



BPC

NEW ORLEANS



June 2nd - 5th, 2024



New Orleans, US



New Research

How Proposal Teams Are *Really* Using AI

Today's Speaker

- ✕ Bid Manager
- ✕ Proposal Writer
- ✕ Capture Planner



Dr. Aida Rahim
Sr. Data Scientist
Loopio

Today's Speaker



I Am a Data
Scientist, with a PhD
from MIT



Dr. Aida Rahim
Sr. Data Scientist
Loopio



15 Years

Working in
Data Processing

15 Years

Working in
Data Analysis

15 Years

Working in
Data Modelling

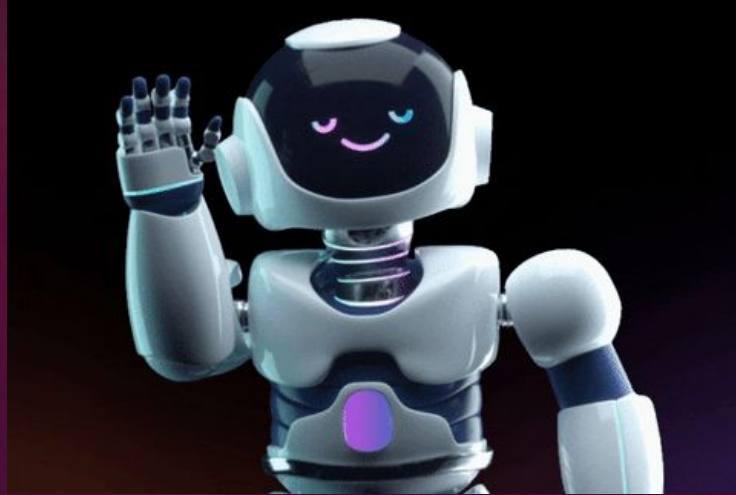


Today

Work at Loopio as a
Sr. Data Scientist

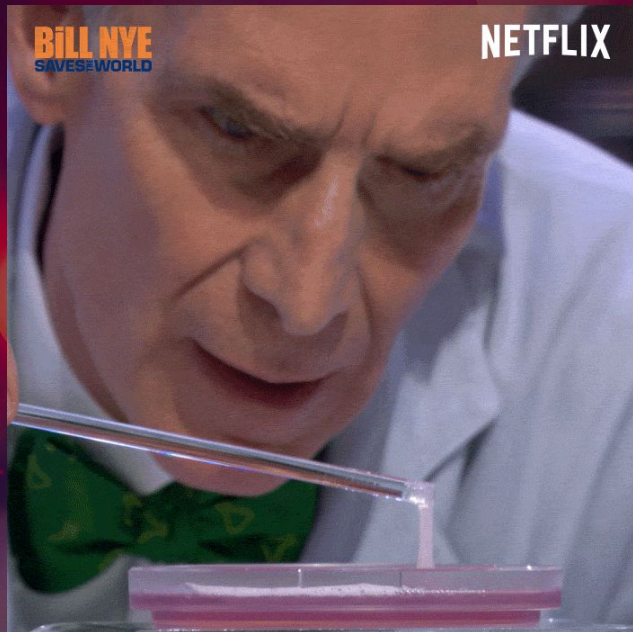


Working with different
language models



Over the past year, I've been
focused on **generative AI**

Which means I spend my days...



- **Designing** new prompts
- **Evals** - test the results
- **Metrics scrutinizing** generated outputs for relevance, accuracy, tone, word count, language, and more

...And weighing feedback



- Customers who are **excited** about using it
- Customers who are **concerned** about using it
- And those who **sit in the middle** (following along for new developments)

