

How to buy Proposal Automation software

A step-by-step guide for the consulting industry





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Introduction

In the fast-paced world of consulting, optimizing the proposal pipeline is crucial to securing clients.

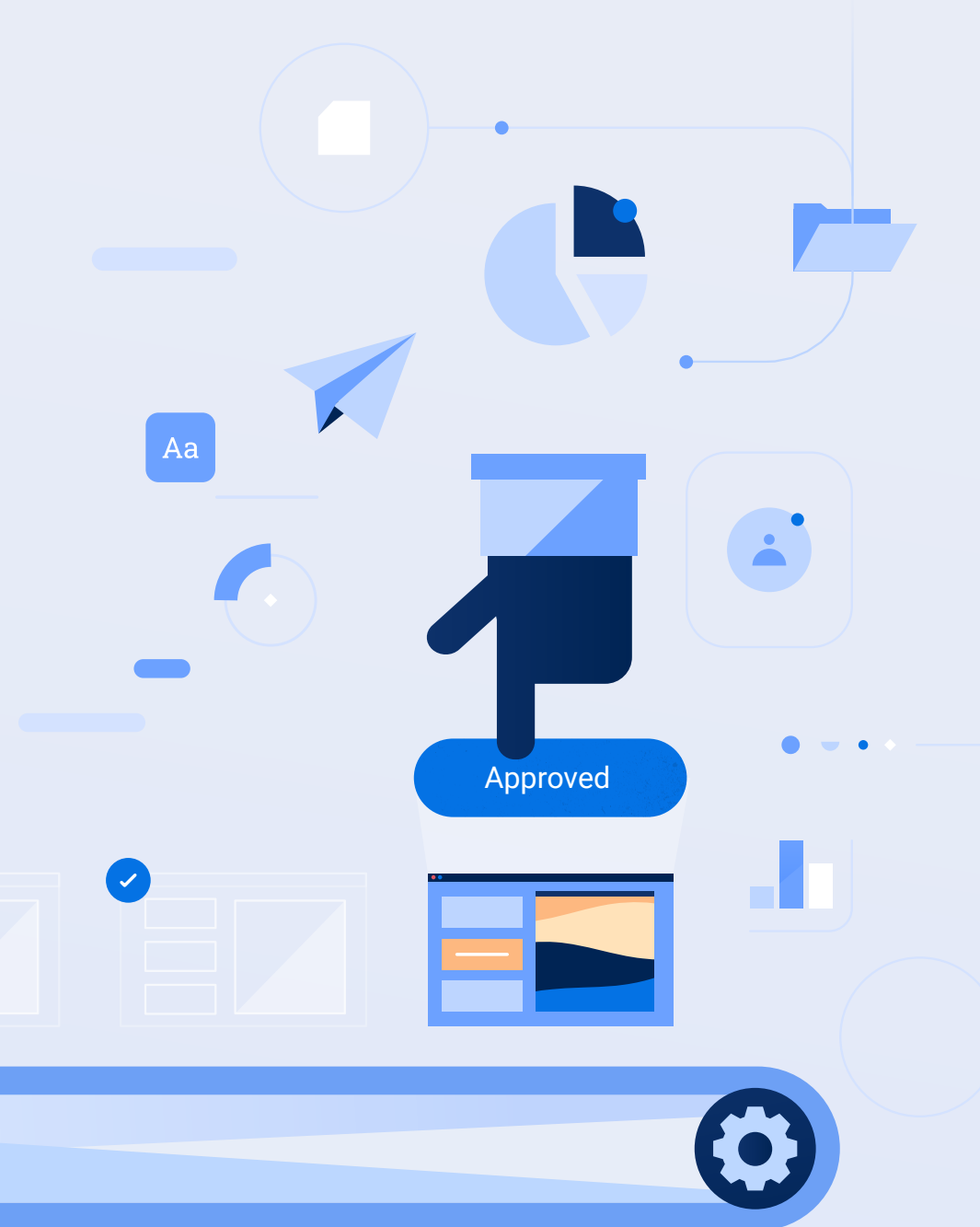
You've done your research and you know it's time to automate. In fact, your competitors are already harnessing the power of document automation to create stronger, more robust proposals, faster.

And that means they're winning more deals.

But introducing a proposal automation platform is a complex process that involves many stakeholders. It's imperative that the solution you choose adds value where it really matters.

