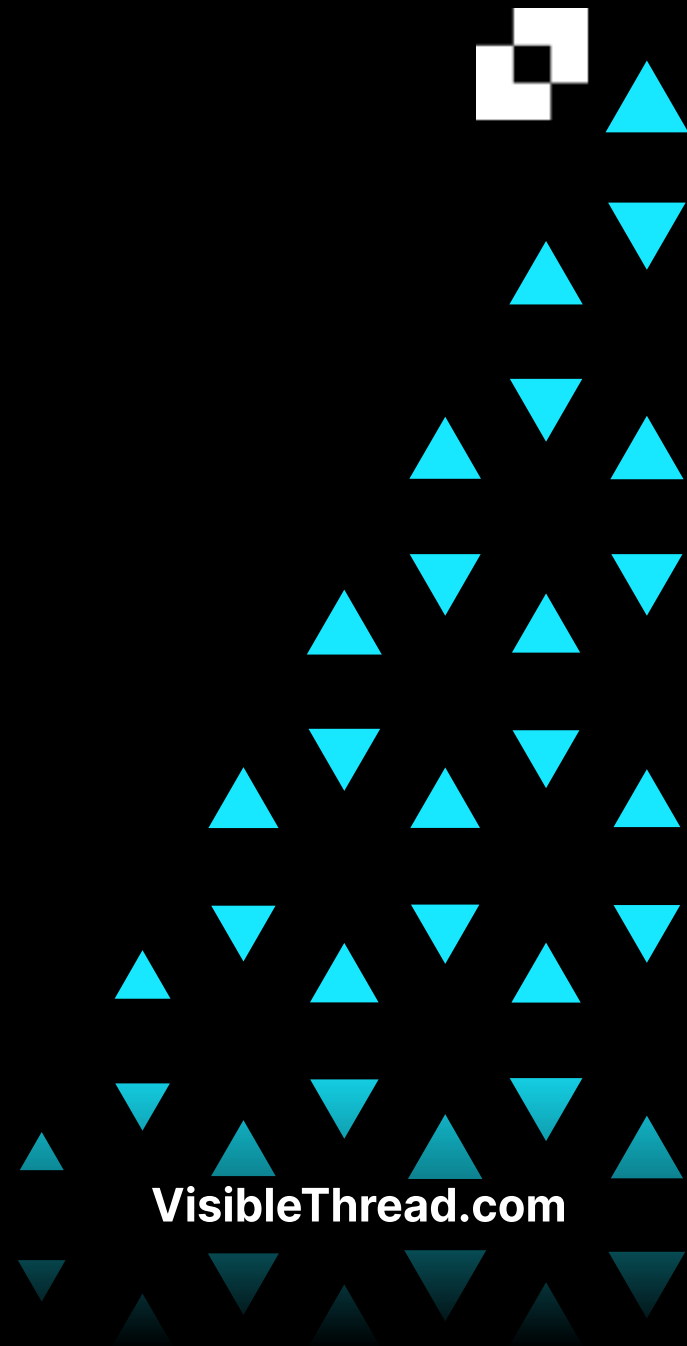
THE RFP SOFTWARE CONFERENCE

Date

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7th of November, 2024, 8:30 AM - 2:00 PM

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



# Agenda



01. Opening Remarks and Welcome

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02. Customer Case Study – L3Harris

---

03. Our Vision for the Future

---

04. Bid and Proposal Trends, Best Practices and Automation

---

05. Leveraging Data for Contract Vehicle Analysis

---

06. Customer Case Study – Trust Income Equity

---

07. Generative AI Prompting for GovCon Success

---

08. Closing Remarks

---

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**SUMMIT 24**

THE RFP SOFTWARE CONFERENCE

# Networking and Lunch



Please take a moment and review us on Capterra!

VT Docs



VT Writer



VisibleThread.com

VisibleThread

# SUMMIT 24

THE RFP SOFTWARE CONFERENCE



Next Session

# Our Vision for the Future



Fergal McGovern  
VisibleThread

2023



# The AI 'gold rush' is here

*The Washington Post*

2023



# Generative AI Promises an Economic Revolution

THE WALL STREET JOURNAL.

2023



# How Could A.I. Destroy Humanity?

*The New York Times*

2023

**The AI 'gold rush'  
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*The Washington Post*

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THE WALL STREET JOURNAL.

**How Could A.I.  
Destroy Humanity?**

*The New York Times*

2024



**The AI Hype Bubble  
is Deflating**

*The Washington Post*

**The AI Revolution  
is Losing Steam**

THE WALL STREET JOURNAL.

**What Ever Happened to  
the AI Apocalypse?**

*The New York Times*





# False Hype or True Revolution?



# These Aren't the Questions We Ask Ourselves!



# The Real Question: How Do I Drive Growth & Efficiency?

# Efficiency & Quality Improvement



Compliance & Risk,  
FAR/DFAR Reviews,  
Contract Comparison

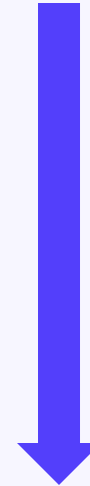
**66.7%  
Faster**



**79 Hrs**

- Review of troublesome terms
- Version comparison
- Acronym management
- Extract FAR/DFARs
- Pricing
- Review RFPs vs bid
- Readability scoring
- Contract annotation

**Before VT**



**12.3 Hrs**

**After VT**



## 2. The Challenges We Face

# Our Challenges:



\*Based on 42 medium to enterprise organizations



# Our Challenges:



**91%**

Inefficiencies affecting project timelines.

\*Based on 42 medium to enterprise organizations



# Our Challenges:



91%

Inefficiencies affecting project timelines.

66%

Find their data processes neutral or ineffective.

\*Based on 42 medium to enterprise organizations





# Our Challenges:



91%

Inefficiencies affecting project timelines.

66%

Find their data processes neutral or ineffective.

90%

See a direct link between inefficiencies and reduced ROI.

\*Based on 42 medium to enterprise organizations



## Competitive Market:



**Increased competition**  
#1 challenge facing  
business development

**Deltek.**

*“Looking ahead to 2025,  
the GovCon market  
remains intensely  
competitive.”*

Clarity 2024: Government Contracting Industry Trends and Benchmarks in North America and Canada Study



# 3. Technology's Impact on the RFP Process

# Connecting the Right Technology with Value



## Comply with Requirements

Dictionary Search  
Power search across docs, check technical terms, contract terms etc.

View

Shred to Excel

Simple Shred (Compliance Matrix)  
Category Shred

Document	Term	Location	Body
18	367	4	
34	240	24	
3	68	9	
	29		
	10		
1	4	4	
	4		

Increased Win Rates

## RFP Data Analysis

VT Docs | Folders

Discovery

NASA SOW

- NASA SOW.pdf
- Response NASA SOW.docx

Example 2 - Contracts

Example 3 - OASIS+

Example 4 - Resumes

Network 110

Data 102

TXZ 20

Better Use of Resources

## Contract Analysis

Summary | Discovery | Dictionary Search | Readability | Activity

Shred to Excel

Dictionary VT - Contract Terms Review

Categories (5)	Freq	Term(s)	Location	Body
Liability - Damages (6 items)	23		default terminated	Page 54 All proposed new CTA in CTA proposes replacem to perform under the co
libar*	5			
damage*	5	damage*	Pa1	
pernat*	5	breach	Pa1	
indem*	5	damage*	Pa1	
liquidated damages	5			
negligen*	3	termination	Pa1	
Warranty (10 items)	24	libar*	Page 64	52.228-7 Insurance
Termination - Force Majeure (7 items)	21	termination	Page 64	52.240-6 Termination

terminated

Damages

Lower Risk, Reduced Friction

## Secure AI Content Creation

Create

Start an RFP document

Start a Corporate Communication document

Start a Legal document

Sta Long Sentence

Exp 58.32%

Sta Very Long Sentence

Sta Hidden Verb

Sta Long Words

Sta Watch Words

Simplify

Higher Quality RFPs

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Exp 58.32%

Sta 4. "A review of your account reflects that you..."

Sta Very Long Sentence

It is 45 words long. Consider bullet points or lists.

Hidden Verb

Try to rephrase these using their verb forms.

2 Long Words

Long Words are words with more than 3 syllables.

4 Watch Words

"proceed" (Plain language) Plain language choic.

Simplify

Higher Quality RFPs

# Connecting the Right Technology with Value



## Comply with Requirements

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Filters:

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<input checked="" type="checkbox"/> Termination - Force Majeure (7 items)	21	termination	Page 64	52.240-6 Termination

Lower Risk, Reduced Friction

## Secure AI Content Creation

Create

- Start an RFP document
- Start a Corporate Communication document
- Start a Legal document

Document Statistics:

Stat	Value	Stat	Value	Stat	Value
Long Sentences	58.32%	Passive Voice	18.07%	Readability	13.8
Exp		Alt		Oratio	

Simplify

Very Long Sentence: 4. 'A review of your account reflects that you...'  
It is 45 words long. Consider bullet points or lists.

Hidden Verb: Try to rephrase these using their verb forms.

2 Long Words: Long Words are words with more than 3 syllables.

4 Watch Words: 'proceed' (Plain language) Plain language choic.

Higher Quality RFPs

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Simplify

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# The VisibleThread Landscape



## Pre-RFP/Capture:

- Market Analysis
- Competitive Assessment
- Assessment of Prior Solicitation
- Bid/No Bid Analysis
- Risk Assessment
- Past Performance Analysis
- Price to Win Support.



