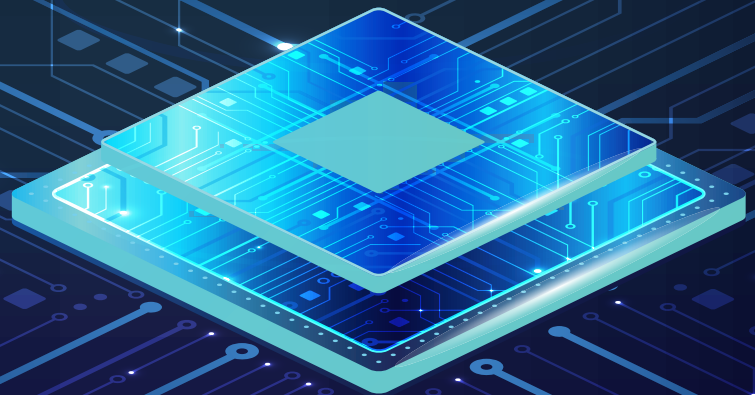




The Definitive Guide to AI in Proposal Management



A Message from QorusDocs' CEO, Ray Meiring

Generative artificial intelligence (GenAI) is creating a tidal wave of disruption across every industry, operational department, business process, and customer-facing interaction. B2B, B2C, D2C companies—they're all jumping on board to take advantage of the efficiency, productivity, analytical, and cost-saving benefits generative AI can deliver.

Plus, businesses are getting very excited about GenAI's personalization capabilities to improve customer service and boost the impact of sales and marketing efforts, such as creating a highly-engaging customer experience or generating customized content—text, images, video—that speaks directly to the needs of a specific audience.

An explosion of GenAI is occurring across consumer-facing applications, with countless B2C companies leveraging large language models (LLMs) like GPT-4 to uplevel their products and services. For example, Expedia has integrated ChatGPT into its app to help people [plan their next trip](#); Duolingo is leveraging GPT-4 LLM to create a personalized tutor experience, enabling users to interact with an AI-powered [persona](#) and carry out various learning-focused tasks; insurance giant [Allstate](#) has developed a generative AI app which vastly reduces the time for customers to report a claim after an accident. And this is just the tip of the iceberg.

In the evolving B2B landscape, companies are using AI to create better products, enhance their services, and improve business processes. We're seeing GenAI being used across diverse sectors and business practices, from [legal](#), [automotive](#), and [software testing](#) to [talent recruitment and staffing](#), [data analytics](#), and

[technical services](#), to name just a few.

There's no doubt as to why so many B2B organizations are embracing GenAI; the benefits of simplifying, accelerating, and optimizing business practices are immense. Companies are leveraging AI tools across the enterprise to create content, generate code, simplify and automate project workflows, enhance lead generation, tailor training, and optimize forecasting and pipeline management.

On the proposal management front, AI is transforming the response process to help companies optimize content creation, management, and storage and accelerate the deal cycle. With accessibility and implementation becoming easier by the day, it's time to consider how your organization can leverage AI to reinvent proposal management and the response process to help you win more business.

When it comes to creating pitches, proposals, responding to RFPs, and managing content, we don't want you to get left behind! We've compiled this guide to put you in the driver's seat, giving you the tools and resources to help navigate the complexities, challenges, and opportunities of AI in proposal management.

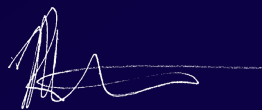


Table of contents

REDEFINING PROPOSAL MANAGEMENT	4
WHAT IS GENERATIVE AI AND CHATGPT?	5
Traditional AI vs. Generative AI	5
What is an LLM?	6
ChatGPT explained	6
BENEFITS OF GENERATIVE AI FOR CONTENT CREATORS	7
Analysis wizard	8
The most resourceful assistant ever	9
Streamlining the response process	10
BENEFITS OF GENERATIVE AI FOR PROFESSIONAL SERVICES	10
Creating winning pitches	12
Boosting engagement with visual appeal	13
Simplifying the pitch process	14
DOWNSIDES OF GENERATIVE AI	14
Beware: Garbage in, garbage out	15
Review, refine, personalize	15
Privacy considerations	16
COMPARING CHATGPT, MICROSOFT COPILOT, AND QORUSDOCS AI	17
ChatGPT-4	17
Microsoft Copilot	18
The ChatGPT and Microsoft Copilot connection	19
QorusDocs AI vs other Copilots	20
THE QORUSDOCS AI STRATEGY	21
Secure platform	21
Focus on business development and proposal teams	22
Microsoft Copilot integration	22
The QorusDocs AI difference for services firms	23
Selecting the right AI software	24

REDEFINING PROPOSAL MANAGEMENT

As companies increasingly rely on RFPs, pitches, and proposals to win new business in an unpredictable economy, tight timelines and the demand for personalized, compelling response documents are levying a heavy burden on bid and proposal teams. To alleviate the strain on resources, more and more organizations are turning to generative AI tools for relief, creating a fundamental shift in how they manage their proposal and RFX response process.