From comparing vendors, to ensuring smooth implementation, this guide is your comprehensive roadmap to choosing the right proposal automation platform.

It's time to automate your proposal pipeline.



Which documents should you automate first?

Your organization is ready to automate its documents. Why start with proposals?

In consulting firms, the flow of documents is constant. From briefs and contracts, to emails and presentations, the scope for document automation solutions is wide.

Here are some important factors to consider when deciding which documents your organization should automate first.



Time

Which documents require the most resources?

For example, proposals take hours to complete. Quick tasks may not need automation.



Standardization

Should certain content be standardized?

For example, a pricing table or industry description included in a quote/introduction.



Value

Does the document carry high potential value?

For example, a commercial document that wins new business, such as a proposal.



Complexity

Does the document need data from internal/external sources?

For example, integrating internal database data with CRM systems like Salesforce.



Volume

Which documents do your firm create the most frequently?

For example, these should be the backbone of your document automation strategy.



Regulation

Does regulation require you to remove the risk of user error?

For example, a proposal relating to a regulated industry or sensitive data.

8 signs its time to automate your proposals

1	Difficulty in locating relevant content and slides	Proposals often encompass multiple sections – e.g. services, pricing, and product. Finding the right presentation slides is wasting valuable resources.
2	Low quality outcome	A proposal is a persuasive piece of content that should be accurate and compelling – not “Frankensteined” together, with no visual alignment, intuitive sequencing or storytelling.
3	Extended review and approval timelines	Proposals are often stuck for several days due to review processes, and waiting for feedback and approval from managers is causing delays that hinder workflow efficiency.
4	Concerns about data and content accuracy	Ensuring that sensitive data is accurately represented in proposals is crucial, but you don’t have sufficient insurance that only approved and accurate content is being used in all proposals.
5	Lack of integration between proposal software and other systems	Dependency on outdated systems is resulting in inefficiencies, due to the manual transfer of data and content between systems.
6	Time wasted on proposal creation or repurposing	Your team is essentially recreating the same proposal repeatedly, merely adding new data and content.
7	High incremental cost of increasing proposal throughput	Scaling up the number of proposals often comes with a substantial resource and cost burden, impacting the ability to secure more deals efficiently.
8	Manually compiling data and content	Consultants spend significant time manually gathering and integrating content from various sources, leading to a time-consuming process and potential inaccuracies.

5 risks associated with proposal automation software – and how to mitigate them

Executed well, proposal automation has the proven potential for huge ROI.

But unexpected challenges during implementation can disrupt workflows and hinder employee productivity and efficiency. Identifying and preparing for potential challenges is imperative to a smooth adoption.

Here are 5 potential roadblocks – and how you can avoid them.

1 The solution is too complex

The solution must prioritize ease of use for both administrators and end-users. Complex proposal automations could face a swift removal due to low adoption rates.

To ensure a user-friendly experience:

- Thoroughly test the software from both administrative and end-user perspectives.
- Consult with current customers to gain insights into their experiences with the software.

2 Slow implementation

A project plan that doesn't cover all stages of implementation – e.g. user experience and system integration – can lead to bottlenecks in adoption.

Avoid the pitfall of slow implementation:

- Choose a provider with a streamlined implementation process.
- Aim for a solution implementable within 2 – 6 weeks for technical implementation.
- Request and review an implementation plan, and engage with existing customers for feedback.

5 risks associated with proposal automation software – and how to mitigate them

3 Lack of security and compliance

Security is not merely a certification; it is integral to every organizational decision. Inadequate security and compliance measures can have catastrophic consequences when dealing with sensitive data.

To ensure robust security:

- Verify that the company holds SOC II and ISO 27001 certifications.
- Speak directly with their Chief Information Security Officer (CISO) to understand their approach to security.

4 Poor integration with workflows and systems

Integration capabilities are crucial. For optimal adoption, the solution must seamlessly integrate into employees' existing workflows and applications.

To ensure smooth integration:

- Confirm that the proposal automation software allows employees to start where they currently work.
- Verify compatibility with core applications, such as Word, PPT, Salesforce, SharePoint, and others.
- Ensure the platform is designed to support future growth by allowing for easy integrations into new systems.

5 The solution doesn't support all use cases

The proposal automation solution should be versatile, supporting multiple use-cases and document types. This flexibility is vital for scalability without additional and costly solutions.