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## Proposal Development Support

- Compliance Matrix Shred
- Requirements Identification
- Acronym Extraction and Management
- Win Theme Analysis and Adherence
- Amendment Management
- Gap Analysis
- Thematic Assessment
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- Past Performance Analysis

# The VisibleThread Landscape



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- AI Writing Assistant
- AI Outline Creation
- Readability Assessment
- Grade Level Assessment
- Quality Scoring
- Application of Style Guides
- One-Voice Assurance

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- Past Performance Analysis
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## Contracts/Legal

- Risk Assessment
- FAR/DFAR Extraction
- Contract Version Comparison
- Business Risk Assessment
- Amendment Management

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## Post-Award

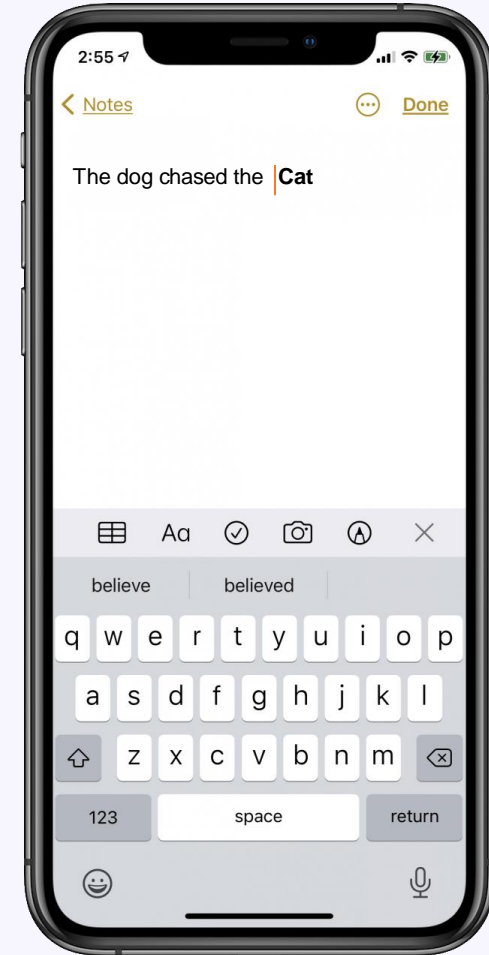
- Competitor Submission Assessment
- Gap Analysis
- Continued Compliance Support
- Delivery Support
- Task Order Support



# 4. Contextualizing AI

Using the right technology for the job to be done

# How does Generative AI work?



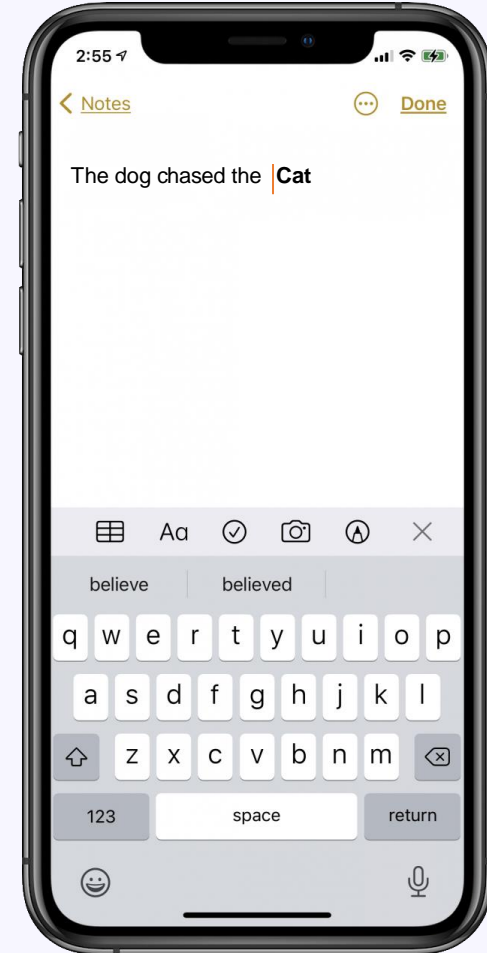
# How does Generative AI work?



Given a block of text, they predict the next word.

“The dog chased the \_\_\_\_\_”

“The dog chased the **cat**”





# How does Generative AI work?



Given a block of text, they predict the next word.

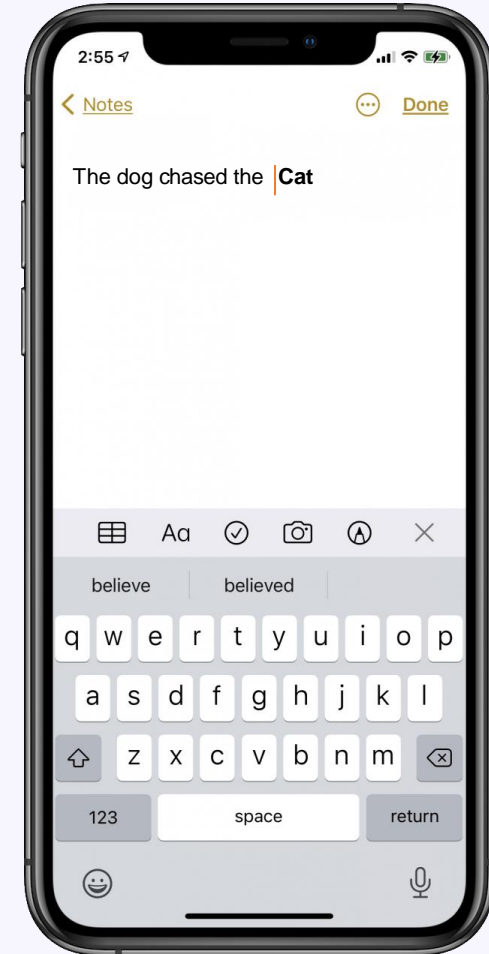
**“The dog chased the \_\_\_\_\_”**

**“The dog chased the **cat**”**

Now the answer could also have been:

**“The dog chased the **car**”**

So, whether it's **cat**, **car**, **bus**, **bee** or **something else** is entirely down to the model's training, plus some other factors.



# How does Generative AI work?



Given a block of text, they predict the next word.

“The dog chased the \_\_\_\_\_”

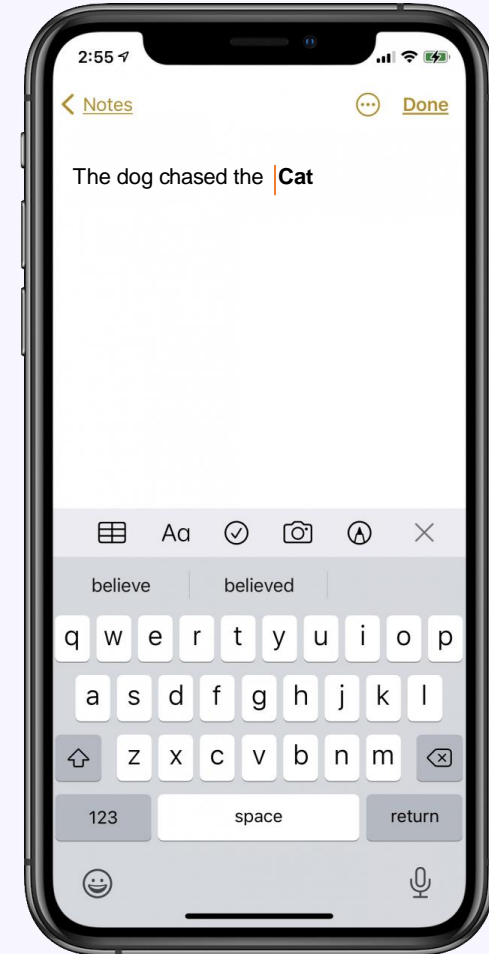
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Now the answer could also have been:

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So, whether it’s **cat**, **car**, **bus**, **bee** or **something else** is entirely down to the model’s training, plus some other factors.

That’s all LLMs do, they predict next words. There is no logic involved. And the next word is dictated by the data held in the model. So far, so good.



# MS Word

A fun example comparing Generative AI vs. Deterministic for a “find” task.

Clipboard Paste Times New Roman 12 27 occurrences Font Paragraph Styles Editing Find Replace Select Adobe Acrobat Create PDF and Share link Create PDF and Share via Outlook Request Signatures Dictate Add-ins Editor Copilot VT Writer Open Grammarly

Navigation

cybersecurity Result 3 of 27

Headings Pages Results

Cybersecurity-Supply Chain Risk Management (C-SCRM) Plan (Attestation Form)

NETWORK SAFETY AND CYBERSECURITY: 73

-Agency collaboration, user mobility, and **Cybersecurity**. Tasks, defined at the task order level,

Service Management, Strategy Generation, **Cybersecurity** Support, Cable Plant Services, and

services: Network Communications, **Cybersecurity** support, Data Center, End-user Services,

Technical Area 8b: ENTERPRISE-WIDE CYBERSECURITY SERVICES

**Cybersecurity** standards, architecture and engineering include assisting in designing and

assisting in designing and developing **cybersecurity** architecture and engineering in order to

in order to improve an Agency's **cybersecurity** posture, take advantage of modern

, and enhance the user experience. **Cybersecurity** and privacy services includes providing

(NIST) risk management framework, and **cybersecurity** posture assessment.

, digital government services, and **cybersecurity** and security systems services. Services

Technical Area 4c: CYBERSECURITY SERVICES

**Cybersecurity** standards, architecture, and engineering include assisting in designing and

**Technical Area 1b: ENTERPRISE-WIDE NETWORK SERVICES**

Manage a single end-to-end service provisioning organization that combines and streamlines LAN and WAN communications services for both corporate and mission networks. The enterprise model is to improve the planning and delivery of enterprise-wide IT services and to obtain cost efficiencies resulting from the consolidated delivery structure. Improve the consistency of infrastructure services built and operated in multiple locations (e.g., LANs and WAN management) to better enable intra-Agency collaboration, user mobility, and **Cybersecurity**. Tasks, defined at the task order level, may include, but are not limited to: Provide continuity of service for legacy custom data network solutions for point-to-point network connections and point-to-point copper and fiber optic circuits; provide Corporate Network Services, Corporate Voice Services, Corporate Data Services, Corporate Collaboration Services, Corporate Management and Operations, Mission Services, Mission Management and Operations, Customer Relationship Management, Service Management, Strategy Generation, **Cybersecurity** Support, Cable Plant Services, and Unified Communications and Collaboration (UCC).

**Technical Area 2b: IT MANAGED SERVICES**

Provide, manage, secure, and maintain IT services across the Agency/Enterprise including but not limited to: End-User Compute Device Management, End-User Software Management, Mobile Device Management, Print Device Management, Messaging/Collaboration, Infrastructure Services, Enterprise Service Desk (ESD), Local Service Desks, End-User Standards, and IT Security. The types of support needed for the End User Services Program could include (but are not limited to) desktop engineering, project management support, transformation and operation support, continual service improvement and communications, and other program support functions.

**Technical Area 3b: ENTERPRISE-WIDE INNOVATION SERVICES**

Enterprise-Wide Innovation Services that include both Innovation efforts of continuous improvement and innovation. Continuous improvement is defined as the ongoing effort to enhance the efficiency and effectiveness of the IT services. Innovation is defined as the process to identify and implement new ideas and break-through solutions that change and/or enhance the services and results in additional Business and/or IT value.

File Home Insert Draw Design Layout References Mailings Review View Help Grammarly Acrobat
Clipboard Font Paragraph Styles Editing Adobe Acrobat Voice Add-ins Editor Copilot VT Writer Grammarly

Navigation cybersecurity Result 3 of 27 Headings Pages Results Cybersecurity-Supply Chain Risk Management (C-SCRM) Plan (Attestation Form) NETWORK SAFETY AND CYBERSECURITY: 73 -Agency collaboration, user mobility, and Cybersecurity. Tasks, defined at the task order level, Service Management, Strategy Generation, Cybersecurity Support, Cable Plant Services, and services: Network Communications, Cybersecurity support, Data Center, End-user Services, Technical Area 8b: ENTERPRISE-WIDE CYBERSECURITY SERVICES Cybersecurity standards, architecture and engineering include assisting in designing and assisting in designing and developing cybersecurity architecture and engineering in order to in order to improve an Agency's cybersecurity posture, take advantage of modern , and enhance the user experience. Cybersecurity and privacy services includes providing (NIST) risk management framework, and cybersecurity posture assessment. , digital government services, and cybersecurity and security systems services. Services Technical Area 4c: CYBERSECURITY SERVICES Cybersecurity standards, architecture, and engineering include assisting in designing and

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Copilot
Create an image
Generate an image of [description]
Ask
How can I more concisely describe [time management?]?
How many occurrences of cybersecurity are in this document?
The term "cybersecurity" appears twice in the document "80TECH24R0001 SEWP VI Final RFP.docx" (1).
Is there anything else you would like to know about this document?
1: search\_in\_current\_document
Copy
AI-generated content may be incorrect
1 Reference
Ask me anything about this document



# When to use Gen AI



# Generative AI vs. Deterministic Models

## Generative AI

### Characteristics:

1. Answers are variable
2. The “truth” depends on the model
3. Results are generated based on predictions (probability)
4. Hallucinations a factor (25% +/-)

## Deterministic Software

### Characteristics:

1. 100% accurate, 100% repeatable
2. Logic, not predictions
3. Results are based on logical steps in code
4. No Hallucinations



## Using Gen AI – The Test

### 3 simple questions

- Do you need 100% accurate results?
- Do you need 100% repeatable results?
- Do you need to know the logic by which you got the results?