Agenda for Today

1. Adoption of AI in Proposal Management
2. My POV as a Data Scientist
3. New Advancements & Innovations
4. Q&A

Adoption of AI In Proposal Management

Insights from
1650+ teams
who respond
to RFPs

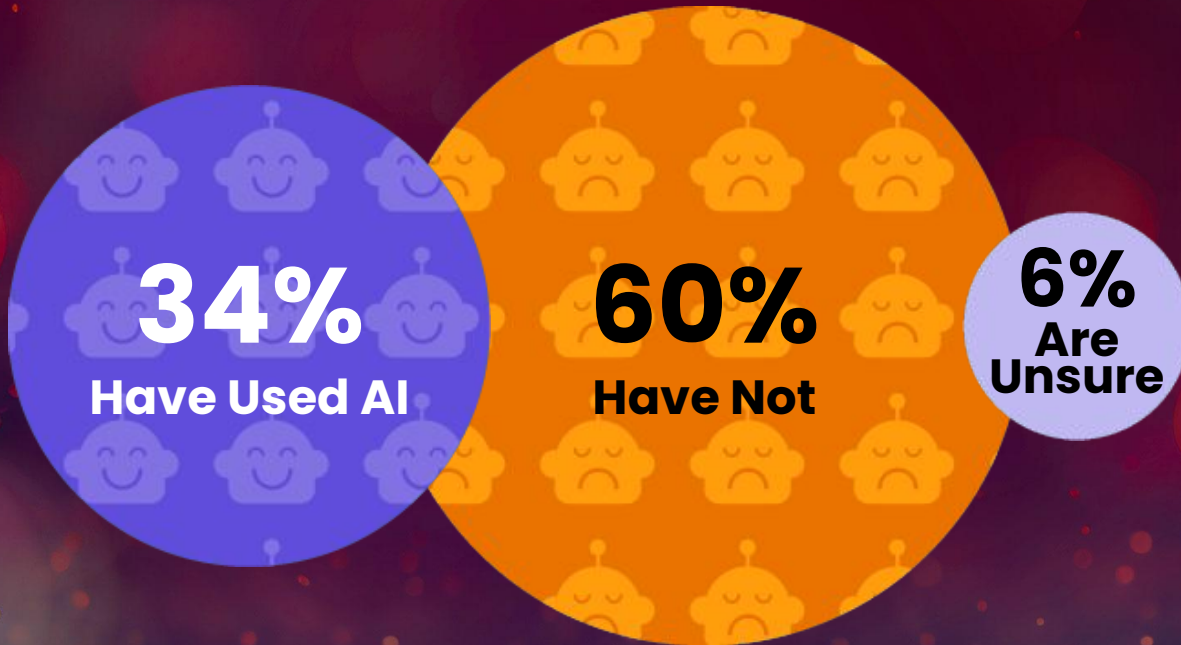


The 2024 Report Asked

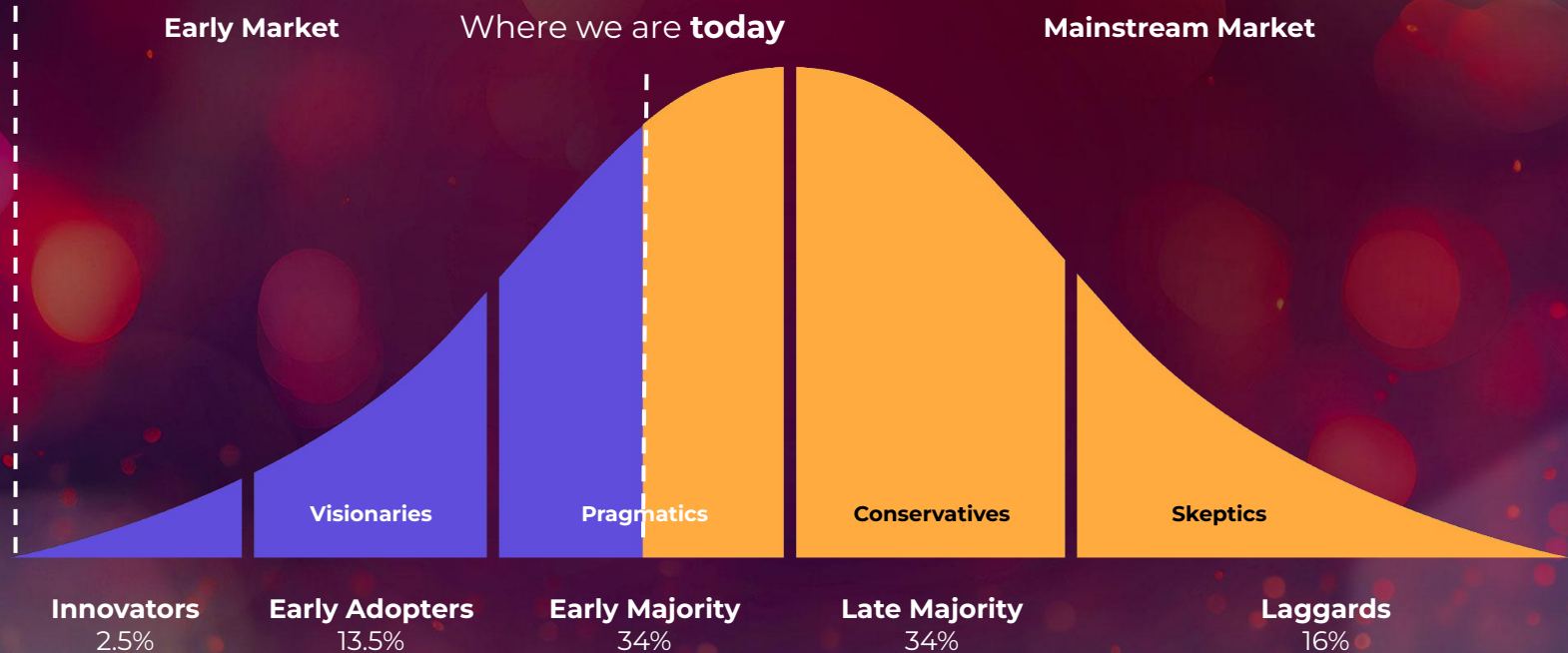


- **Have** you used AI in your RFP process in the last 12 months?
- **How** are you using it?