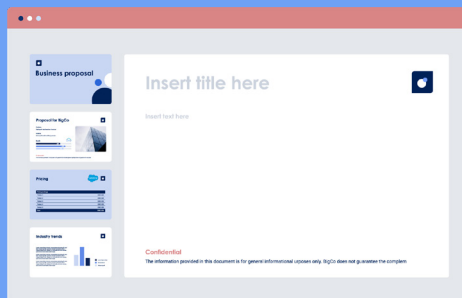
To find the most capable solution:

- Ensure the solution supports various document types and use-cases.
- Choose a solution versatile enough to accommodate manual, partially, and fully automated document creation processes.

The 3 layers of a proposal document – and why automating them matters

From an automation perspective, all proposal documents – whether created in PowerPoint, Word or Google Docs – are made up of three critical layers: template, data, and content. Below is a breakdown of each layer, and how they can be automated.

Template layer



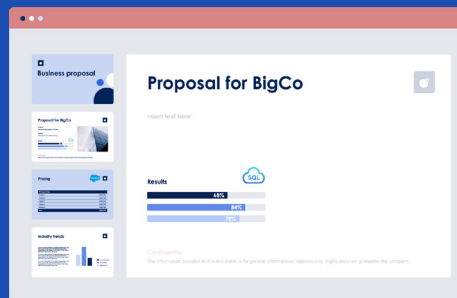
Importance: Ensures brand and policy adherence.

Automation: Update essential information (e.g. logos & disclaimers)

Benefits: Adherence to brand and policy guidelines.

Core stakeholders: Brand, IT, Risk, and Compliance.

Data layer



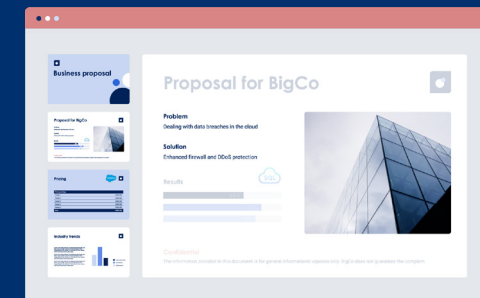
Importance: Ensures speed and accuracy.

Automation: Input data from internal and external sources.

Benefits: Faster and more accurate proposal creation.

Core stakeholders: Sales, Risk, and Compliance.

Content layer



Importance: Ensures optimal productivity.

Automation: Inserts new content and optimizes existing content.

Benefits: Better quality proposals with less time spent on manual tasks.

Core stakeholders: Sales, Risk, and Compliance.

How to transition from manual to automatic proposals

Not all company documents can be fully automated – and those that can will benefit from a gradual, staged introduction, to ensure all end users adopt their new solution confidently and correctly.

Below, we have broken proposal automation into **three levels** that can be used as stepping stones for gradual and methodical implementation.

Today

Using Microsoft Office

- Using PPT and Word to create proposals
- Potentially with a SharePoint integration to store slides and decks

Level 1: Assembly

Add a solution to ensure brand consistency and easy assembly of proposals

- Adding a proposal solution to ensure brand consistency across all products and make it easy to assemble a proposal

Avg time savings: 20% - 50%

Level 2: Creation

Integrate into various data sources to partially automate the proposal automation process

- Use user input to automate the creation of the proposal
- Integrate with internal and external data-sources

Avg time savings: 40% - 70%

Level 3: Automation

Full automation of the proposal with limited or no input from the user

- Full automation of proposal creation process
- Integrate with internal and external data-sources

Avg time savings: 80% - 99%

How can AI elevate my proposals?

Rule-based automation vs. AI: What's the difference?

Rule-based automation and AI are two related but distinct technologies. The right proposal automation platform will harness both rule-based automation and AI technologies where they can truly add value.

Rule-based automation

Rule-based automation is technology that follows a predetermined set of instructions or rules. It is used to perform repetitive tasks, typically at scale. Rule-based automation aims to increase efficiency, reduce errors, and save time.

AI (Artificial Intelligence)

AI is software designed to simulate human thinking. AI can make predictions and analyze patterns, based on data, making it suitable for scenarios that involve decision-making.

Which stages of the proposal automation process can benefit from AI?

Here's how AI can help to optimize each stage of the proposal automation process.

Stage 1: Template automation

The proposal template will be created with rule-based automation and not be impacted by AI.