Already a gamechanger in other industries and use cases—[57%](#) of marketing leaders surveyed are using generative AI to create more content in less time, with 81% currently using AI expecting their use of AI to increase in the next year—companies are leveraging LLMs (e.g., GPT-4) to draft initial content for proposals and RFX responses in a fraction of the time it takes a human.

Rather than having to start drafting content from scratch, bid and proposal teams can spend their valuable time reviewing, revising, and customizing the AI-generated content—saving time, resources, and effort while producing higher-quality response documents that stand out from competitors to win deals.

With AI as an ally augmenting the RFP response and proposal development process, companies can boost productivity to achieve more with less, freeing up team members to focus on more high-value strategic activities, such as fostering longstanding client relationships and securing new business.

Today, [law firms](#) are using AI-powered proposal management software to eliminate inefficient manual processes and simplify and accelerate the pitch and proposal process; [technology companies](#) are streamlining content management with a centralized content hub to create winning proposals and RFP responses quickly and efficiently; [IT services firms](#) are leveraging AI-driven proposal automation solutions to boost the efficiency of the response process and accelerate the deal cycle to drive new business revenue.



Looking ahead, generative AI tools (e.g., ChatGPT, Microsoft Copilot, QorusDocs AI) will further enhance and optimize proposal management, revolutionizing the response process to take efficiency, creativity, and productivity to unforeseen heights.



WHAT IS GENERATIVE AI AND CHATGPT?

Generative AI and ChatGPT regularly crop up in the news, on social media, and in business strategy planning sessions at companies worldwide. From the consumer sphere to B2B environments, the rising tide of generative AI is seeping into all areas of our lives. Your niece is using [Microsoft Copilot](#) (powered by [OpenAI's GPT](#)) to write her term paper; your colleague is using ChatGPT to lighten the load of [compiling his end-of-quarter reports](#); you've heard industry experts extol the virtues of generative AI and ChatGPT for boosting efficiency and productivity across many processes, from healthcare and [manufacturing](#) to [professional services](#) and academia. What is all the buzz about? And what exactly are generative AI and ChatGPT?

Traditional AI vs. Generative AI

Over the past several decades, AI has been increasingly driving technology advancements and operational efficiencies across numerous industries and business processes. Traditional AI systems use predetermined algorithms

and rules to perform preset tasks and are primarily used to analyze data and [make predictions](#) or generate outputs. Examples of [traditional AI](#) in day-to-day life include Google's search algorithm, voice assistants like Siri or Alexa, and Amazon or Netflix recommendations.

Generative AI is the next generation of artificial intelligence. In contrast with traditional AI, generative AI applications can create something original; they can generate content, images and computer code—even [create video from text](#)—based on user prompts and training data sets.

In the proposal management context, generative AI can be used to quickly generate draft proposals and RFX response documents, enabling the bid and proposal team to focus on refining and customizing the draft content to optimize client engagement and boost win rates.

What is an LLM?

Generative AI applications, like [ChatGPT](#), [DALL-E](#) and Google's [Gemini](#), are part of the broad category of machine learning (ML) that have been trained on LLMs. Simply put, an [LLM](#) is a trained deep-learning model that understands and generates text in a human-like fashion; it can perform a range of natural language processing (NLP) tasks, such as generating and classifying text or translating text into different languages.

The ["large" label](#) refers to the number of values, aka parameters, the LLM can change autonomously as it learns—sometimes as many as hundreds of billions of parameters. Indeed, LLMs are trained with vast amounts of data, employing deep learning algorithms to generate very well-structured, sensible, and human-like responses.

ChatGPT explained

Chat Generative Pre-trained Transformer, known familiarly as ChatGPT, is a [conversational AI chatbot](#) capable of understanding and generating coherent and logical sentences by looking at high volumes of text examples

(e.g., articles, web content, prior winning RFP responses) and learning patterns of how words and sentences are put together. ChatGPT makes use of NLP to interact in a conversational way, engaging with and responding to natural human language.

