



AI-powered QorusDocs Simplifies & Streamlines Content Management to Drive Growth

For more than 50 years, TRC Companies has been a leader in delivering professional services for public, private, and government clients. With the aim of streamlining its proposal process, TRC replaced its inefficient, disjointed content management system (CMS) with the cloud-based QorusDocs AI proposal management software. QorusDocs' centralized content hub provides TRC's Strategic Proposals Group with access to all proposal materials, simplified searchability, and a singular platform that helps proposal stakeholders collaborate in a more organized and intelligent manner. By automating and accelerating its proposal process with QorusDocs, TRC reduced operational expenses, increased productivity by >60%, and boosted win rates.

The Challenge: Lack of Centralized Content Hinders Growth

A leader in various industries—from utility, renewable, and advanced energy markets to intelligent grid systems, infrastructure, and environmental applications—TRC has a complex network of clients, projects, and programs around the globe that drives a constant requirement for proposal production. Organizationally, Strategic Proposals, Business Development, Legal, HR, and IT are part of TRC's Shared Services which facilitates project capture and conduct for the company's three sectors: Environmental and Infrastructure, Power, and Intelligent Grid Solutions.

Given the complexity of TRC's global operations, a lack of centralized content resources and consistent processes across the organization was undermining the efficiency and productivity of the Strategic Proposals Group. The company was

looking to refine its project capture process through systematic efficiencies, automation, artificial intelligence (AI) and generative AI, while implementing industry-proven best practices and improving proposal quality.

Prior to implementing QorusDocs within the Strategic Proposals Group, TRC used a handful of different proposal management solutions and CMS platforms but was lacking content accessibility, seamless collaboration, searchability of content, and the ability to share content with anyone in the company, even those without a license.

“We were looking for a flexible, user-friendly CMS that would be easy to incorporate into our current proposal process. We also wanted a secure solution that was robust enough to serve our various operational staff needs, while supporting our specialized processes for certain industries,” said Dr. Stephen Galati, Vice President, Strategic Proposals at TRC.



“TRC is excited to expand the use of QorusDocs companywide. Our partnership with QorusDocs has been dynamic from the very beginning, throughout our data categorization and initial set-up of the CMS to the implementation of the platform and support of change management. We’ve learned so much from QorusDocs’ QPilot and have begun the exciting proposal AI journey with our whole team to improve our proposals.”



Dr. Stephen Galati
CGW, CP APMP, CQA, Vice President, Strategic Proposals
TRC Companies

The Solution: Secure, Centralized Content Boosts Efficiency

The decision process

In the search for a proposal management platform that could handle its sophisticated content management and security requirements, TRC received demos from multiple proposal management software companies to evaluate which solution would best serve its needs and integrate smoothly into existing proposal workflows.

“As part of a corporate software streamlining effort, we participated in a six-month trial with a proposal management competitor but ultimately selected QorusDocs as the best solution, in part because of its integration with Microsoft SharePoint and our other existing

Microsoft systems and tools,” said Galati. “Plus, QorusDocs has the right level of flexibility to meet our business needs and facilitate quick adoption.”

The rollout

TRC deployed QorusDocs AI proposal management software to its Strategic Proposals and Advanced Energy groups in late 2022. “At the point that we started using QorusDocs, most of our content wasn’t centralized so we had a significant learning curve with mapping out how to categorize and tag our content,” said Galati. “We took our time to properly find all the locations where our proposal content resided, including office servers, individual directories, OneDrive, MS Teams collaboration sites, ProjectWise, and even laptop hard drives.”

“Throughout the process, QorusDocs staff met with us regularly, not only to help us through any issues and come up with solutions, but to teach us how to use the tools and fix issues on our own,” added Galati. “The QorusDocs staff have been extremely patient, receptive, incredibly helpful, and a pleasure to work with.”

After nearly two years of successful execution within the corporate proposals group, TRC decided to roll out QorusDocs’ sophisticated content management and proposal automation capabilities to the entire company and is working with the sectors to integrate their current environments with QorusDocs.

QorusDocs in action

TRC uses QorusDocs as a CMS and proposal automation tool, including the Pursuits function, to simplify content management, streamline collaboration, and expedite the proposal process to accelerate the sales cycle and generate more client wins. After working with QorusDocs, the proposal team reported very positive feedback related to time efficiencies, the reduction of global email requests about content, ease of use, and accessibility to clean, approved content for proposals.

“We use the platform to centralize and automate information for our growing company, creating a single source of truth for our data and enabling us to share information efficiently throughout the company,” said Galati. “The centralized and tagged content repositories make it so much easier to locate and share quality content and data relevant to TRC. We’ve noticed significantly less questions and group email requests and messages about where to find important information.”