Stage 2: Data automation

Data input will mostly be based on rule-based automation, however AI can be leveraged to create supporting content based on the data.

Stage 3: Content automation

The process of creating and editing content within the proposal can be greatly improved with AI.

Choosing the right provider: Ensuring AI safety

By choosing the right automation proposal solution, consulting firms can benefit from AI, while upholding company values and ethics, and ensuring the highest security standards for handling sensitive data.

Here are questions to ask proposal automation providers about their AI solutions:

Privacy and security: Are adequate measures in place to protect sensitive information and prevent any compromise of security?

Centralized control: Can the software be centrally managed, to ensure that your company can maintain control of branding and tone of voice?

Legal compliance: Have appropriate steps been taken to adhere to all regulatory requirements?

Ethics and data bias: What measures can be implemented to prevent biased outcomes and mitigate potential negative reputation effects?

Mitigating incorrect consumption: How can the risk of AI hallucinations be minimized to ensure safe usage?

Choosing a vendor: The checklist

You know that automation has the power to revolutionize your proposals. Now it's time to find a solution that meets your specific needs.

We've consolidated the most important questions for buyers to ask when shopping for a proposal automation solution. Here's your comprehensive checklist.

In this section:

- 09 Platform & administration
- 10 System architecture
- 10 End-user capabilities
- 11 Security & data
- 12 Implementation, support & training
- 12 Partnerships

Platform & administration

Choosing a strong software provider will mean your solution is built with the future in mind, so you won't need to replace it anytime soon.

Is the solution future proof?

The solution must adapt to your evolving business needs, fostering synergies with other software solutions. It should deploy updates seamlessly, without impacting the end-user.

Does the solution have the ability to scale?

The platform should have the ability to scale with your company's growth – for example, expanding into new markets, adding more users, increasing complexities, or adding languages. The platform should demonstrate a track record of effectively handling scalable solutions.

Does the solution have centralized administration and distribution?

The solution should facilitate template distribution and management without relying on IT resources. Centralized administration and distribution of templates and assets in a proposal automation platform ensure easy distribution and accurate permission control for the end user.

Choosing a vendor: The checklist

System architecture

A solution's architecture determines its functionality, efficiency, and long-term success. A strong system architecture will align with your existing infrastructure, enhance workflow, prioritize security and compliance, and provide a foundation for future growth and innovation.

Is compliance automatically embedded in the proposal?

Compliance shouldn't be an afterthought. Ensuring proposals have the right classification and comply with relevant legal requirements is crucial. Can disclaimers be added automatically to proposals?

Do the proposal templates integrate with your current systems?

Can end users open proposal templates in Microsoft Office or Google Workspace, and export to applications like Salesforce, DocuSign, and SharePoint?

Is the solution easy to use?

To ensure adoption, the software should be effortlessly navigable, responsive, and boast a robust UX for both administrators and consultants. Admins should seamlessly manage the solution and upload content in real time, without the need for vendor assistance, for optimal efficiency.

Does the solution offer strong integration capabilities?

The platform must seamlessly integrate data from various sources, both internally (populating proposals) and externally (sharing proposals). It's crucial that the platform can integrate with any relevant systems, both now and in the future.

Can the solution support multiple use cases?

Not all proposals will require the same level of automation. While some documents can be fully automated, others will require significant end-user input. Your solution needs to be flexible enough to support diverse internal use cases.

End-user capabilities

Guarantee a high level of end-user adoption by providing consultants with the tools to effortlessly create quality proposals that align with company standards. Automation plays a pivotal role in this process, saving time and enhancing the quality by eliminating the need for manual content creation and editing.

How easy is it for consultants to use the software?

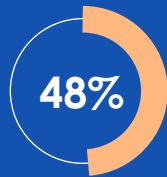
Proposal automation software should be easy for consultants to use intuitively, without the need for extensive training. Make sure to test the user experience as part of your demo.

Is the user experience unified across applications?

The solution should provide a seamless user experience across all document applications (both on-premises and web). Additionally, it's crucial to ensure a single point of access for users to aggregate content from various sources like DAM and repositories (e.g. SharePoint).

Choosing a vendor: The checklist

Why is security so important?



Companies without ISO 27001 certifications are **48%** more likely to experience a data breach compared to certified organizations.

2.5x

Businesses using vendors without SOC II compliance face an average of **2.5x higher** financial losses in the event of a security incident.