The bottom line is that ChatGPT enables the user to have human-like conversations, answering questions and assisting with tasks such as composing emails, drafting reports, or reformatting text. In the words of OpenAI, the creators of ChatGPT, the dialogue format “makes it possible for [ChatGPT](#) to answer follow-up questions, admit its mistakes, challenge incorrect premises, and reject inappropriate requests.”

BENEFITS OF GENERATIVE AI FOR CONTENT CREATORS

By automating manual, repetitive tasks to increase efficiency, generative AI tools like ChatGPT can help content creators save time and boost productivity, generating larger volumes of content faster and with significantly less effort.

On the proposal management front, ChatGPT simplifies and accelerates the process of building assets for [proposals](#), [pitch decks](#), RFP responses, and other [sales documents](#). B2B companies can think of generative AI as a magic wand for the proposal team and content creators in the organization, helping them:

- Speed up the research process before drafting content
- Eradicate writer’s block with [unlimited inspiration](#)
- Boost efficiency and productivity of the content generation process
- Improve the accuracy of question-answering
- Automatically draft sales emails to prospective clients
- Reduce burnout of proposal team and other content creators

Analysis wizard

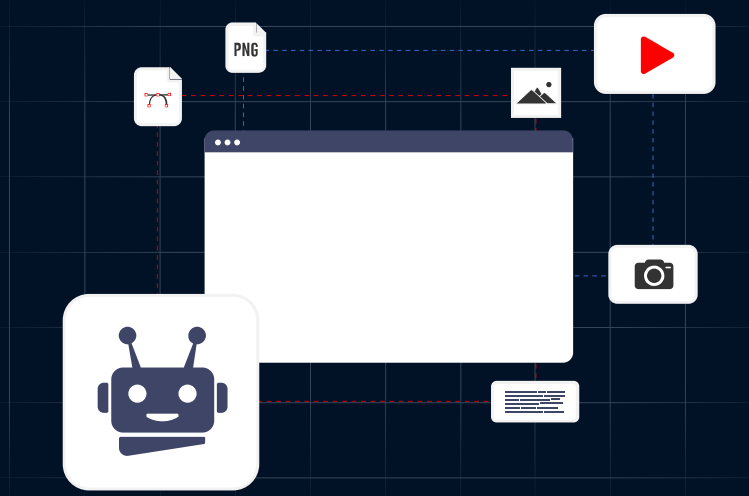
To deliver this wealth of productivity benefits, ChatGPT takes data analysis to an entirely new level. Generative AI applications can analyze content from a variety of sources, such as the public domain, in-house content (e.g., past client proposals, marketing collateral, predefined answers), or expert content housed in a separate database—and it can do it in the blink of an eye.

Using massive volumes of content as inputs during the analysis process, ChatGPT collates all of the data, finds the relevant data points, and generates original content based on the analysis and research. The entire process transpires in an instant, generating valuable, real-time draft content to use in proposals and pitches and minimizing the time spent responding to long lists of RFP questions.



Pro tip:

Generative AI is designed to augment content creators' capabilities, not replace them.

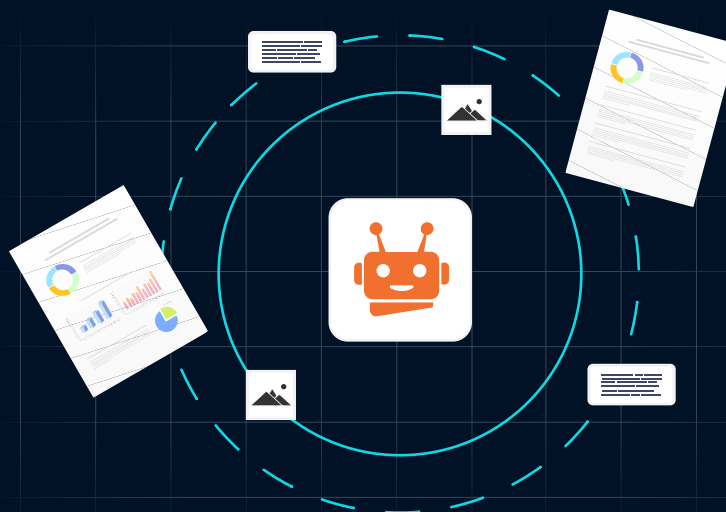


The most resourceful assistant ever

With a generative AI tool like ChatGPT at their disposal, bid and proposal teams can [research, write, and analyze content](#) without the lengthy time commitment or heavy burden on staff, stakeholders, and resources. Instead of having someone on the team focused on providing answers from a static set of pre-defined answers, ChatGPT functions as a top-notch writing and research assistant, analyzing content to derive the best answers and formulating new text based on analysis to [optimize the response process](#).