**If you answer “Yes”  
to any of these three  
questions, then don’t  
use Gen AI for that task**



# Typical Use Cases & the technology mix



	Task	Note	Gen AI	Other AI (NLP etc.)	Deterministic
Goal 1	Develop a requirements/compliance matrix from a Government-issued Request for Proposal.	Must be 100% accurate		●	●
Goal 2	Assist in developing a compliance driven outline.	Mix: 100% accurate + Good Enough (Gen AI)	●	●	●
Goal 3	Search of database for corporate capabilities / experience, and other search capabilities, as well as traceability to source materials.	Mix: 100% accurate + Good Enough (Gen AI)	●		●
Goal 4	Generate first draft of proposal sections.	Good Enough (Gen AI)	●		
Goal 5	Compliance review of proposal sections.	Mix: 100% accurate + Good Enough (Gen AI)	●		●
Goal 6	Impact analysis on contract changes (Doc Compare / Excel Compare)	Must be 100% accurate		●	●

# Goal 1: Develop a requirements/compliance matrix from a Government-issued Request for Proposal (RFP).



VT Docs 6.0.4 | Folders

Summary Discovery **Dictionary Search** Readability Activity

DRAFT OASIS Plus Unrestricted UR RFP 11-1... Shred to Excel Download Annotated Document Export

Dictionary VT - Contract Terms Review

13 rows removed - Total Rows 534

Categories (6)	Freq	Term(s)	Location	Ref	Body
<input checked="" type="checkbox"/> Will Shall Must (3 Items)	757		nts		
<input checked="" type="checkbox"/> shall	295	shall	General Administration		The Contractor shall ensure the OASIS+ CO has current POC information for both the COPM and COCM. The Contractor must notify the OASIS+ CO of any changes to the contact information for its COCM and COPM within five (5) calendar days of the change in accordance with Section F.4.1, Deliverables.
<input checked="" type="checkbox"/> will	268	will	Requirements		
<input checked="" type="checkbox"/> must	194	must	Requirements		
<input type="checkbox"/> Liability - Damages (6 Items)	23				
<input type="checkbox"/> Warranties (10 Items)	14		General Administration		There are no minimum qualification requirements established for the COPM and COCM. The COPM and COCM are not required to be full-time positions; however, the COPM and COCM must be proficient in the performance of their duties.
<input checked="" type="checkbox"/> Termination - Force Majeure (7 Items)	31		Requirements		
<input checked="" type="checkbox"/> termination	14				
<input checked="" type="checkbox"/> default	6	shall	General Administration		All costs associated with COPM and COCM duties shall be handled in accordance with the Contractor's standard accounting practices; however, no costs for COPM and COCM duties may be billed directly to GSA.
<input checked="" type="checkbox"/> termination for convenience	4		Requirements		
<input checked="" type="checkbox"/> terminated	3				
<input checked="" type="checkbox"/> terminate	2	shall must	Corporate OASIS+ Program Manager		The Contractor's corporate management structure shall guarantee senior, high-level, program management of the OASIS+ Program. The Contractor must appoint a COPM to represent the company in all OASIS+ program-related matters.
<input checked="" type="checkbox"/> breach	2				
<input type="checkbox"/> force majeure					
<input type="checkbox"/> Intellectual Property (10 Items)	54	shall must	Corporate OASIS+ Contract Manager		The Contractor shall appoint...
<input type="checkbox"/> Law and Dispute Resolution (7 Items)	18	will shall must	Contractor Self-Assessment		The purpose of the Contract outlined status u... submit...



**Wrong task to apply Gen AI to.**

# Goal 1: Develop a requirements/compliance matrix from a Government-issued Request for Proposal (RFP).



Category Shred - DRAFT OASIS Plus Unrestricted UR RFP 11-15-2022 Word.docx

File Home Insert Page Layout Formulas Data Review View Automate Help

Clipboard Font Alignment Number Styles Cells Editing Add-ins

S357

VisibleThread Category Shred for "DRAFT OASIS Plus Unrestricted UR RFP 11-15-2022 Word.docx"  
Generated By: fergal2@insure-corp.com using VT - Contract Terms Review on 13 Mar 2024 18:07

Heading	Para No.	Ref	Content	Category	Term	Term Description	Intellectual Property	Law and Dispute Resolution	Damages	Termination - Force Majeure	Warranties	Will Shall Must	Density
PERFORMANCE ST	778	F.4	PERFORMANCE STANDARDS										
PERFORMANCE ST	780		OASIS+ is a performance based contract with measurable standards in terms of quality and timeliness of deliverables and compliances in accordance with Sections F.4.1 and F.4.2.										
PERFORMANCE ST	782		In the event an automated Proposal Management System is not operational, deliverable and reporting requirements designated for input into the system shall be provided as directed by the OASIS+ UR Contracting Officer (CO) within the stated timeframes. The OASIS+ SB CO or an authorized representative shall have the right to examine and audit all supporting records and materials, regardless of whether such items are in written form, in the form of computer data, or in any other form for the purpose of enforcing all deliverables and compliances herein.	Will Shall Must Intellectual Property	shall right*	right* :: Matches: rightAA,	x					x	3
PERFORMANCE ST	784		All business systems and certifications are optional; however, Contractors are encouraged to acquire these systems and certifications because OCOs may require them at the task order level.										
PERFORMANCE ST	786		Failure to meet the following deliverables, reports, or compliance standards may result in the activation of Dormant Status and/or result in a Contractor being off-ramped (See Sections H.12 and H.13).										
PERFORMANCE ST	788	F.4.1	Deliverable and Reporting Requirements										
PERFORMANCE ST	790		The following table contains deliverables and reports required for OASIS+. Task order deliverables and reporting requirements will be specified in the task order. The Government does not waive its right to add reporting requirements, performance standards, or other deliverables or reports not specifically listed in the table below by modification at no additional expense to the Government. Deliverables or reporting requirements are required until the final task order is closed-out for each contractor. If a deliverable or reporting requirement is due on a calendar day that falls on a weekend day or a Government holiday, the deliverable or report is due the following business day.	Will Shall Must Intellectual Property	will right*	right* :: Matches: rightAA,	x					x	2
PERFORMANCE ST	793 - 797	SECTION	SECTION	REFERENCE	DESCRIPTION	FREQUENCY	LOCATION						
PERFORMANCE ST	798 - 805	G.3.1.1	G.3.1.1	Contractor Key Points of Contact (POC)	Revisions of Corporate OASIS+ Program Manager (COPM) or Corporate OASIS+ Contract Manager (COCM) POC	Within five (5) calendar days of the substitution. Provide new POC information.	OASIS+ UR  CO via OSP as well as notify via OASIS+mods@gsa.gov						
PERFORMANCE ST	806 - 812	G.3.1.2	G.3.1.2	Contractor Self-Assessment (CSA)	Document deliverable and reporting	Annually during the performance period	OASIS+ UR						
												Will Shall Must	shall

DRAFT OASIS Plus Unrestricted U Export Settings +

Wrong task to apply Gen AI to.

# Goal 4: Generate first draft of proposal sections.



VT Writer 4.1.0

You are on the Teams plan | fergal.mcGovern@visiblethread.com

Creator Mode | Scoring Mode

Normal | 12 px

B I

Actions

Hi, I'm Visi

Let's get started

- Create a 1st draft Comms plan for a new product
- Create a style guide

Proposal Teams [Show more](#)

- Create a draft RFI Response
- Rewrite this to be below a word count of [X]
- Proposal Theme

Edit & Utility Functions [Show more](#)

- Simplify a selection of text
- Proofread this selection
- Make this selection into a list

Healthcare

- Proposal Executive Summary
- Provider Enrollment Letter

Create an RFI response. It is for a government agency called [agency name](#). The RFI is called [RFI name](#). Include a cover letter, and table of contents. The project is to [specify purpose of RFI](#). Include an overview of the project or challenge. Include introductory information about our organization and why we're qualified. Outline

399/4000

Save & Analyze | Clear All



Right task to apply Gen AI to.

# Goal 4: Generate first draft of proposal sections.



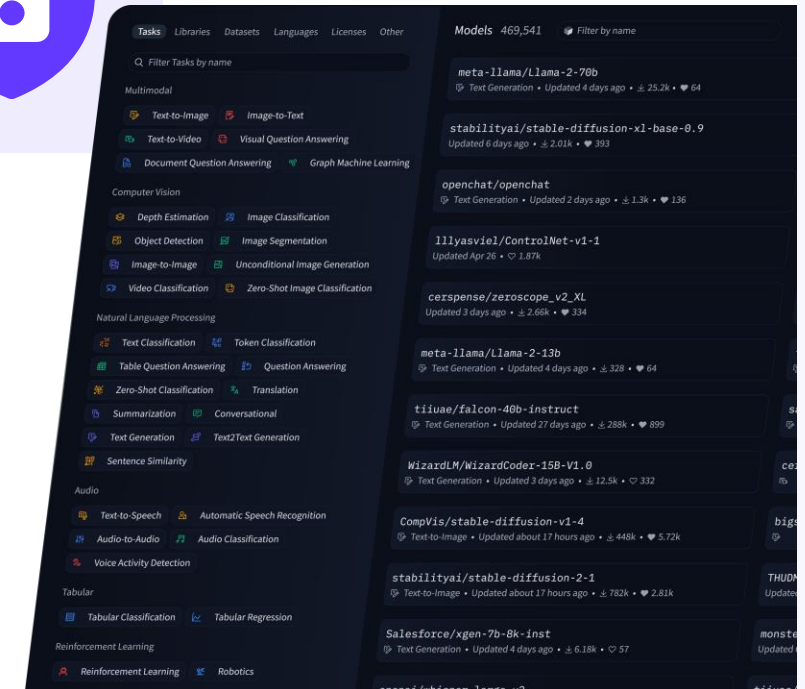
The screenshot displays the VT Writer interface. At the top, the header shows 'VT Writer 4.1.0', 'You are on the Teams plan', and the user 'fergal.mcGovern@visiblethread.com'. The interface is split into a chat area on the left and a document editor on the right. The chat area shows a prompt: 'You wrote: Create an RFI response. It is for a government agency called the CDC. The RFI is called AI Automation Include a cover letter, and table of contents. The project is to optimize the procurement cycle. Include an overview of the project or challenge. Include introductory information about our organization and why we're qualified. Outline the general terms of the project and what outcomes we'll achieve.' Below this, a 'Visi' AI assistant has generated a draft RFI response. The draft includes a cover letter, company information for the CDC, a salutation, an introductory paragraph, a paragraph about AI automation, a table of contents, and an executive summary. The document editor on the right shows the same draft with a green callout box overlaid on the right side that says 'Right task to apply Gen AI to.' The bottom of the interface has a 'Save & Analyze' button and a 'Clear All' button.