Does the solution allow for proposal customization?

Consultants should have the ability to make manual adjustment to the proposal document post assembly. The solution should provide robust post-production capabilities, allowing consultants to personalize the document in Word or PowerPoint.

Can the solution handle variable output formats?

The output of the proposal can vary depending on the recipient and the use case. Whether it starts in Word or PowerPoint, the solution should allow output in PDF, SharePoint, Salesforce, or any necessary format.

How does AI enhance productivity securely?

AI can provide significant productivity gains throughout the proposal pipeline. Prioritize security with enterprise-grade standards to avoid saving prompts or outputs for data privacy. Centralized management ensures control over AI inputs, outputs, prompts, and tone of voice.

Security & data

In the digital age, security is non-negotiable. Any risks could significantly impact the entire company. Here are some core questions to consider when evaluating your software provider.

Does the platform take a security-first approach?

Choose a solution from a company where security is integral. Seek certifications like SOC II and ISO 27001. You can connect with their CISO during the buying process to understand how they manage data.

Does the solution ensure maximum data integrity?

Dealing with sensitive data in proposal creation requires a provider with best-practice security controls. They should ensure no data leakage during document creation. Check data hosting details, and if the company supports just-in-time provisioning with Azure AD (OpenID Connect), SAML2, and ADFS.

Choosing a vendor: The checklist

Implementation, support & training

Implementation shouldn't be a headache. Seamless onboarding, robust support, and comprehensive training are the keys to success.

Is the solution easy to implement?

It's important that the implementation process is as easy and fast as possible. This will ensure that you are able to derive value from the solution quickly and maintain the momentum from the employees for the new solution.

Does the company provide good support and training?

Ensure that your organization and employees have strong training and support throughout the contract period. This is vital to ensure that any potential bugs are dealt with swiftly and that your team has a thorough understanding of how to use the solution.

How high is the adoption rate?

High adoption rates are crucial for any software purchase. Ensure your employees actively use the purchased proposal automation software to avoid it becoming stagnant. Key indicators include its integration into existing workflows and its intuitive user experience.

Partnerships

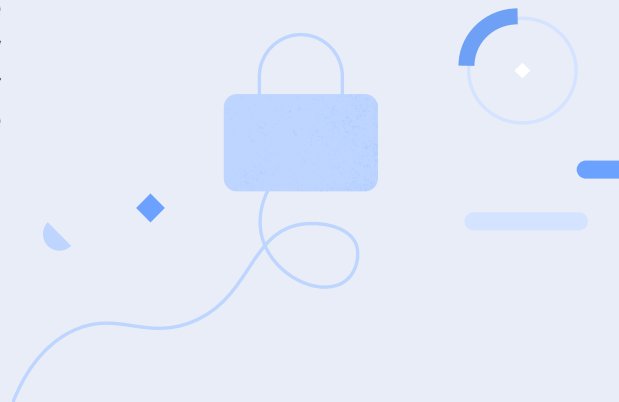
A solution is only as strong as its ecosystem. Ensure the company you're buying from is and may come with additional financial benefits.

Microsoft Azure Consumption Commitment (MACC) agreement

If you are a company with a MACC agreement, you should seek out companies that are MACC eligible and transactable. As the MACC agreement is an upfront commitment, you will be charged regardless if you hit the commitment or not. MACC customers are therefore highly incentivized to decrement it.

A strong network of solution partners

You want to look for a solution that fits your needs. However, most solutions will require customization. The provider should be used to working with external solution partners and be able to point to a strong track record of working on proposal automation projects.



How to automate a proposal with Templafy

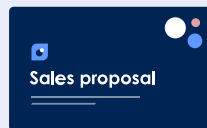
Most consulting companies we work with struggle to manage their proposals. They often have hundreds, if not thousands, of variations depending on the customer, the industry, and the service they are selling.

Here's an example of how Templafy's automation capabilities can create a 30-page proposal in minutes.

Some sections of a proposal can be fully automated. Others, that require more end user input, benefit from a dynamic template that consultants can input into. All the while, Templafy ensures sections

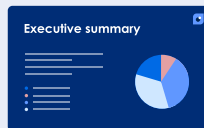
are correctly sequenced, to form a compelling storyline.

As part of the automatic proposal creation, all company and client details, such as name, logos, titles, contact info, and legal disclaimers, are added to the document instantly.