- How would you **like** to be using it?

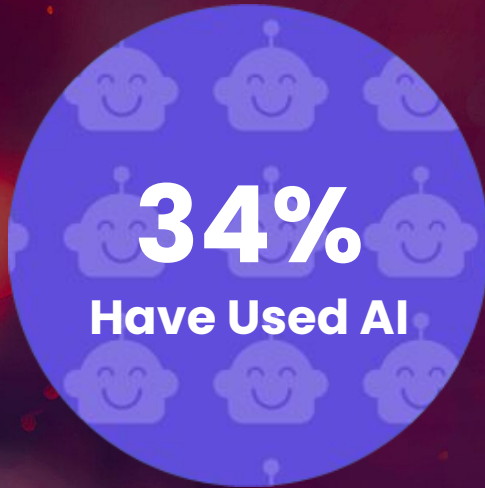
In the past 12 months, **have you used generative AI** as part of your RFP response process?



Innovation Adoption Curve



There's Different Degrees of 'Using'



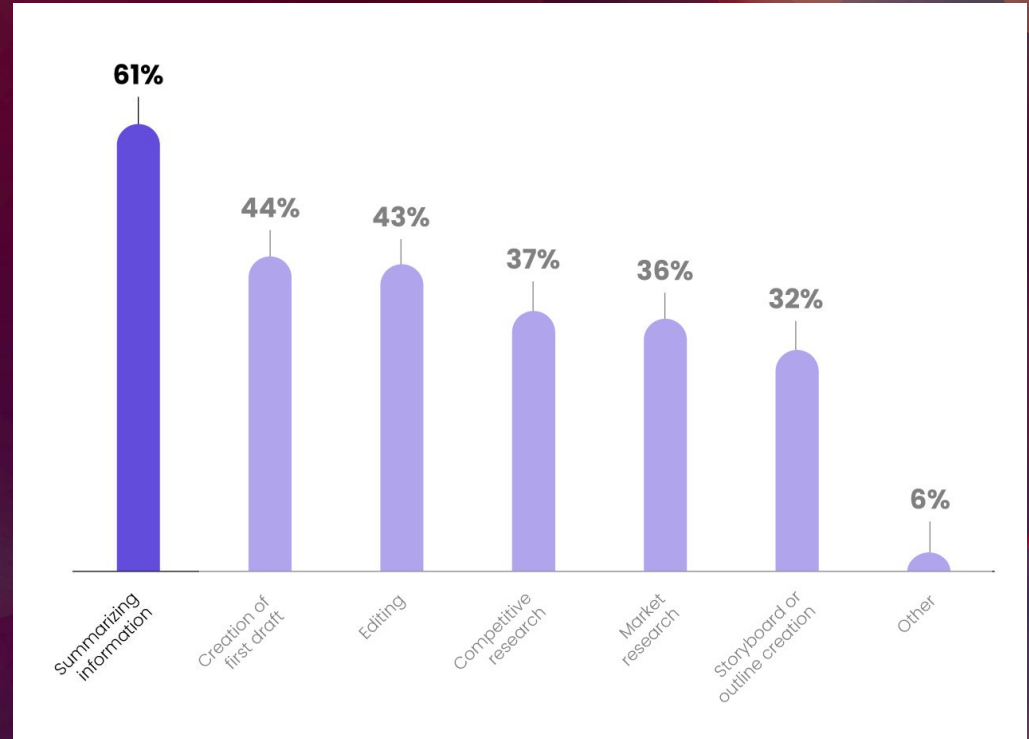
'Using' AI is not static, it will continue to **advance** and **evolve** with us over time (as well our **comfort** levels)