Right task to apply Gen AI to.

# Enterprise Considerations Security



- For proprietary, sensitive or CUI content, avoid public-cloud based LLMs
- Since Nov 2022...rapid evolution currently 1,072,427 models (as of Oct 25th, 2024)
- VisibleThread supports a private LLM (Mistral NeMo) OR can use your LLM. We are LLM - agnostic
- Zero external connectivity, 100% behind your firewall, zero data risk





# 5. Our Vision

# Our Priorities: Choosing the Right Technology



## Manual Data Analysis:

Many GovCon teams still use traditional methods like "Control + F", copy/paste, Adobe Compare and reviewing everything by hand. Time-consuming and prone to errors.

**100% Accurate**

## AI-Powered Content Creation:

AI tools are increasingly used for proposal writing and compliance matrices, reducing repetitive tasks and freeing up time for strategic work.

**100% Secure**

## Document Management Automation:

Modern solutions focus on automating workflows, ensuring version control, and meeting compliance requirements to improve document accessibility and organization.

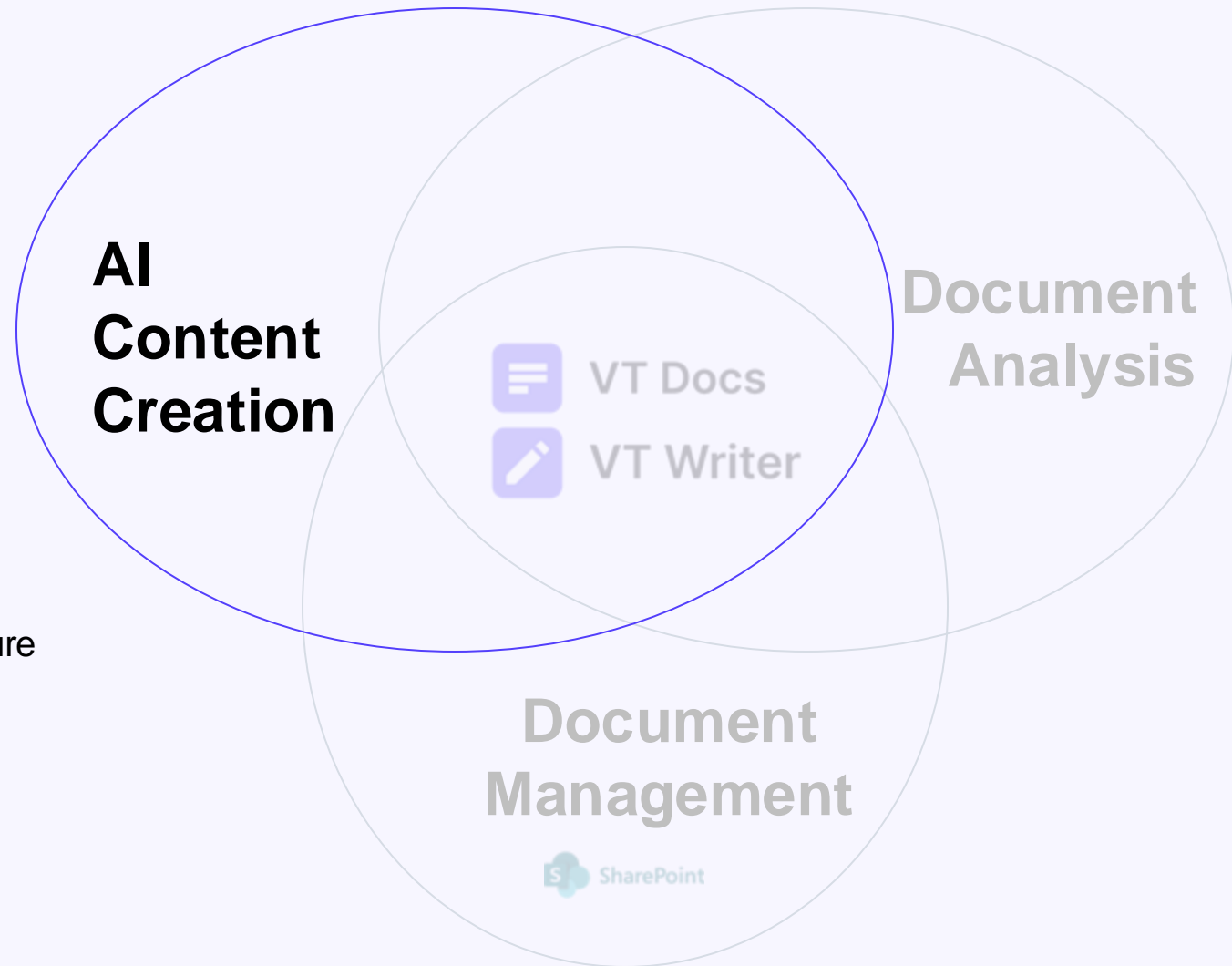
**100% Integrated**

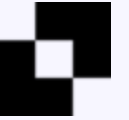




# Market Category

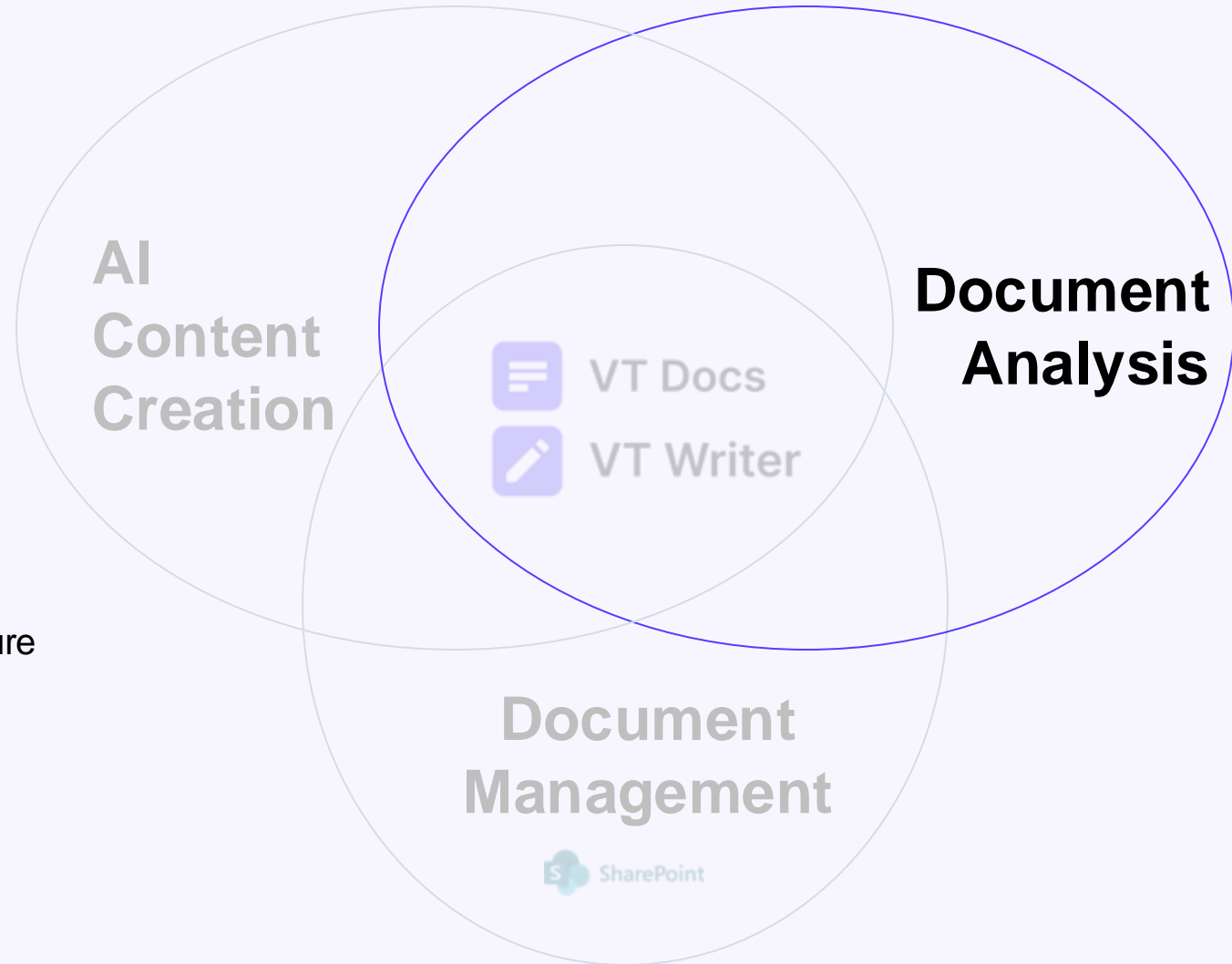
Designed for regulated industries – 100% secure