Whether creating content for a proposal, answering an endless list of RFP questions, or generating [bios and CVs](#) for pitch documents, AI tools do the heavy lifting by swiftly creating a baseline draft. B2B businesses can personalize the draft document and tailor the tone and voice to the needs of the audience (e.g., prospective customers, existing clients) to create highly engaging content, quickly and seamlessly.

With pre-drafted content, the focus shifts from the writing to the strategy around creating content: “What’s the thought behind this content series? What themes do we want to build into our content?” As a result, proposal writers and other marketing content creators can create more strategic content that resonates with customers and prospects to boost conversion and win rates.



Streamlining the response process

The response management process can be time-consuming, cumbersome, and frustrating for team members tasked with responding to large numbers of RFPs and creating high volumes of pitches and proposals. Generative AI tools like ChatGPT create efficiencies in the proposal and [RFP response workflow](#) that enables businesses to produce a greater volume of high-performing response documents by:

- automating content creation;
- improving content quality and accuracy;
- increasing content variety;
- ensuring brand consistency; and
- generating personalized content that resonates with prospects.

Plus, [proposal management software](#) powered by generative AI can repurpose old content into different formats (e.g., from product demo to [sales presentation](#)) or in a different use case for multiple audiences, simplifying the content creation process to increase productivity.

BENEFITS OF GENERATIVE AI FOR PROFESSIONAL SERVICES

With the potential to [change the anatomy of work](#), generative AI has transformed the workplace across multiple industries, augmenting the capabilities of individual workers by automating some of their repetitive or time-consuming activities. In fact, according to a 2023 McKinsey [report](#), current generative AI and other technologies have the potential to automate work activities that absorb 60% -70% of employees' time today.



AI and ML are those rare technologies that have the ability to be a win for everyone, as automation not only lowers costs but also improves the employee experience—but it must be used in conjunction with human skills and oversight.

-- [Brandon Hall Group](#), 2023

For professional services organizations, generative AI has [reshaped the business landscape](#), unlocking efficiencies, data-driven decision-making, and innovation and creativity to streamline and simplify the response process and win more business from new and existing clients.

- **Increased efficiency and productivity** – automate repetitive and mundane tasks, enabling legal, accounting, and consulting professionals to focus on higher-value work. Saves time and money while enhancing the customer experience.
- **Data-driven decision-making** – analyzes complex datasets, identifies patterns, and improves decision-making capabilities of professional services organizations (e.g., helps financial services professionals make more informed decisions by swiftly processing market data, predicting trends, and providing investment recommendations).
- **Simplified content management** – streamlines document creation, document storage, and review processes. Can generate documents based on predefined templates to save time and reduce human error. Assists in contract analysis by flagging potential risks and inconsistencies to heighten accuracy and mitigate compliance risks.
- **More effective project management** – unlocks [real-time visibility](#) into the professional services workforce. Shines a spotlight not only on available people and skills but also on the best combination of individuals for the project at hand.

- **Inspired thinking** – generates new ideas, designs, and solutions to offer inspiration and fresh perspectives and foster innovative, creative thinking to solve client problems.
- **Personalized client experience** – leverages vast amounts of client data to analyze preferences, behaviors, and feedback. Enables firms to tailor pitches, recommendations, and solutions to clients' unique needs to improve engagement and win more business.

Creating winning pitches

With its ability to analyze and generate content, generative AI is revolutionizing the pursuit process, transforming how professional services firms approach pitch and proposal development. ChatGPT tools streamline the labor-intensive process of content creation, finding the most relevant information in alignment with a firm's strategic objectives.

AI-powered proposal management software also tackles the critical issue of data accuracy—a costly and sensitive challenge many professional services firms face—by ensuring that pitch assets (e.g., biographies, experience records, credentials) remain up to date.

