

Monkeys to Whales: Balancing Conflicts within Proposal Systems

Contract Size / Considerations	Canned Content vs. Custom Written for that Bid	Pre-proposal Needs from Sales	Manual Proposal Applications*	Proposal Automation*
<p>\$\$\$\$</p> <p>Whale</p>	<p>5 - 15% Canned</p> <p>85 - 95% Custom</p>	<ul style="list-style-type: none"> Confidential insights from customer exec/friend 1-3 levels above end-user (customer who manages contract) Info on corp. initiatives & their relationship to contract & bid Deep insight into eval team's personal & professional motivations 	<p><u>InDesign</u></p> <ul style="list-style-type: none"> (+) Sophisticated desktop publishing (+) Ability to match one-off customer designs (-) Specialized skills needed (-) Time intensive (-) Limited automation 	<p><u>Loopio</u></p> <ul style="list-style-type: none"> (+) Sophisticated, cloud-hosted, RFX (RFI, RFP, RFQ, etc.) automation (+) Intakes RFX files into system (+) AI library prompts best answers to RFX questions (+) Contributor (SME) assignments & project management alerts (-) Significant work setting up content & business processes (-) More expensive than lesser automated options
<p>\$\$\$</p> <p>Elephant</p>	<p>15 - 35% Canned</p> <p>65 - 85% Custom</p>	<ul style="list-style-type: none"> Confidential insights from end-user/friend Info of site-specific initiatives, pains & gains Insight into eval team's personal & professional motivations 	<p><u>Word</u></p> <ul style="list-style-type: none"> (+) Familiar, almost everywhere (+) No additional costs within Microsoft Office (+) Common authoring tool for other technologies (+) Capable of sophisticated desktop publishing (-) Advanced Word skills needed for desktop publishing (-) Limited automation 	<p><u>ClientPoint</u></p> <ul style="list-style-type: none"> (+) Easy to use & efficient cloud-hosted, proposal automation (+) Incorporates many non-Word files; video, PDF, PowerPoint, HTML, etc. (+) Customers sent to secure, web page with online nav & downloadable PDF proposal (+) Web analytics for web hosted pages (-) Substantial work setting up content & business processes
<p>\$\$</p> <p>Horse</p>	<p>75 - 90% Canned</p> <p>10 - 25% Custom</p>	<ul style="list-style-type: none"> Info of site-specific pains & gains Awareness of evaluation process Awareness of final authority (spend decider) Generic vertical market criteria 	<p><u>Word</u></p> <ul style="list-style-type: none"> (+) Familiar, almost everywhere (+) No additional costs within Microsoft Office (+) Common authoring tool for other technologies (+) Capable of sophisticated desktop publishing (-) Advanced Word skills needed for desktop publishing (-) Limited automation 	<p><u>ClientPoint</u></p> <ul style="list-style-type: none"> (+) Easy to use & efficient cloud-hosted, proposal automation (+) Incorporates many non-Word files; video, PDF, PowerPoint, HTML, etc. (+) Customers sent to secure, web page with online nav & downloadable PDF proposal (+) Web analytics for web hosted pages (-) Substantial work setting up content & business processes
<p>\$</p> <p>Monkey</p>	<p>98 - 100% Canned</p> <p>0 - 2% Custom</p>	<ul style="list-style-type: none"> Awareness of decision-making process Generic vertical market criteria Common commodity pains 	<p><u>Word</u></p> <ul style="list-style-type: none"> (+) Familiar, almost everywhere (+) No additional costs within Microsoft Office (+) Common authoring tool for other technologies (+) Capable of sophisticated desktop publishing (-) Advanced Word skills needed for desktop publishing (-) Limited automation 	<p><u>ClientPoint</u></p> <ul style="list-style-type: none"> (+) Easy to use & efficient cloud-hosted, proposal automation (+) Incorporates many non-Word files; video, PDF, PowerPoint, HTML, etc. (+) Customers sent to secure, web page with online nav & downloadable PDF proposal (+) Web analytics for web hosted pages (-) Substantial work setting up content & business processes

* Representative examples, not a comprehensive listing of available technologies