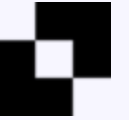




# Market Category

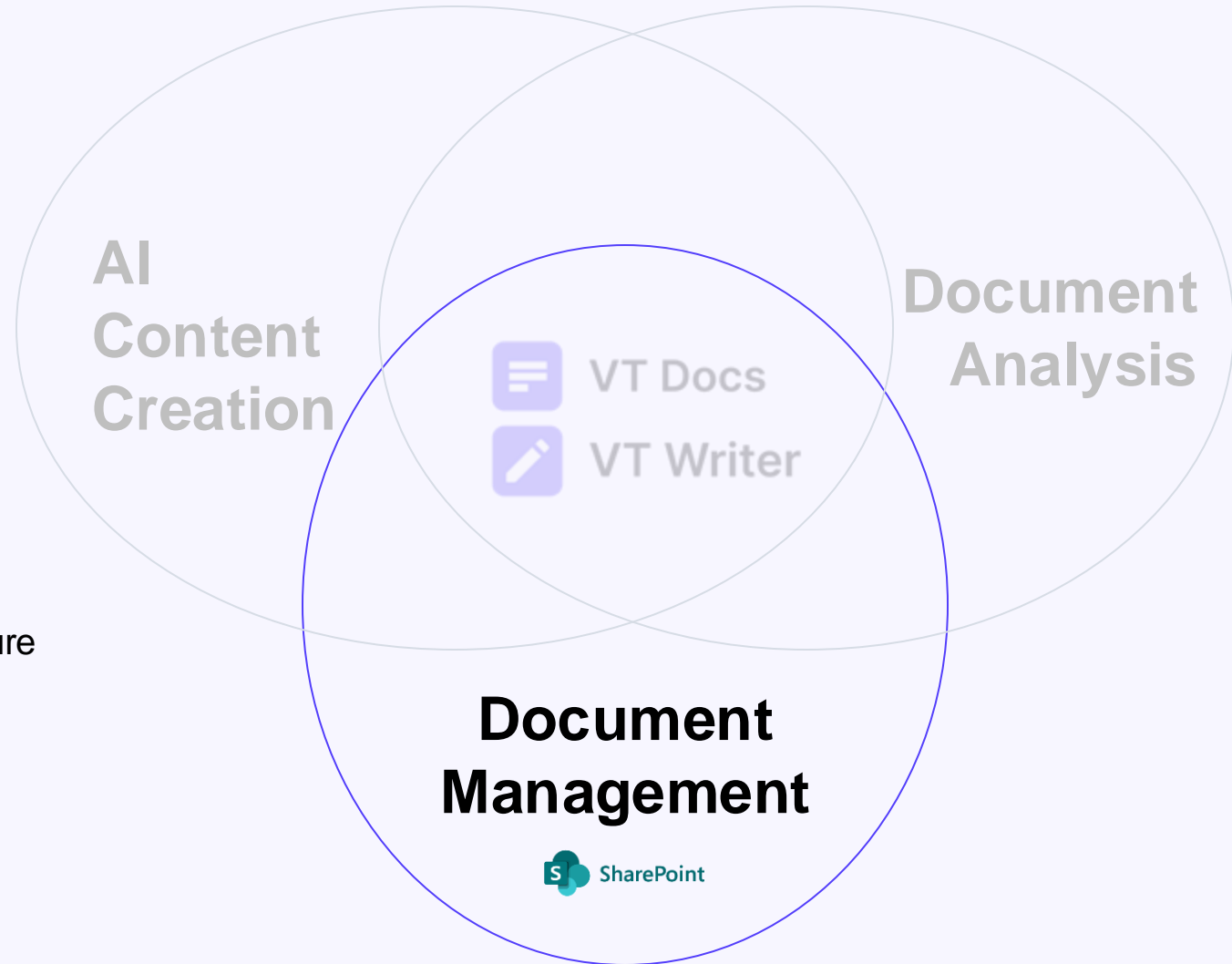
Designed for regulated industries – 100% secure





# Market Category

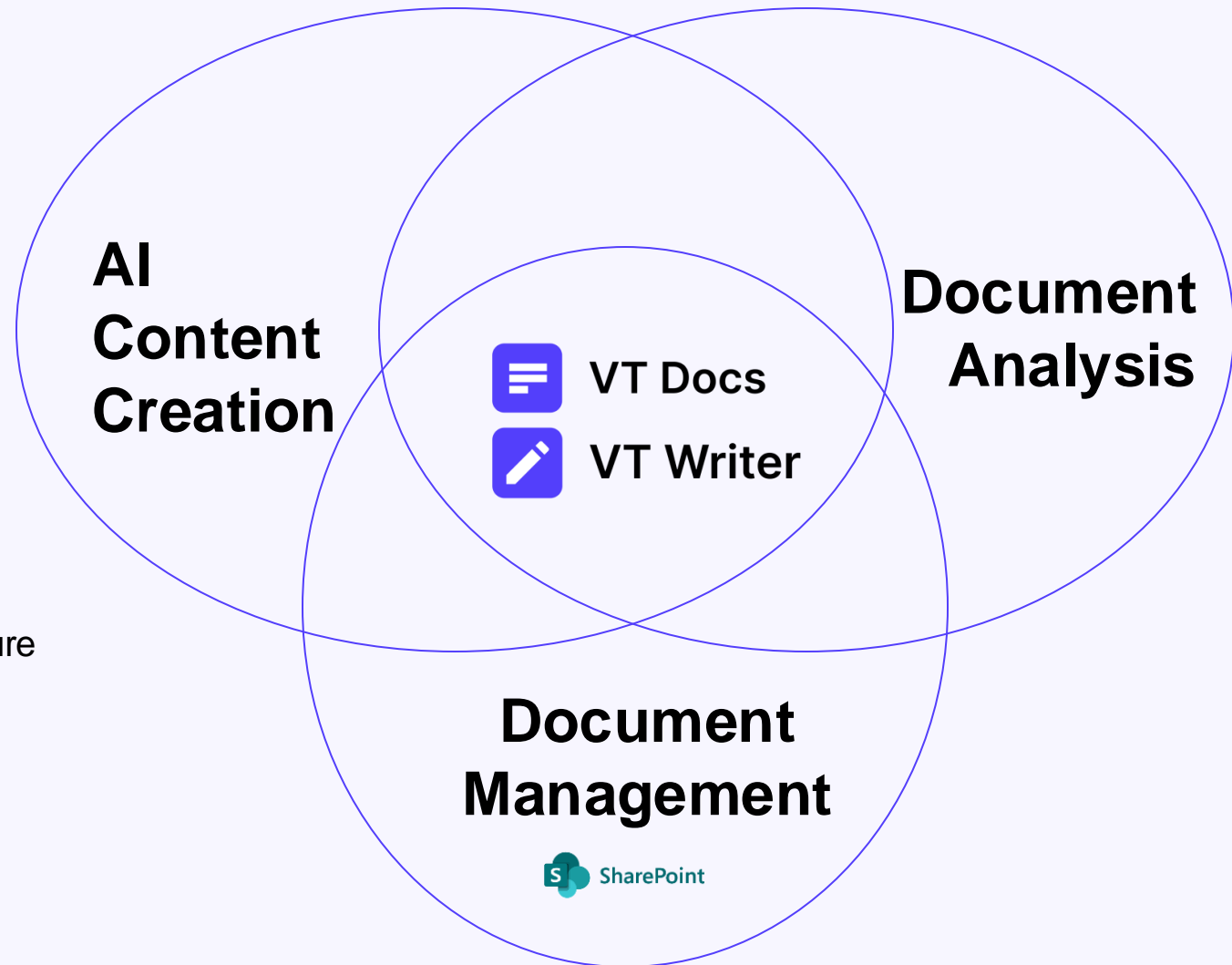
Designed for regulated industries – 100% secure





# Market Category

Designed for regulated industries – 100% secure





Coming Soon to VT Writer

Using your SharePoint Proprietary Data

# Hooking in SharePoint Files (I) – Using a Reference File

The screenshot displays the VT Writer application interface. At the top, the header shows 'VT Writer' on the left, 'You are on the Unlimited plan' in the center, and a user profile 'peter@xyzinc.com' on the right. Below the header, the document title 'Statement of Work (SOW).PDF' is visible, along with 'Page 1 of 10' and a zoom level of '125%'. The main document content is titled 'NCS Internet Path Project Support Statement of Work (SOW)' and includes sections for 'Introduction', 'Background', and 'Scope'. A blue highlight is present in the 'Background' section. On the right side, there is a sidebar with a 'Hi, I'm Visi' header and several AI-powered prompts categorized by team: 'Marketing & Comms Teams', 'For Proposal Teams', 'For Finance Teams', and 'For Sales Teams'. The 'For Sales Teams' section is currently active, showing a prompt to 'Generate a response for this:' followed by a snippet of text from the document. At the bottom of the sidebar, there are icons for different AI models, with 'Standard AI' selected.

**VT Writer** | You are on the **Unlimited plan** | peter@xyzinc.com

Statement of Work (SOW).PDF | Page 1 of 10 | 125%

### NCS Internet Path Project Support Statement of Work (SOW)

#### 1 Introduction

The purpose of this SOW is to obtain analytic data and tools – using either Government off-the-shelf (GOTS) or commercial off-the-shelf (COTS) products – that will improve the National Communications System's (NCS) understanding of Internet assets and their influence on the survivability of NS/EP and Federal agency communications.

#### 2 Background

Executive Order 12472 assigns the NCS responsibility for ensuring that a national security and emergency preparedness (NS/EP) telecommunications infrastructure exists and is responsive to the needs of the President and the Federal departments and agencies.

Before the explosive growth of the Internet over the past decade, NS/EP communications relied heavily on the public switched telephone network (PSTN). At that time, efforts focused on understanding the infrastructure and developing the capability to perform modeling and analysis tasks with varying degrees of fidelity and from multiple vantage points. As increasing numbers of Government users began using services offered through the Internet, its logical and physical infrastructure also became an integral part of NS/EP and CIS (Critical Infrastructure Sector) communications. Therefore, identifying the infrastructure and assets of the organizations that compose the entire public switched network (PSN), including the Internet, has become vital to preserving the continuity of NS/EP and CIS communications.

#### 3 Scope

The primary objective of this order is to provide the NCS with data and analytic tools to enhance Government understanding of the dependencies between specified organizations and their Internet service providers (ISP) and improve the capability of the NCS to provide situational awareness reporting for Emergency Support Function-2 (ESF-2) and other customers. Tool implementation will conform to DHS MD 4300.1, as implemented by DHS MD 4300A and/or 4300B Policies and Handbooks. Copies of the aforementioned Management Directives will be provided to the contractor upon request.

This SOW reflects current DHS/NCS policies and practices, allowing offeror to propose and price a solution to known requirements. Funds are not available to support product development; therefore, the Contractor shall provide a COTS or GOTS product. During the base year, the Contractor will provide software, data subscription, and routing analytics via web portal access; in the out years, the Contractor will enable the integration of on-site Government data with the data provided by the Contractor. Any required integration support will be covered under task 4.4 (Maintenance/Assistance) in the statement of work.

### Hi, I'm Visi

Let's get started

#### Marketing & Comms Teams

- Create a style guide
- Create a logo usage guide
- Create an informational blog post about [XYZ]

#### For Proposal Teams

- Create a draft RFI Response
- Rewrite this to be below a word count of [X]:
- Create an Outline

#### Edit

- Simplify a selection of text
- Proofread this selection
- Make this selection into a list

#### For Finance Teams

- Create an invoice processing & approval workflow
- Create a vendor setup & maintenance process
- Create a payment scheduling & disbursement process

#### For Sales Teams

- Summarize this call summary into next steps
- Generate a response for this:
  - Executive Order 12472 assigns the NCS responsibility for ensuring that a national security and emergency prepar...

Standard AI

# Hooking in SharePoint Files (II) – Choosing SharePoint Files to Use

The screenshot shows the VT Writer application interface. The document being edited is titled "Statement of Work (SOW).PDF" and is in "Creator Mode". The document content includes sections for "Introduction", "Background", and "Scope". A "Choose Files" dialog box is open in the foreground, displaying a file selection interface. The dialog shows a list of files from a SharePoint site, with two files selected: "RFP 8004926 - DFW" and "RFP 7373727 - FMG".