The Reality is:

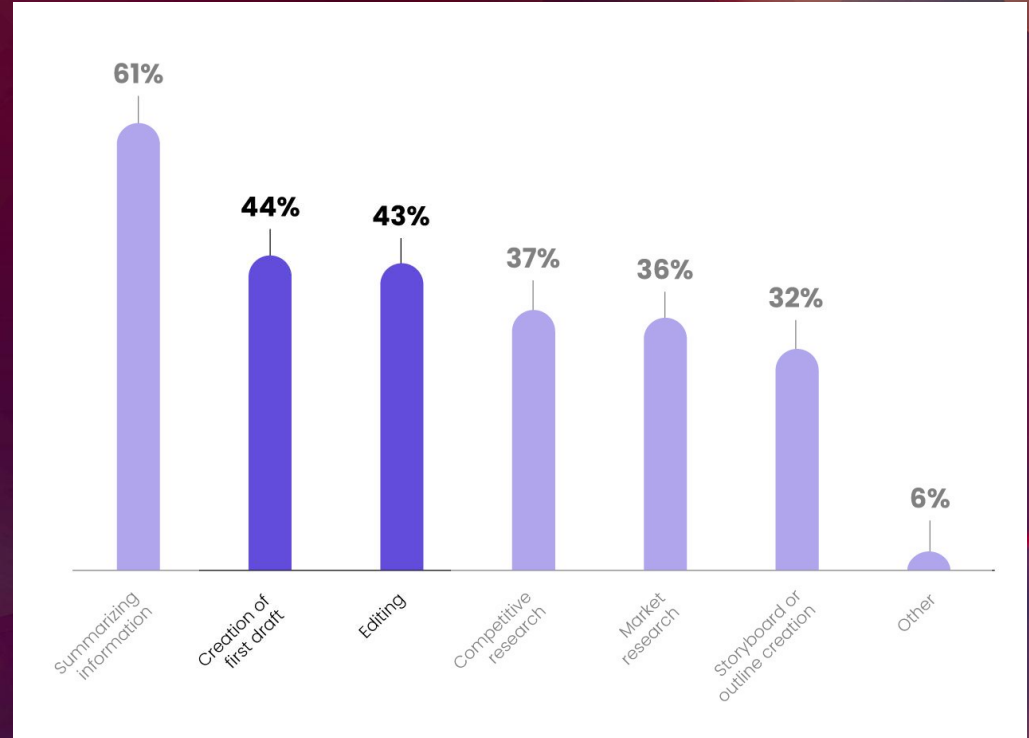
**As AI Evolves on the Application Side,
It Also Evolves on the User Side**

How Are Early Adopters Using AI for Proposals Today?

