VisibleThread

CMS

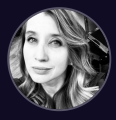
CUSTOMER SUCCESS STORY

Structure Under Pressure.

How Karisha Stanley and Michele Raymond turned a chaotic RFQ into a repeatable proposal process at CMS Contract Management Services.



Karisha Stanley
Business Development Analyst



Michele Raymond
Quality Assurance Analyst

CMS CONTRACT MANAGEMENT SERVICES
A DEPARTMENT OF BREMERTON HOUSING AUTHORITY

CMS Contract Management Services ensures affordable properties across the nation are compliant with federal HUD requirements. CMS first used VisibleThread for Doc Compare on HUD compliance reviews, then pulled the thread further into business development. When a tight RFQ landed with the BD lead on PTO, the team fell back on old habits. After that experience, Karisha and Michele took the opportunity to build a stronger process with VisibleThread and focused on hot buttons, the shred, the compliance matrix, and the gap analysis.

The Challenge

Every pursuit is an opportunity to help more residents afford their housing, so a scramble to the finish line was more than an inconvenience. Pressure exposed a process that relied on habit, not structure.

HABIT RISK

Falling Back Under Pressure

With the BD lead out and a tight deadline, the team leaned on old content, campaigns, and visuals. Quality reviews had little time for follow-up action.

WRITER RISK

Writing Without Guardrails

Technical writers had to jump in and hope they were interpreting the requirements correctly. There were only 10 days to respond, and it could have been helpful to have more ways to know that all requirements were being covered.

INSIGHT RISK

Reading Between the Lines

Sometimes the things that matter most to a customer are not expressed directly. Finding them, and turning them into win themes, takes more than a read-through.

From Chaos to Structure

After returning from PTO, Karisha did an after-action review of the process and took the opportunity to lay out what the next solicitation response would look like.

STEP 01

Surface the Hot Buttons

Uncover what the RFP doesn't say outright and draft win themes.

STEP 02

Shred and Assign

Shred the must, shall, and should statements into a compliance matrix.

STEP 03

Check as You Write

Run gap analysis and an unsupported claims review on the draft.

THE FIRST HOUR

Shred the solicitation to inform the go/no-go decision

Build the compliance matrix

Assign each requirement to a person

WHAT EACH WRITER GETS

A clearly assigned section

The requirement, with a prompt on what a good response looks like

The win themes to weave in

> **This is your section, here's a prompt, and here's what a response an evaluator would score highly looks like.**



Karisha Stanley
Business Development Analyst, CMS Contract Management Services

Capabilities in Action

HOT BUTTONS 01

Win Themes From What the RFP Doesn't Say

Using VisibleThread's AI as a research assistant, Karisha surfaced three unstated concerns: processing accuracy, transition risk, and staffing stability. She prioritized them by risk, then handed the resulting win themes to writers.

COMPLIANCE SHREDDING 02

From Shred to Compliance Matrix

The team shredded the must, shall, and should statements to understand what was being asked. The shred became the compliance matrix, with every section assigned to a writer alongside guidance on a good response.

GAP ANALYSIS 03

Gaps and Unsupported Claims, Caught While Writing

Responses were rated by evaluation section and by requirement, from outstanding to weak. Vague claims, like an unproven backup processor protocol, were flagged so writers could add the evidence.

The Impact

A structure the whole team could follow

In the after-action review, VisibleThread and the compliance matrix were repeatedly cited as valuable tools. Writers valued having something to rely on that shaped and prompted their writing.

Writers who would do it again

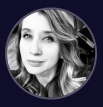
After the Utah RFQ, the reaction was "I never want to do this again." After the OHFA pursuit, it became "Yes, I would do this again. Sign me up."

Claims backed by evidence

The unsupported claims review gave the team a neutral third party that doesn't care whether they win or lose, backing up the call for proof points.

Learning from every outcome

The Utah RFQ ended in a win. The OHFA pursuit came down to cost, so the team requested the winning proposal and compared it to their own. They tied on system familiarity and learned where to describe their processing work better.



"The customer support was fantastic, and we really appreciate you helping us through that difficult process. You helped us get to a win."

Michele Raymond, Quality Assurance Analyst, CMS Contract Management Services

Why VisibleThread

Proposal teams need structure that holds when the pressure is on. VisibleThread gives every stage a guide, and keeps people in charge of the decisions.

Deterministic Engine

Shredding for any term, compliance matrix creation, and Doc Compare. Rules-based and repeatable.

AI With Guardrails

Hot button discovery and gap analysis grounded in the RFP and your own documents. AI supports the decision; people make it.

Workflow in One Place

Assign sections, comment, review, and track progress against the deadline, all in one shared view.