**Choose Files Dialog Details:**

- Location: Sites > VT Marketing
- Search: 16 Oct, 2024 12:20
- Table:

Name	Indexed	Source	Owner	
RFP 8004926 - DFW	✓	SharePoint	Fergal McGovern	Remove
RFP 7373727 - FMG	●	SharePoint	Fergal McGovern	Remove

Below the table, the selected files are listed again with green checkmarks:

- RFP 8004926 - DFW ✓
- RFP 7373727 - FMG ✓

Buttons: + Add to Collection, Continue, Cancel

# Hooking in SharePoint Files (III) – Results with SharePoint Sources

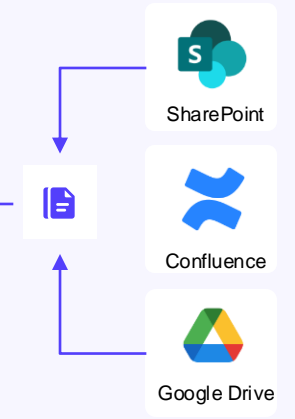
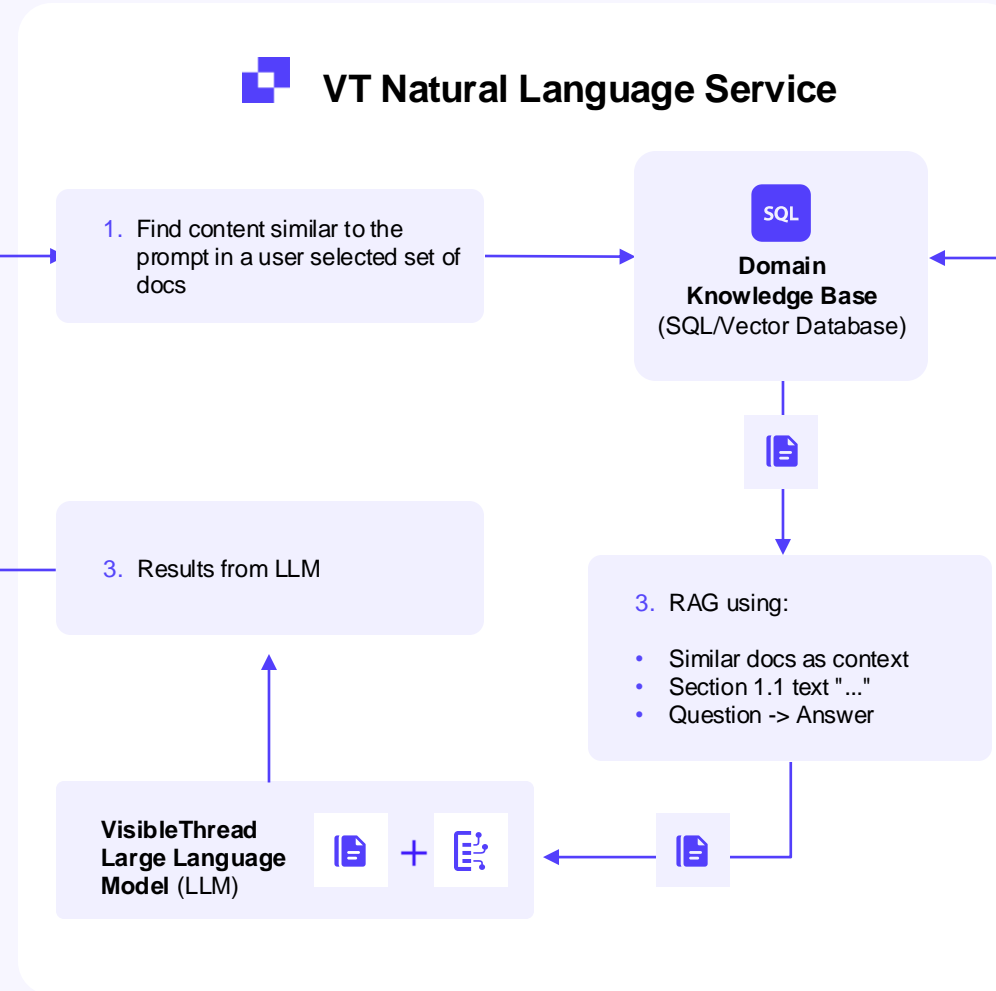
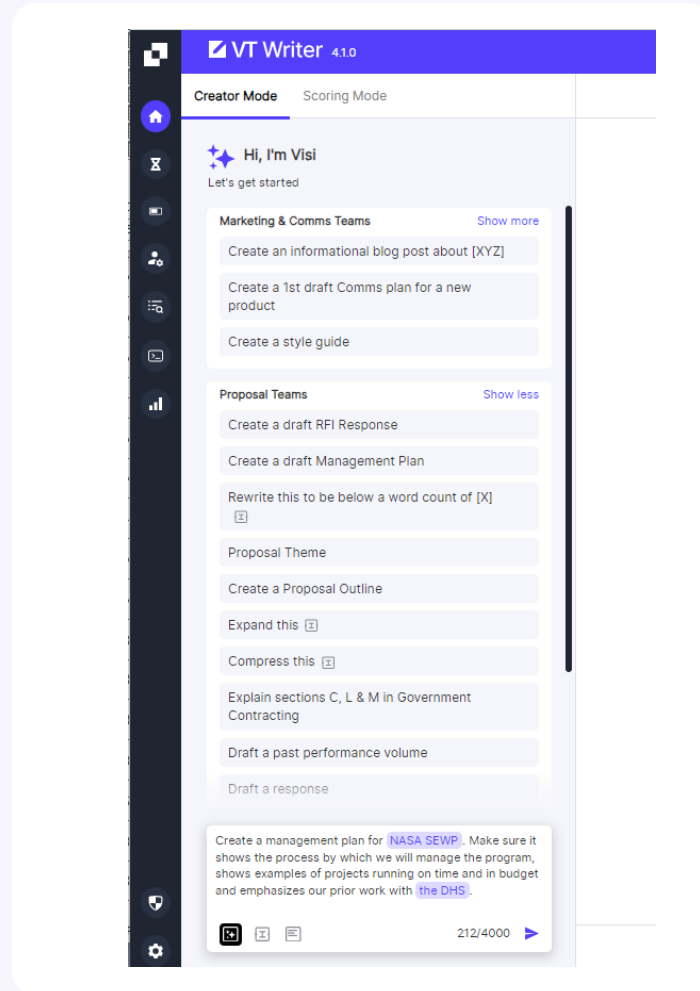
The screenshot displays the VT Writer application interface. At the top, the header shows 'VT Writer' on the left, 'You are on the Unlimited plan' in the center, and a user profile 'peter@xyzinc.com' on the right. Below the header, the document 'Statement of Work (SOW).PDF' is open, showing page 1 of 10. The document content includes a title 'NCS Internet Path Project Support Statement of Work (SOW)' and sections for '1 Introduction', '2 Background', and '3 Scope'. A blue highlight is visible in the 'Background' section. To the right of the document is a chat window titled 'You Wrote' with a 'Clear Chat' button. The chat content includes a prompt to generate a response for a specific text snippet, followed by a 'Based on' section listing a 'Collection' of 'Fergals RFP Collection (11 files)'. Below this is a 'Visi' section with an 'Inserted' label, containing a structured list of information: 'NASA SEWP Management Plan' with a sub-section '1. Program Overview' and a sub-section '2. Program Management Process' with three bullet points. At the bottom of the chat is a 'Sources' section with a table of three items:

Source	Type
1 CIO-SP4 Draft RFP	Contract
2 Alliant+3+GWAC-Draft+ Re..	RFP
3 JETS 2.0 - AFP - SP4709-23...	RFP

At the bottom of the interface, there is a 'Use selected text' button and a search bar labeled 'Ask Visi Anything' with a search icon.



# Under the covers: LLMs + RAG (Retrieval Augmented Generation)



# Together, We Can Shape The Future.



VisibleThread

# SUMMIT 24

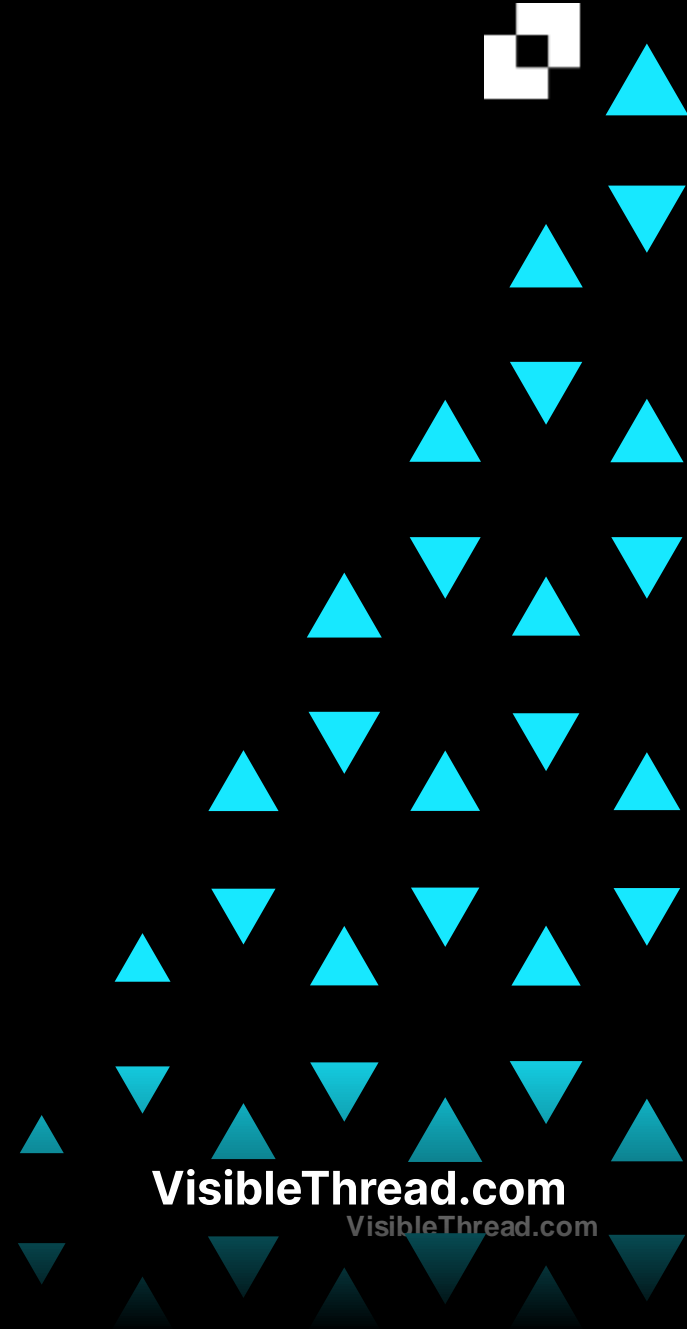
THE RFP SOFTWARE CONFERENCE

## Q&A

RFP Software for Government Contracting

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

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





## Next Session

# Bid and Proposal Trends, Best Practices and Automation

Steve Skeldon  
Chickasaw Nation Industries

Anatalia Macik  
Excella

Kyle Peterson  
VisibleThread



Next Session

# Leveraging Data for Contract Vehicle Analysis



Kyle Peterson  
Vice President of Customer Success



Allison Ritz  
Director of Product Marketing

# Agenda



01. Discovery Overview

---

02. Opportunity Overview

---

03. Pre-RFP Use Cases

---

04. Post-RFP Use Cases

03. Demo



# Discovery Overview

# How is Discovery Used?



## Discovery Use Cases

- **Document Analysis**
- **Gap Analysis**
- **Thematic Assessment of Documents**
- **Identification of Customer Language**
- **Support for Data Calls**
- **Past Performance Assessment**
- **Contract Support**
- **Resume Review**
- **Win Theme Analysis**
- **Teaming Partner Analysis**