Cover Page

A customized cover page generated based on the specific use case.



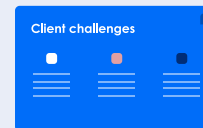
Executive Summary

A concise 1 to 2-page summary.



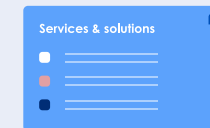
Table of Contents

A comprehensive guide to the document's structure.



Context

Slides that are tailored to your client's challenges.



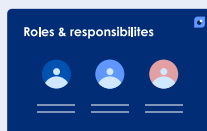
Services & Solutions

Incorporate the right services based on the client and use case.



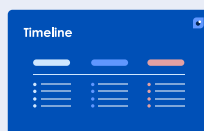
Scope of Work

Generate slides outlining the project's purpose and work details.



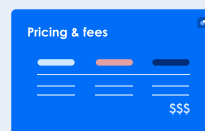
Roles & Responsibilities

Outline roles and responsibilities to promote accountability.



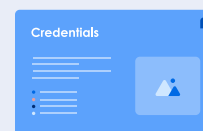
Timeline & Progress

Automatically integrate project timelines and criteria for measuring progress.



Pricing and Fees

Automatically pull in accurate terms and conditions from the CRM system.



Credentials

Effortlessly integrate 2 to 3 relevant case studies for the specific use case and client.



Team CVs

Automatically pull in CVs for the relevant consultants working on the project.

Proposal time savings with Templafy

Area	Item	Without Templafy		With Templafy	
		Process	Est time	Process	Est time
Proposal Template Information					
Proposal Template	Approved PowerPoint template	In one of the following place: Locally saved, SharePoint folder, Old Emails	30 minutes	Automatically chosen as part of proposal creation	30 seconds
Proposal Template	Corporate logo & colors, other brand graphic elements	Review old proposals, reach out to marketing, search the internet	15 minutes	Automatically chosen as part of proposal creation	30 seconds
Proposal Template	Thematic photos & artwork for specific industries or client types	Review old proposals, reach out to marketing, search the internet	2 hours	Automatically chosen as part of proposal creation	30 seconds
Company Information					
Company Information	Contact information and disclaimers	Copy old presentation or manually add into the proposal	30 minutes	Automatically insert based on centrally controlled information	30 seconds
Client Information					
Client Information	Add in client details across the document	Manually go through and insert client name and logo throughout the presentation	30 minutes	Automatically insert logo and name throughout the presentation	30 seconds
Services and solutions					
Services	Automatically pull in the right services based on the client and use case	Review old proposals and copy in services. Make manual adjustments to the copy.	2 hours	Select the services and automatically pull them into the proposal based on the use case	15 minutes
Solution	Pull in the right solution descriptions based on the customer	Review old proposals and copy in solutions. Make manual adjustments to the copy.	2 hours	Select the solutions and automatically pull them into the proposal based on the use case	30 seconds
SOW (Statement of Work)					
Project description	Create project description based on the specific use case	Review old proposals and copy in description. Make manual adjustments to the copy	2 hours	Automatically pull in pre-approved project descriptions and make final edits	15 minutes
Roles & responsibilities	Outlining roles and responsibilities for the project	Re-use old slides with and overview of roles and responsibilities. Manually make changes	1 hour	Automatically pull in roles and responsibilities based on the project and the use case	15 minutes

Proposal time savings with Templafy

Area	Item	Without Templafy		With Templafy	
		Process	Est time	Process	Est time
Pricing & fees					
Pricing	Ensure that the correct pricing and fee structure is used	Re-use pricing and fee section from previous proposal. Manual correct pricing and fees data.	1 hour	Automatically pull in pricing from your CRM system	5 minutes
Terms & Conditions	Apply the correct terms and conditions to the pricing and fees	Re-use terms and conditions from old proposal	30 minutes	Automatically pull in correct terms and conditions	30 seconds
Credentials					
Case studies	Pull in relevant case studies	Find old proposals and copy in case studies	30 minutes	Pull in relevant case studies based on the industry and the use case	30 seconds
Team CVs					
CVs	Automatically pull in CVs for the relevant consultants	Find old proposals and copy CVs or write them manually	1 hour	Connect to database with CVs and pull in the correct CVs based on the consultant	30 seconds
Services	Automatically pull in the photos of the consultants	Find photos in old proposals or search online for photos	30 minutes	Connect to the DAM system and pull in correct photos	30 seconds