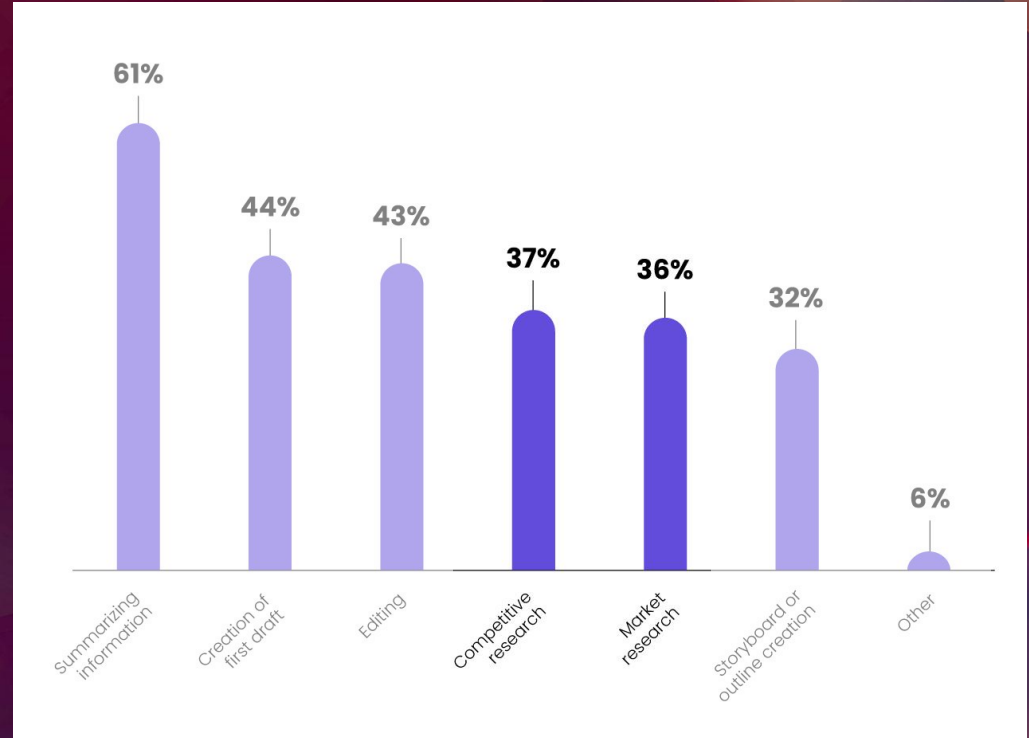
61% of Early Adopters Use AI for Summarizing Information



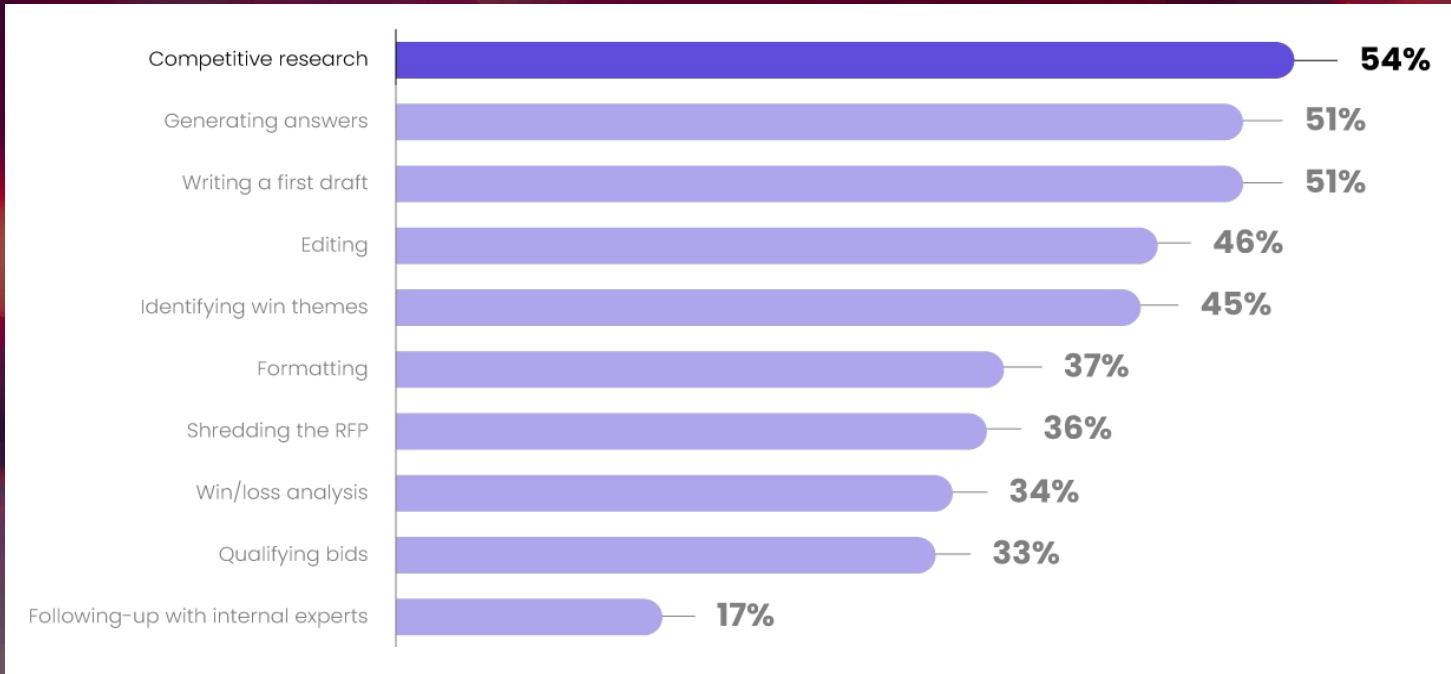
Creation of a **First Draft & Editing** Aren't Far Behind