# Ability to search/filter

# Frequency Heat Map

# Export Results/Reports



VT Docs 6.11 | Folders | alison.ritz@visiblethrea

Summary | **Discovery** | Dictionary Search | Readability | Activity

MSD IDIQ

Type to filter

Show All: All Selected

Themes (1,905)

Theme	Count	DRAFT+RFP_MSD+IDIQ_16+August (1).pdf	DRAFT+PWS_MSD+IDIQ_16+August (1).pdf	MSD DRAFT+RFP_MSD+IDIQ_16+August (1).pdf	MSD DRAFT+PWS_MSD+IDIQ_16+August (1).pdf	MSD+IDIQ+DRAFT+PWS_MSD+IDIQ_16+August (1).pdf
Government	866	202	87	202	87	21
contract	712	180	85	180	85	11
Contractor	710	108	143	110	144	8
Offeror	606	202		202		20
performance	418	96	39	96	39	11
performance	140	26	22	24	23	2
Performance Work Stateme...	45	13		15	2	1
unsuccessful performance	36	14		12		1
contract performance	19	6	1	5	1	
performance metrics	15	4		4		
unsuccessful contract perf...	14	2		8		
performance or capability r...	12	4		4		
Contractor's performance	9		3		3	
Expedited Delivery/Enhanc...	6	2		2		

Detail

36 rows removed - Total Rows 9

Document	Items	Location	Ref	Content
DRAFT+RFP_MSD+IDIQ_16+August (1).pdf	performance met...	Page 3		The contractor shall perform in accordar Performance Work Statement in Section This FFP CLIN is associated with individ Increment (PI) and is payable to the con completion of a PI. The contractor shall i the "Very Good" performance standard(: <b>performance metrics</b> selected for the as Government reserves the right to unilate FFP CLIN and de-obligate all funding un the contractor does not meet all <b>perform</b> The Contractor shall not be entitled to p metrics do not meet the minimum threst Good".
DRAFT+RFP_MSD+IDIQ_16+August (1).pdf	performance met...	Page 5		The contractor shall perform in accordar Performance Work Statement in Section This FFP CLIN is associated with individ Increment (PI) and is payable to the con completion of a PI. The contractor shall i the "Very Good" performance standard(: <b>performance metrics</b> selected for the as Government reserves the right to unilate FFP CLIN and de-obligate all funding un the contractor does not meet all <b>perform</b> The Contractor shall not be entitled to p metrics do not meet

# Document Themes

# Source Document Content



# Opportunity Overview

# Opportunity Overview - MAPS



## What We Know Now

In 2027, the Army will merge the Responsive Strategic Sourcing for Services (RS3) and Information Technology Enterprise Solutions 3- Services (ITES-3S) contracts into a single follow-on contract vehicle.

The new consolidated contract will be named the Marketplace for the Acquisition of Professional Services (MAPS), previously intended to be called the Army Contracting Command's Enterprise for Sourcing Services (ACCESS). MAPS is set to become the Army's primary contract for both IT and professional services.



# Opportunity Overview - MAPS



## Why Merge?

- **Reduction of Redundancies**
  - Eliminate overlapping functions
  - Reduce duplication of effort
- **Alignment with Digital Transformation**
  - Support ongoing digital transformation efforts through flexible and adaptive framework
- **Cost and Time Savings**
  - Quicker more cost-effective acquisitions
- **Simplified Vendor Engagement**
  - Reach target market more directly while participating in fewer contracts



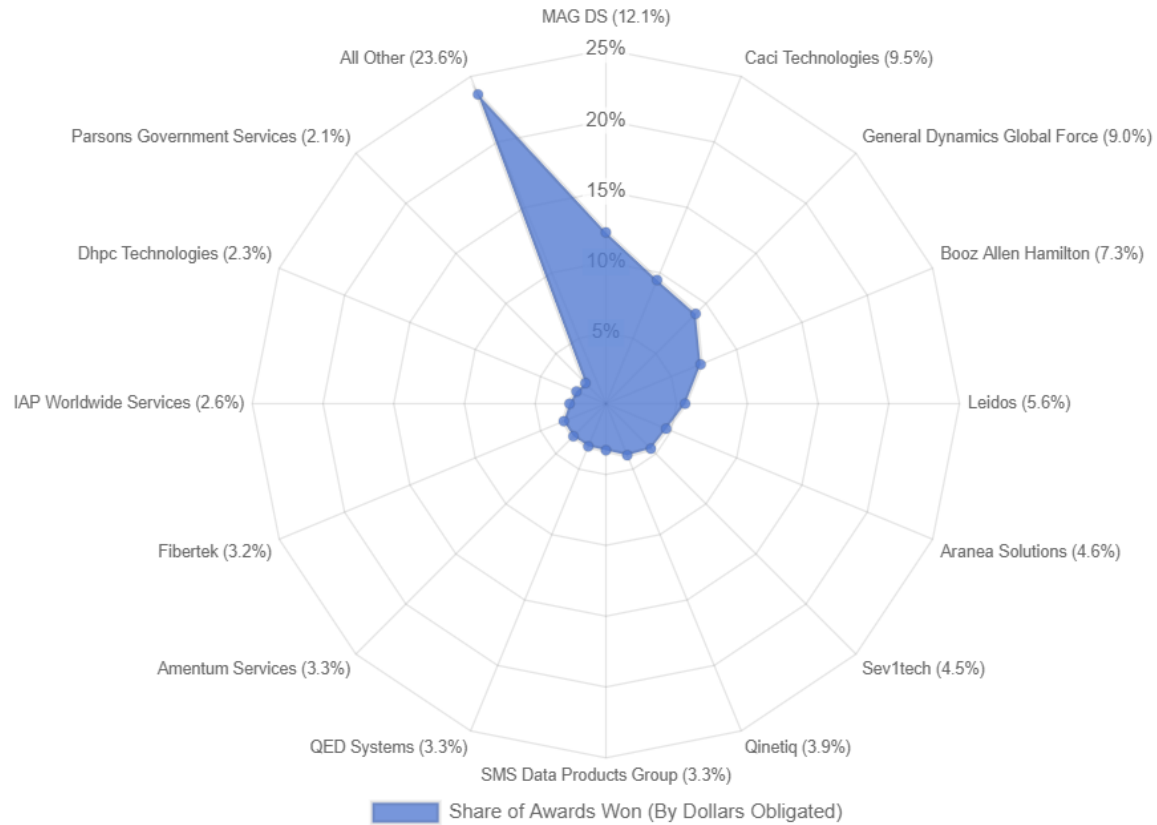
# MAPS by the Numbers

## Current Vehicle Status

- **RS3**
  - POP – 05/15/2017 - 05/14/2027
  - Current combined potential value
    - Exercised options - \$10.7B
    - Unexercised options - \$9.5B
    - 261 Awardees
      - 535 Contracts
      - 2.1K Subcontracts
  
- **ITES - 3S**
  - POP – 09/25/2018 - 09/24/2024
  - Current combined potential value
    - Exercised options - \$3.7B
    - Unexercised options - \$2.4B
    - 135 Awardees
      - 713 Contracts
      - 667 Subcontracts



# RS3



# ITES-3S





# Leveraging VisibleThread

## How can VisibleThread be leveraged during the pre-RFP stage?

- **Deconstruction of the Previous Vehicles to confirm win themes and requirements**
  - Leveraging Discovery
  - Creating custom dictionaries from solicitation documents
  - Planning for likely requirements
  - Identifying differentiators
- **Analyzing Past Performance**
  - Previous Awards
  - Differentiators on specific types of work
  - Where can we be most competitive?

# Leveraging VisibleThread



## How can VisibleThread be leveraged during the pre-RFP stage?

- **What do the awards tell us?**
  - Who has been awarded the most work?
  - What trends have emerged?
  - What could this mean for the new vehicle?
- **Beyond Discovery**
  - Gen AI Competitive Assessment with Visi
  - Using prompts to identify differentiators in product/service offerings
  - Differentiators between key competitors
  - Identifying value props and strengths





# Leveraging VisibleThread

## How can VisibleThread be leveraged during the post-RFP stage?

### Deconstruction of the solicitation and competitor responses

- Leveraging Discovery
- Gap analysis
- Competitor win themes
- Scoring vs. overall proposal focus
- Identifying differentiators

### What do the awards tell us?

- Which proposal was scored the highest
- What are the themes?
- Where are the gaps in solicitation and how is that reflected in awards and scoring?

# Opportunity Overview



Through the Texas Healthcare Transformation and Quality Improvement Program 1115 Demonstration Project, STAR Kids serves children and young adults under the age of 21 who receive Supplemental Security Income (SSI) and SSI-related Medicaid or who participate in a 1915(c) Waiver. The Managed Care Organization (MCO) will deliver services authorized under the Medically Dependent Children Program (MDCP)

- 116B Program Value
- Multiple service areas with multiple awards
- Contractors can be awarded across multiple service areas
- Scoring rubric weighed to award those focusing on person-centered care, ease of access, integrated technology, etc.



# VA CardinalCare



VT Docs 6.11 | Folders kyle.peterson@visibl

Summary **Discovery** Dictionary Search Readability Activity

VA CardinalCare RFP Win Themes - Differentia... | Snapshots (1) | Shred to Excel

Type to filter

Show All  All  Selected

Themes (16) <span>⋮</span>	Freq	Reference_Card...	Reference_Card...	RFP_13330_CC...	Appendix_A-Ca...	RFP_13330_CC...
Care	544	678	814	638	2,684	20
<input checked="" type="checkbox"/> Care Technical Manual	304	130	172	2		
<input checked="" type="checkbox"/> Care Management	90	4	4	4	78	
<input checked="" type="checkbox"/> foster care	47	8	8	12	19	
<input checked="" type="checkbox"/> Foster Care Specialty Plan	22			15	3	4
<input checked="" type="checkbox"/> Hospital 001 Acute Care	18		18			
<input checked="" type="checkbox"/> Care Experience	11			9	1	1
<input checked="" type="checkbox"/> Care Program	10	1	1	3	5	
<input checked="" type="checkbox"/> Care Enrollment	8	2	2	1	3	
<input checked="" type="checkbox"/> All-Inclusive Care	7		1		6	
<input checked="" type="checkbox"/> Person-Centered Individual...	7				7	
<input checked="" type="checkbox"/> prenatal care	5	1	1		3	
<input checked="" type="checkbox"/> Ambulatory Care	4	1	3			
<input checked="" type="checkbox"/> Care Incident	4	1	1		2	

**Detail** Ignore

734 new rows added - Total Rows 734

Document	Items	Location	Ref	Content
Reference_Cardinal_Managed_Care_Technical_Manual_v0.8_20221020_1.pdf	Care Technical M...	Page 1		Managed <b>Care Technical M</b>
Reference_Cardinal_Managed_Care_Technical_Manual_v0.8_20221020_1.pdf	Disenrollment	Page 7	2.7.62	2.7.62 Member Enrollment, Educational Materials 244
Reference_Cardinal_Managed_Care_Technical_Manual_v0.8_20221020_1.pdf	Care Enrollment	Page 8	3.2.1	3.2.1 Managed <b>Care Enrolli</b>
Reference_Cardinal_Managed_Care_Technical_Manual_v0.8_20221020_1.pdf	Care Technical M...	Page 11	0.0	0.0 Multiple Draft Cardinal <b>Manual</b> Created 03/15/202
Reference_Cardinal_Managed_Care_Technical_Manual_v0.8_20221020_1.pdf	Care program	Page 15		This manual provides deta all contractual deliverables



# Live Demo



# Q&A



**Want more information on  
leveraging VT for analysis?  
Customer Success is here!**

 **VisibleThread**

# Networking and Lunch



Please take a moment and review us on Capterra!