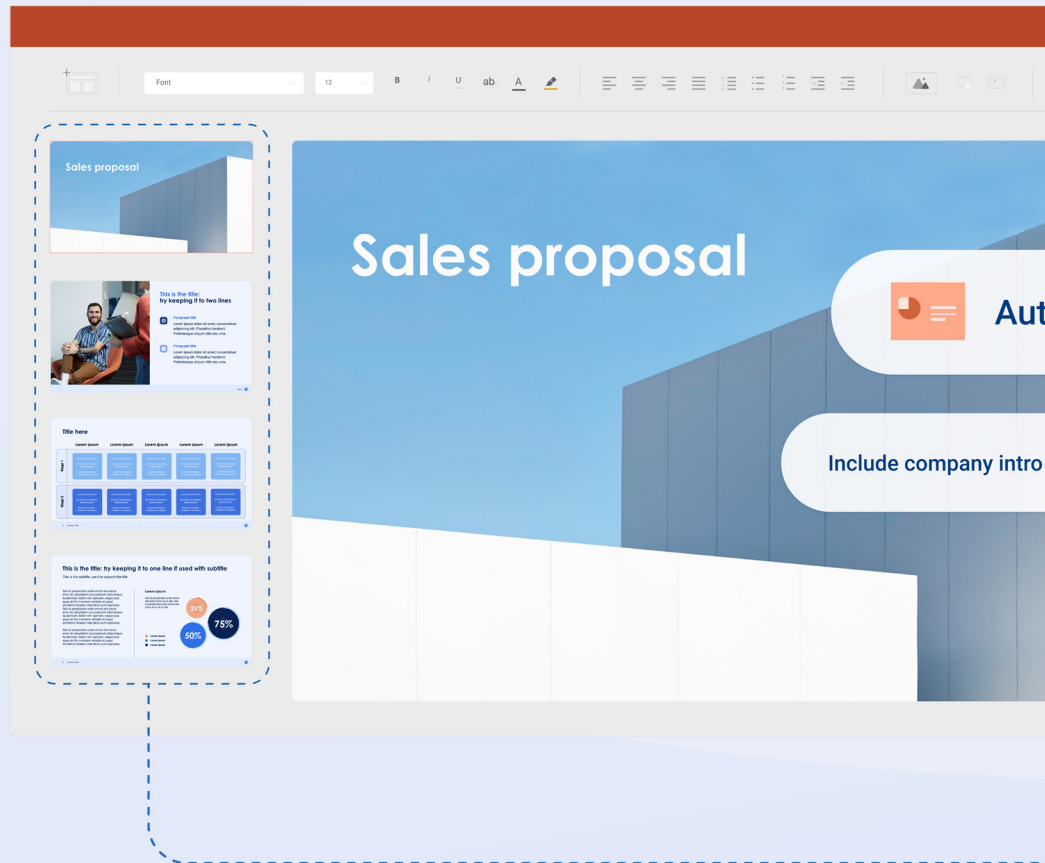
It's time to power up your proposals

As the market leader in proposal automation software, Templafy is already supporting hundreds of thousands of users across consulting companies, including three of "the big four" consulting firms, to create better proposals, faster.

Proposal automation helps to ensure that the assembly of every proposal is frictionless for the employee, while guaranteeing to the admin or director that all the information in it is correct and up to date.

Ready to elevate efficiency, enhance security, and empower your workforce across every proposal?

[Book Demo](#)



Sales proposal

11 questions - 6 required left *

Effective date *

13 March 2021

Company name *

Demo

Originating firm

Client name

John Doe

Proposal title *

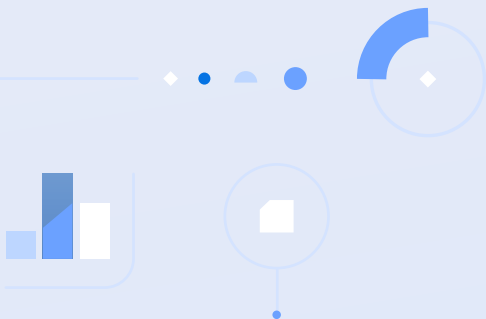
Proposal for Demo

Subtitle

2021 - Q1

Introduction *

Other actions [Next](#)





Elimate manual document work