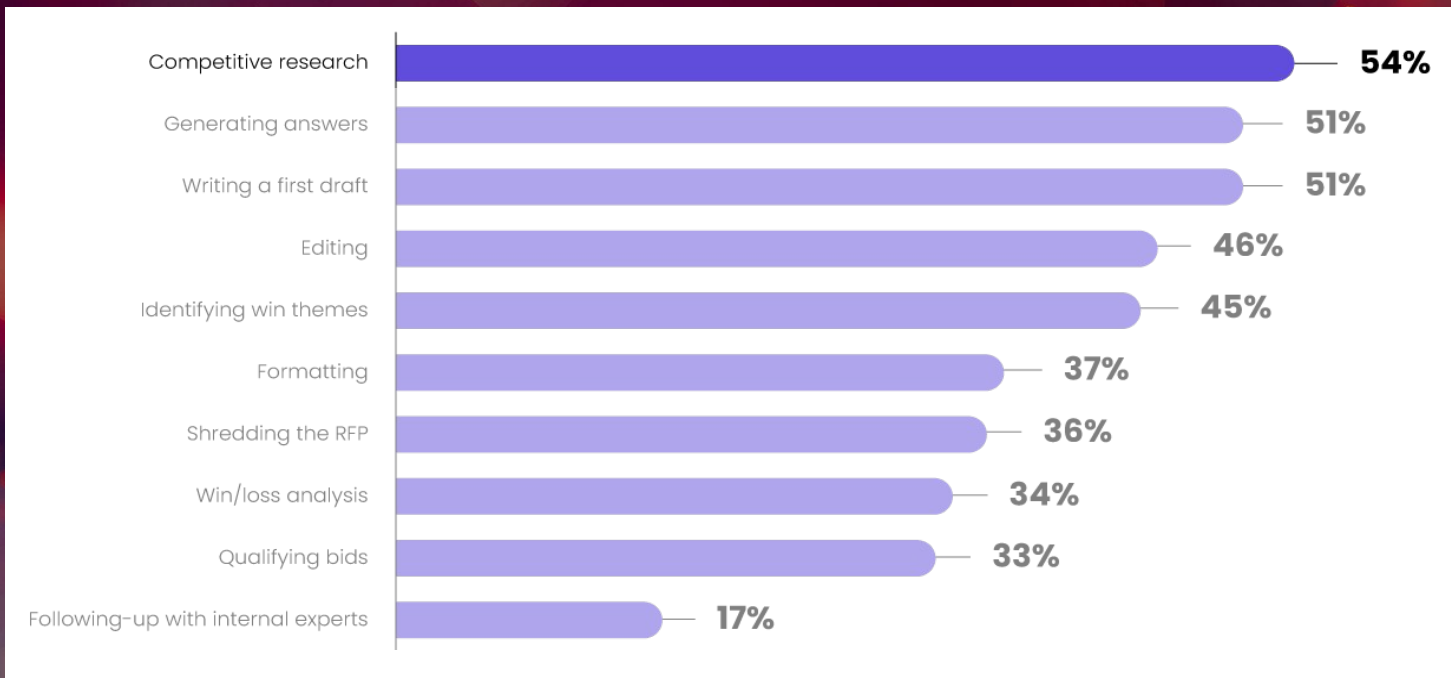
Competitive & Market Research Are Among the Least Popular Uses (Today...)



What parts of the response process would you consider using AI for?



54% of All Participants Said Competitive Research



What Else Are You Considering AI for?

**“Creating
CVs.”**

—Proposal Writer

**“Pricing and
schedule
preparation.”**

—Marketing Leader

**“Review of
response
against
scope.”**

—Content Manager

...But There is Still Hesitancy

“So far we have been forbidden from pursuing any AI usages.”

—Proposal Manager

“USA boss won’t let us.”

—Proposal Manager

“Not familiar enough with AI to answer at this time.”