The pitch process at a law firm, for example, typically focuses heavily on biographies, CVs, and experience records and credentials based on previous legal work. Without ChatGPT in its toolbox, a business development or pitch team will waste valuable time identifying and locating the best bios and the most relevant experience records to pull into the pitch document.

Generative AI alleviates this challenge, eliminating the time-consuming manual workflow by analyzing an organization's data and identifying the best information to create a winning pitch, based on the strategy that the firm has set out.

Secondly, generative AI writes or updates the asset (e.g., a partner's biography), capturing, assimilating and tailoring the data to create winning

content aligned with the deal strategy, while maintaining the formats and relevant layouts of the pitch document.

Boosting engagement with visual appeal

Some recent generative AI tools can create images—a valuable feature for helping pitches stand out from the competition. While incorporating the right data and content is critical for the success of the pitch, adding graphics can enhance the message and improve client engagement.

Generative AI **generates images** by learning patterns and structures from existing images and then using that knowledge to create new ones. Some image generative AI models enable **text-to-image synthesis**, converting textual descriptions into corresponding visual representations. OpenAI's **DALL·E 3** is a good example of how ChatGPT can now create unique images from a simple conversation.

Employing images generated by ChatGPT technology can take a pitch to the next level, helping to tell a story that aligns with a firm's pitch theme; the images are tailored to the unique client pitch to create an impactful and personalized client experience.



Simplifying the pitch process

Generative AI streamlines the pitch process for professional services firms, empowering fee earners to issue natural language instructions for pitch creation and simplify the often complex and time-consuming task of building a pitch from scratch.

For example, a lawyer looking to generate a pitch themselves can instruct ChatGPT—in the same way they would ask an assistant or paralegal—to create a pitch that includes biographies pertaining to deals in a particular practice area at a specific dollar value. Generative AI will research, analyze, and write the pitch, simply through issuing an instruction.

With generative AI and ChatGPT tools and technologies at their disposal, professional services firms can boost efficiency, improve pitch quality, and work smarter to achieve better outcomes—enhancing their competitiveness in the market to drive profitability and sustainability.

DOWNSIDERS OF GENERATIVE AI

Generative AI has the potential to deliver productivity and efficiency benefits across the organization. However, understanding the **risks** of generative AI is integral to creating high-quality content and protecting the reputation of your organization. Potential concerns include:

- Data quality
- Data security and privacy concerns
- Ethical considerations of transparency, accountability, and compliance

For anyone's who's dabbled with writing documents using generative AI or asking ChatGPT to answer random questions, they'll have quickly realized that generative AI is not a perfect technology. The content AI-powered tools

generate may be out-of-date, biased, plagiarized, or outright wrong—often with serious consequences.

Beware: Garbage in, garbage out

Generative AI functions like any other algorithm, following the principle of “garbage in, garbage out.” As a result, generative AI applications must be pointed at a source of accurate facts (e.g., an approved closed data set or gated content library) or they will hallucinate, i.e., make up information that’s rife with inaccuracies and errors and is unsuitable for use.

Hallucinated AI content in the realm of proposals and RFP responses is a serious issue, potentially dealing a detrimental blow to brand reputation, win rates, and sales revenue. To mitigate risk, organizations need to ensure generative AI tools are trained on a library of accurate facts and work exclusively in that area.

Review, refine, personalize

While generative AI is a valuable tool for generating content, the review step is critical; content produced by tools like ChatGPT, Microsoft Copilot, or Gemini is only as accurate as the data set it was trained on. Content creators that rely on data from the public domain, instead of verified closed datasets or up-to-date content libraries, are highly susceptible to drafting content rife with inaccuracies, mistakes, and outdated information.

Thoroughly reviewing, editing, and supplementing any generative AI results or draft language is a crucial step in the content creation process. Depending on the content—whether writing an internal report, answering questions for an RFP, or drafting a proposal to be sent out to a prospective client, for example—organizations may also need to conduct a further level of editing and finessing in order to address the unique needs of the customer.

In addition to reviewing the accuracy and relevance of the content, bid and proposal teams need to consider voice, style, and length of the response and tweak the first draft accordingly to optimize engagement and impact.

Privacy considerations

Microsoft, Google, and Meta [train their AI models](#) on users' conversations, documents, and photos. X (formerly Twitter) also [uses public data](#) (e.g., users' biometrics, job, and education history) for AI training and machine learning. Data privacy is quickly becoming a hot topic in the world of generative AI—and B2B organizations need to pay attention when dipping their toe in these waters.