VT Docs



VT Writer







Next Session

# Customer Case Study Trust Income Equity

Corey Solivan  
Trust Income Equity

Derick Catman  
Trust Income Equity

# Revolutionizing Federal Business Acquisition

Welcome to a transformative journey in federal contracting. I'm Corey Solivan from Trust Income Equity, here to share our groundbreaking approach to the Business Acquisition Process (BAP).

We'll explore how we've leveraged data and visualization tools to overcome challenges and drive value. Let's rethink 'this is the way', together.

 by **Corey Solivan**



**Corey Solivan**

Founder, Trust Income Equity LLC & Data Room AI | Tech Advisor | Talks about #c...



# Reimagining the Business Acquisition Process

- 1** — Traditional Approach  
Conventional BAP often leads to inefficiencies and missed opportunities in federal contracting.
- 2** — Innovative Thinking  
Trust Income Equity's reimagined BAP focuses on agility and data-driven decision-making.
- 3** — Tool Integration  
We've adopted cutting-edge tools and methodologies to streamline our process.





# Harnessing Concept Dictionaries for Decision-Making Logic

## Foundation

Concept dictionaries serve as the bedrock for our data analysis approach: Category > Term > Description enable drastic reduction in repeat research, reading, and reviewing tasks.

## Hit Density

We use hit density to assess document relevance and streamline information processing: # of Unique Terms, Qty of Term Hits, and % a Category Makes up Hits.

## Tagging

Document tagging organizes information efficiently, enables extraction with structure, and enhancing our analytical capabilities.

## Outcomes

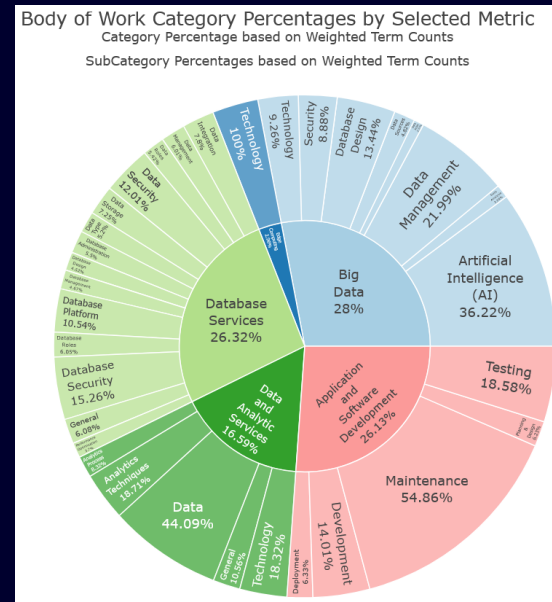
This approach has improved our accuracy and reduced our time in evaluating opportunities and processing data.



# Visualizing the Body of Work

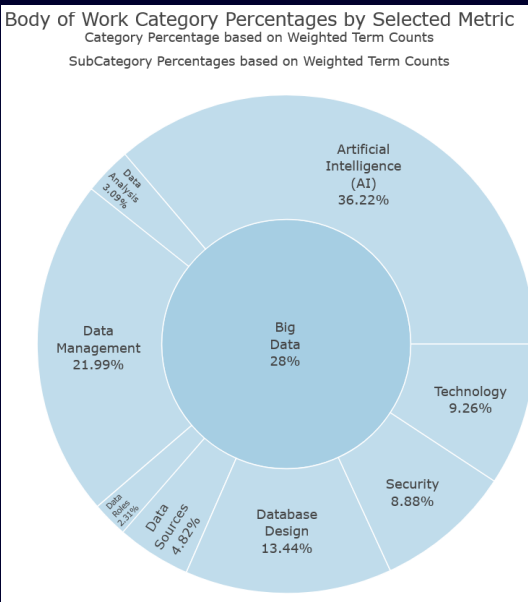
## Body of Work (BOW)

BOW encompasses a company's total past performance and capabilities in federal contracting.



## 'Left Grid' Export

VisibleThread's 'Left Grid' feature allows us to export 'raw' term(s) hit-data for visual analytics.

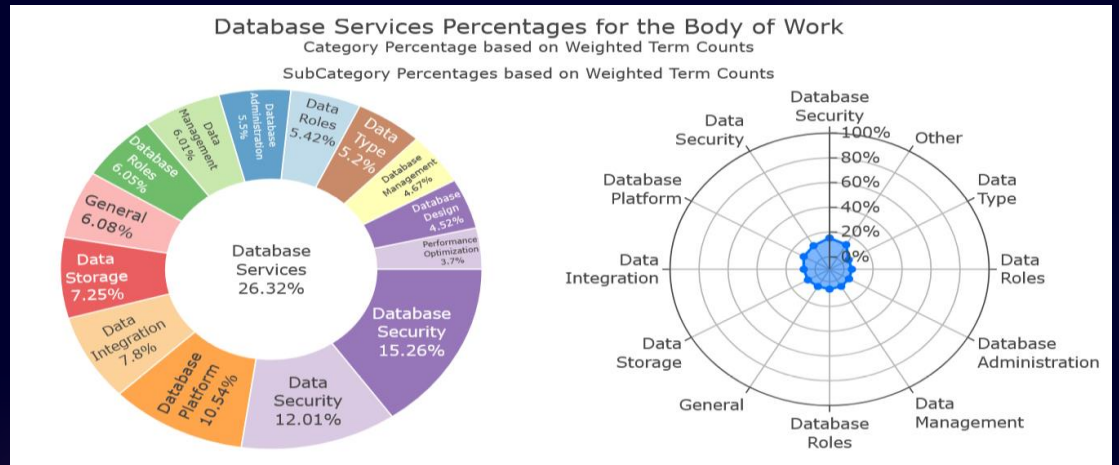


## Strategic Insights

These visualizations inform our strategic decisions and highlight our strengths or gaps.

Project	Weighted Score Sum	Times Ranked	Values = Selected Metric Count					Utilization Potential
			Big Data	Edge Computing	Database Services	Data and Analytic Services	Application and Software Development	
Contract.53-	373	4	11		119	10	24	Primary
Contract.46-	326	3	46		86	12		Secondary
Contract.43-	312	3	47		74	16		Primary
Contract.49-	283	2			126		48	Primary
Contract.51-	246	3	23			7	36	Secondary
Contract.55-	233	2		4			18	Primary
Contract.60-	200	2				40	28	Secondary
Contract.52-	199	3	14		65		11	Secondary
Contract.31-	161	2	23				24	Primary
Contract.28-	144	2	6			8		Primary
Contract.45-	143	2	8			4		Secondary
Contract.3-	95	1			41			Secondary

	Weighted Score Sum	Times Ranked	Values = Keyword Count										Utilization Potential
			TA01c	TA02c	TA03c	TA04c	TA05c	TA06c	TA07c	TA08c	TA09c	TA10c	
PWS.48	390	10	28	38	126	247	105	17	329	414	135	51	Primary
PWS.52	178	8	8	17	27	36	8		44		17	9	Secondary
PWS.16	167	7	5	6	17	47	9			31	54		Secondary
PWS.13	140	7			6	51	21		28	39	13	19	Primary
PWS.3	135	5	29	41		37		3			20		Secondary
PWS.4	126	4	12	50				3			25		Secondary
PWS.56	122	4	10		12		39			60			Primary



# Automating Capability Comparison

- 1
- 2
- 3

## Common Dictionary

We implemented a standardized dictionary to facilitate accurate capability comparisons. Our concept dictionaries leverage the Category for 'work type', the Term for 2-3 word concepts, and the Description for building ties to Requirements & Evaluation Factors.

## Alignment Process

Our system aligns opportunity documents with our BOW using the common dictionary. This is like an automated 'human reviewer' of all documents for a specific set of topics.

## Automated Analysis

The automated comparison process significantly improves efficiency, accuracy, and completeness. It enables all possible data sources to be 'batched' into folder for evaluation, analysis, and relevant information extraction.



# Boost Your AI-Powered Content Generation

1

## Category Shred

VisibleThread's 'Category Shred' structures our data for AI input and prompting.

2

## Match-Datasets

We prepare structured, relevant data to feed into our GenAI system. We also evaluate partner data for relevancy.

3

## Content Creation

GenAI generates capability statements and past performance writeups with consistency and hyper-speed.



# Enhancing Team Efficiency

## 1 Integrated Workflow

Our usage of VT Docs seamlessly integrate into daily operations, from opportunity review, identification of relevant contracts to evaluating potential partner capability claims.

## 2 Time Savings

We've achieved significant time savings + improved accuracy, allowing us to handle more opportunities without performance degradation.

## 3 Increased Capacity

Our team's capacity has grown, leading to higher response production rates without success degradation.







# Lessons Learned and Future Outlook



## Innovation

Retooling a team requires a simultaneous retooling our approach and thinking. Stay curious and experiment.



## Collaboration

A collaborative approach is key when adopting new tools and methodologies. Share successes and failures within the team.



## Future Growth

Standardize your approach. Develop common and shared Concept Dictionaries. Document your workflow process to train others.



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Next Session

# Generative AI Prompting for GovCon Success



Kyle Peterson  
Vice President of Customer Success

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

# Agenda



01. What is a prompt?

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02. Types of Prompts

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03. Demo

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# What makes a good prompt?

- **Characteristics of a good prompt:**
  - Clear and concise: Avoid ambiguity to prevent misunderstandings.
  - Specific, when necessary: Include relevant details for targeted responses.
- **Examples**
  - "Describe the plot of 'Inception' in three sentences."
  - "Imagine you've woken up on an uninhabited island. What are your immediate next steps?"

# What makes a good prompt?



Prompt Type	Use Case Summary	BD/Capture	Proposal Mgmt	Writing/Tech Pubs	Operations
Scenario-based prompting	Black hat/competitive analysis Focus on differentiators, strengths/weaknesses	●	●		



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Policy & Procedure Prompting	Draft a supply chain risk mitigation policy focused on cybersecurity				●

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Utility-prompting	Simplify, reframe, and inject style/tone into content		●	●	
Policy & Procedure Prompting	Draft a supply chain risk mitigation policy focused on cybersecurity				●
High volume / template – based prompting	Draft letters, audit reports, and/or monthly status reports				●

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# Q&A



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# Thank you

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