Built on the secure Microsoft Azure platform, the user-friendly QorusDocs platform integrates seamlessly with frequently-used Microsoft applications, such as Word, Teams, or SharePoint. As a result, the Strategic Proposals Group can work in a familiar and secure Microsoft environment that is built and administered by TRC. “The proposal team quickly adapted to using the Microsoft add-ins, seamlessly fitting into our proposal process,” said Galati. “Our team loves the ease of starting a proposal from Word, plus the centralized and organized working files which we can share with non-licensed users.”

QorusDocs AI proposal management software is tailored to the way TRC conducts business across multiple sectors and divisions. The easy accessibility of data in TRC’s current SharePoint environment and the flexibility of that environment means multiple proposal teams can utilize the platform, from subject-focused groups to the corporate level proposal team.

Galati noted, “We appreciate the level of data security, accessibility, and flexibility QorusDocs provides. For example, any staff can review the whole proposal, instead of pieces. Since content isn’t stored on a third-party site, we have the assurance that our data is wholly accessible, secure, and housed internally.”

Looking ahead, TRC is planning to further integrate QorusDocs with some of its current systems for content storage outside of SharePoint. “For example, we intend to integrate ProjectWise, our company-wide project management platform, with QorusDocs for cleaner platform-to-platform, bi-directional communication. We’re also looking to integrate QorusDocs into our instance of Salesforce used for soft backlog and opportunity tracking,” said Galati.

Galati added, “I’ve found the experience working with QorusDocs to be professional, positive, and collaborative. Armed with fantastic training and knowledge resources, the team has been focused on delivering value and has kept us abreast of their product roadmap, including the QorusDocs generative AI strategy.”

Generative AI & QPilot

TRC is a highly technology-enabled company and has been integrating AI technology over the past year across internal and external platforms to help enhance overhead efficiencies and optimize time spent on certain tasks. “While acknowledging that AI tools are an enhancement and not a replacement for true proposal management specialization, we’re

exploring use cases with the Strategic Proposals Group to augment the proposal process through development of an AI-enabled proposal management toolbox,” said Galati.

“To this end, we were delighted to participate in the pilot program for QorusDocs’ QPilot and are currently reaping the benefits that this new platform enhancement has to offer, especially the ability to exponentially reduce time spent on the front end so we can focus on adding client-specific content to our submissions,” said Galati.

He added, “Given that QPilot is built on a Microsoft Azure AI platform, the integrations with our workflows were relatively seamless and the utility of Microsoft Copilot AI functionality is being maximized across the platform.”



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“We’re so excited about integrating generative AI features like Smart Skills and appreciate participating in the pilot of QorusDocs’ new AI Assistant, QPilot. The ability to summarize an RFX and extract important details, like timeline and minimum qualifications, will be a huge time-saver! We value the diligence QorusDocs is putting into the security aspect of this tool and feel confident that our data will not be used to train or feed an external system.”

 **Dr. Stephen Galati**
CGW, CP APMP, CQA, Vice President, Strategic Proposals
TRC Companies

The Impact

Increased Operational Efficiency

TRC’s proposal managers spend less time finding clean and approved standardized content and data, less time scouring drives for information, and less time sending global emails searching for past proposals and data. These efficiencies equate to a conservative estimate of 1,800–2,400 hours saved annually.

>60% Greater Productivity

With streamlined collaboration and sophisticated content management, QorusDocs has helped TRC boost the productivity of its proposal team. Using nearly the same resource levels, TRC has realized an increase in vetted proposal output by more than 60% since 2021.

Higher win rates

By optimizing content management, QorusDocs helped TRC improve the quality of its personalized proposal documents to drive client business. Since implementing the QorusDocs AI proposal management solution, TRC experienced more than a 11 percentile-point increase in win rates in the Strategic Proposal Group alone.

Cost Savings

By streamlining and accelerating the typically labor-intensive and time-consuming proposal workflow, QorusDocs AI-powered proposal automation software has become a cost-savings measure for TRC, with significant impact to the bottom line.

About TRC

TRC Companies is a global consulting, engineering, program, and construction management firm providing environmentally-focused and digitally-powered solutions. With more than 7,700 employees, TRC solves the challenges of making the Earth a better place to live—community by community and project by project.

www.trccompanies.com

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About QorusDocs

QorusDocs is a Bellevue, WA-based leader in AI-powered proposal management and RFP response software that automates the creation of personalized pitches, presentations, proposals, and RFP responses. QorusDocs allows business development, sales, marketing, and proposal teams to collaborate seamlessly, optimizing billable hours and increasing client wins. The company supports enterprise revenue teams from companies like Manpower Group, CDW, DLA Piper, Baker McKenzie, WSP, Insight and more.

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