Understanding the difference between public-facing and private generative AI tools is imperative for ensuring ring-fenced enterprise data does not leak into the public sphere. Unfortunately, if an organization leverages generative AI apps for content creation, the [risk of data breaches](#)—accidentally sharing intellectual property or confidential and/or sensitive information—is high.

In plain language, by taking confidential business information and passing that data into the public domain using a public-facing AI tool like ChatGPT, a company has effectively authorized the public domain to “learn” the organization's information. In certain cases, data will be stored for a period of time to allow the generative AI model to learn and grow based on that information.

The bottom line is that it's vital for organizations to know which AI agent they're using and what information is being passed on to which of those agents. Skipping this step can be highly problematic for businesses. Case in point: Samsung learned this lesson the hard way when an employee inadvertently [leaked confidential information](#) from the company's source code to ChatGPT.

Being aware of the risks and limitations of generative AI and implementing best practices to thoroughly vet and edit any content generated by AI tools mitigates the risk of errors and data security issues. With the right considerations, generative AI can transform the practice of content creation for bid and proposal teams, accelerating and simplifying the process to boost productivity, optimize the response process, and drive business growth.

COMPARING CHATGPT, MICROSOFT COPILOT, AND QORUSDOCS AI

With multiple generative AI tools on offer, understanding the difference between the various tools—and how to choose the right one(s) for your organization—can be a challenge. What roles do ChatGPT, Microsoft Copilot, and QorusDocs AI play in the organization?



ChatGPT-4

As discussed earlier, GPT-3, GPT-3.5, and GPT-4 are advanced language processing AI models developed by [OpenAI](#), trained on a vast amount of human language via data from the internet, including books, articles, websites, and social media. GPT-3.5 currently powers the free version of ChatGPT aimed at individual users.

Following the research path from GPT, GPT-2, and GPT-3, OpenAI's [deep learning approach](#) continually leverages more data and more computation to create increasingly sophisticated and capable language models. The most recent version, GPT-4, can solve difficult problems with greater accuracy, thanks to its broader general knowledge and problem-solving abilities. Less likely to invent facts, the advanced AI engine can handle over 25,000 words of text, enabling use cases like long form content creation, extended conversations, and document search and analysis.

Overall, [ChatGPT-4](#) is smarter, can understand images, and process eight times as many words as its ChatGPT predecessor. ChatGPT-4 capabilities are available in all paid ChatGPT plans, and users can also fine-tune and set up various OpenAI APIs with the same capabilities.

Microsoft Copilot

Microsoft Copilot is an AI assistant, powered by OpenAI's LLM. There are multiple Copilot options for consumer and enterprise use. At a general level, Microsoft's Copilots are the tech giant's AI companions. Microsoft has released several Copilots that can complete different tasks for different purposes.

Here is a brief overview:

Microsoft Copilot (previously known as Bing Chat). Microsoft [describes](#) Copilot as “like having a research assistant, personal planner, and creative partner at your side whenever you search the web.” Users can ask complex questions and receive detailed replies; Copilot searches results across the web to offer a summarized answer and links to its sources. This free version of Copilot, billed as “your everyday AI companion” can also boost creativity, lending inspiration and helping users draft poems, stories, or create new images.

Copilot Pro (M365 for personal and family use). Microsoft Copilot Pro is designed for individuals, creators, and users looking to take their Copilot experience to the next level and costs \$20 user/month. Additional Copilot Pro features include direct integration with Word, Excel, PowerPoint and Outlook (but not Teams) and users can build their own Copilot GPTs tailored to their individual needs and interests.

Copilot for Microsoft 365. Built for enterprise users, Copilot for Microsoft 365 is the option for business use, a choice for organizations looking to ease digital overload, save time, and boost productivity and creativity.

The Copilot for Microsoft 365 “system” consists of [three elements](#): Microsoft 365 apps (e.g., Word, Excel, Teams) where users interact with the AI assistant; [Microsoft Graph](#), which includes files, documents, and data across the Microsoft 365 environment; and the OpenAI LLMs that process user prompts: OpenAI's ChatGPT-3, ChatGPT-4, DALL-E, Codex, and Embeddings.

Backed by enterprise-grade security, privacy, and compliance, [Copilot for Microsoft 365](#) generates text and tables in Word, analyzes data and creates visualizations in Excel, designs presentations in PowerPoint, summarizing and drafting emails in your Outlook inbox, summarizes meetings in Teams, and more.

Microsoft has built Microsoft 365 Copilot with its existing commitments to data security and privacy in the enterprise, grounded in [AI principles](#) and [Responsible AI Standard](#) and decades of research. Copilot’s LLMs are not trained on customer content or on individual prompts.

Copilot for Microsoft 365 costs \$30 user/month. Note: a Microsoft 365 Business Standard or Microsoft 365 Business Premium license is required to purchase Copilot for Microsoft 365.

The ChatGPT and Microsoft Copilot connection

Microsoft has an ongoing partnership with ChatGPT creator OpenAI, embedding Copilot, its AI-powered digital assistant, within its suite of Microsoft 365 business productivity and collaboration apps—Word, Outlook, Teams, Excel, PowerPoint—to automate tasks and create content, potentially saving users time and enhancing productivity. According to [Microsoft](#), Copilot doesn’t just connect ChatGPT with Microsoft 365; it combines the power of LLMs with data in the Microsoft Graph (including calendar, emails, chats, documents, meetings, and more) and the Microsoft 365 apps to “turn your words into the most powerful productivity tool on the planet.”

In addition, Microsoft has [guaranteed](#) the security and privacy of the data used in their Azure OpenAI service and Copilots, and the company has promised to be transparent with users as they head into the future of AI use.



QorusDocs AI vs other Copilots

ChatGPT and Microsoft Copilot are excellent tools for general research and content creation but lack the specialization and content access that bid and proposal teams need to streamline their response process.

As general platform tools, ChatGPT and Microsoft Copilot are flexible and offer composable building blocks that can be adapted and combined as needed. Traditionally, this service is provided for clients by technology partners who can customize solutions to the client's unique needs. As a Microsoft partner, QorusDocs does just that. We offer a level of specialization difficult to achieve in a generalized solution. AI solutions are most valuable when tailored to an organization's unique needs and workflows, and in the case of QorusDocs, to the workflows present in professional services organizations.

For example, while platform AI tools can access vast swathes of data from the internet or your daily M365 applications, they're unable to specifically target fit-for-purpose content sources inside of an organization and put that data to work in your bid, proposal, and business development teams.

Additionally, QorusDocs AI offers pre-built prompts/skills highly utilized in professional services firms. These specialized prompts/skills help our clients expedite their mundane, repetitive tasks and can be customized based on a firm's unique requirements. As organizations grapple with increasing proposal volumes, these productivity gains enable firms to spend more time with their own clients and focus on their needs to deliver a higher-quality product and personalize solutions in the way only humans can.

Another advantage of QorusDocs AI is that it is provided directly inside of Microsoft 365 applications where people work every day. While platform tools (e.g., Copilot for Word and PowerPoint) are also available in the respective Office applications, their scope is limited to the current document or up to three extra files uploaded or referenced from M365 content sources. This limitation makes the use of these Copilots cumbersome for pitch, proposal, and RFP responses.

THE QORUSDOCS AI STRATEGY

QorusDocs has been working with AI technology for a number of years, starting with the release of the Auto Answer feature back in 2020. As we've watched generative AI technology evolve, we are excited about how it will solve some of the biggest time-consuming and labor-intensive challenges our customers deal with daily.

Secure platform

One of the fundamental pieces we established at the start of our generative AI journey was the choice of platform. Secure and private access to content is a critical concern of our customer base and users of QorusDocs—and we know there is a lot of concern about data privacy and security in the overall community.

We elected to build QorusDocs' AI strategy around **Microsoft Azure OpenAI** because:



It is a secure and private technology.



It doesn't make your content available to other Microsoft or QorusDocs customers.



It doesn't use your data for its own service or for training its models.



The QorusDocs application itself is based on Microsoft Azure.



Focus on business development and proposal teams

With the aim of helping organizations streamline and accelerate their response process to create customized proposals, pitches, and RFX responses, QorusDocs is releasing AI experiences that are unique to business development professionals and proposal teams.

Prompts tailored to the response process are built into QorusDocs as a starting point and users can refine the outcome. This industry-specific skill set will be useful for a scenario such as answering a question in a document when the user doesn't want to have to prompt the AI tool repeatedly; users will be able to pre-prompt it to answer but can also refine and tailor the outcome.

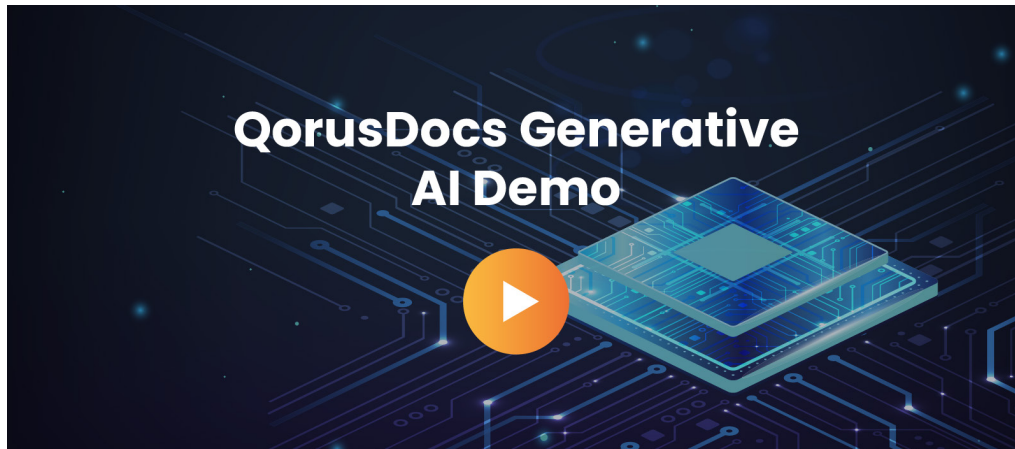
These functions enable companies to perform actions that are specific to proposal managers, writers, and business development in service organizations. *Note: these experiences are available within the QorusDocs application and do not require a Microsoft Copilot license.*

Microsoft Copilot integration

QorusDocs also offers integration with [Microsoft Copilot](#). Microsoft Copilot users can access content stored in their QorusDocs libraries. They can use this powerful AI tool to summarize RFP documents, rewrite content, and research content. QorusDocs is working very closely with Microsoft to make more and more QorusDocs features available directly from Microsoft Copilot. Working with Microsoft Copilot is a very natural experience for QorusDocs users because we encourage content creators to work directly in the



Microsoft Office platform. Bid and proposal teams can use their preferred Office application (e.g., Microsoft Word, Excel, PowerPoint, Outlook), the QorusDocs application, and [Microsoft Copilot](#)—all from within the familiar Microsoft Office environment.



The QorusDocs AI difference for services firms

QorusDocs is focused on delivering AI benefits for proposal teams in professional services.

1. QorusDocs AI is purpose-built with professional services skills that help clients tailor proposal writing to their audience, while giving them the ability to present content in layouts with compelling visual elements, such as grids, bulleted lists, contact cards, and tombstones for biographies and credentials.
2. To create a simple, streamlined workflow, QorusDocs AI is embedded directly inside of M365 apps, enabling teams to work seamlessly in their everyday environments.
3. The ability to integrate QorusDocs into an organization's primary sources of content is critical for efficiency, security, and simplifying content management. QorusDocs AI can seamlessly access and use any content stored in Microsoft 365.

4. QorusDocs augments customers' M365 content with:

- Data from other systems (e.g., CRM system)
- Data that is stored inside of QorusDocs itself
- Historical usage data

By pulling all of this data together cohesively, QorusDocs ensures professional services firms get error-free, contextual AI responses, without the concern of hallucinations or otherwise inaccurate content.



Selecting the right AI software

AI proposal management software can transform RFP response and pursuit processes, enabling organizations to spend less time on mundane manual tasks and invest more time in value-add, relationship-building activities to drive revenue.

Your [AI software selection](#) should include the following:

- **Data Protection and Privacy.** Is the software compliant with data protection and privacy laws? Will it protect your firm's private data?
- **Configuration.** Does the software offer configuration options to tailor its use cases to your firm's processes? Is it specialized enough to truly meet your needs?

- **Integration.** Can the software seamlessly integrate with your existing systems, data, and content?
- **Cost-effectiveness.** Is the software cost-effective in relation to the value it provides? Do you know how you'll measure ROI?
- **Support.** What level and quality of customer support does the vendor offer? What is their reputation in the market?
- **Scalability.** Can the software scale with your firm's growth?

At QorusDocs, we are here to help you leverage the power of AI tools to increase operational efficiency, curtail costs, and optimize resources to build a streamlined and simplified response process. [Learn more](#) about QorusDocs AI for creating personalized RFP responses, pitches, and proposals, including our AI for Response Management [video series](#).

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