—Proposal Manager

The Current State of AI Adoption



Majority are Interested, But
Not Invested in
Using (Yet)



Value in quickly
getting support
for **modifying**
content



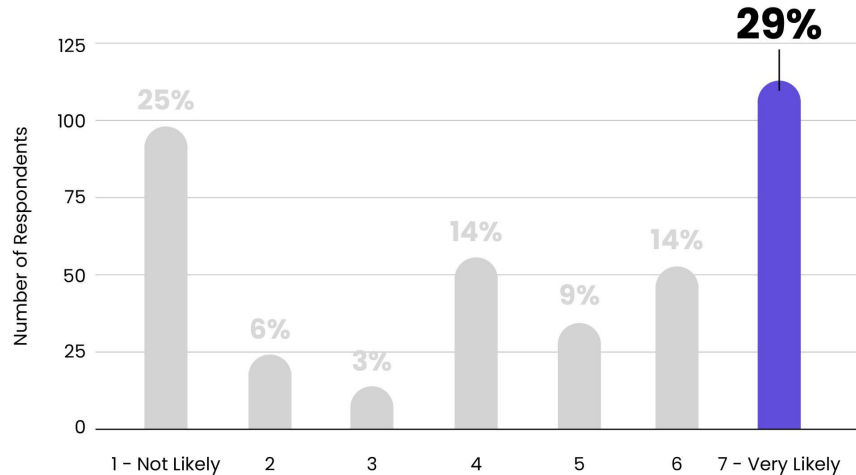
Still **Hesitancy**
Around Using
Proprietary Info

My POV

As a Data Scientist

What I'm Seeing

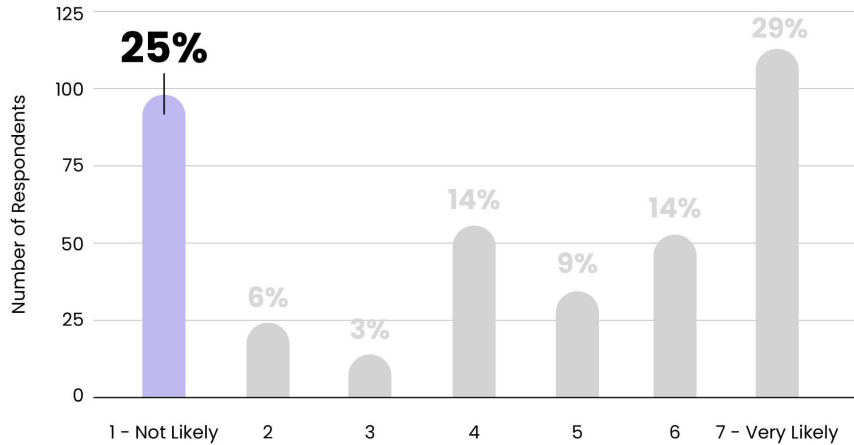
How Likely Are You to Use Generative AI to Respond to an RFP?



Some are *very* interested.

What I'm Seeing

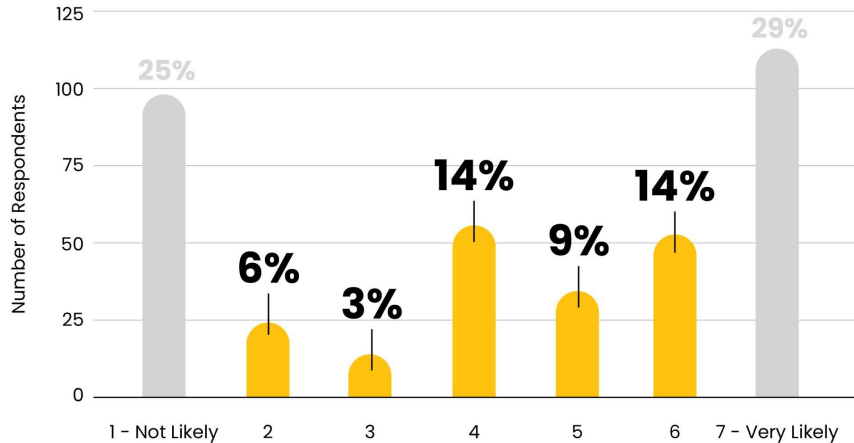
How Likely Are You to Use Generative AI to Respond to an RFP?



Some are
against using it.

What I'm Seeing

How Likely Are You to Use Generative AI to Respond to an RFP?



But many sit in the *undecided* middle.

It's *Normal* to be Hesitant at First



Questions we all have:

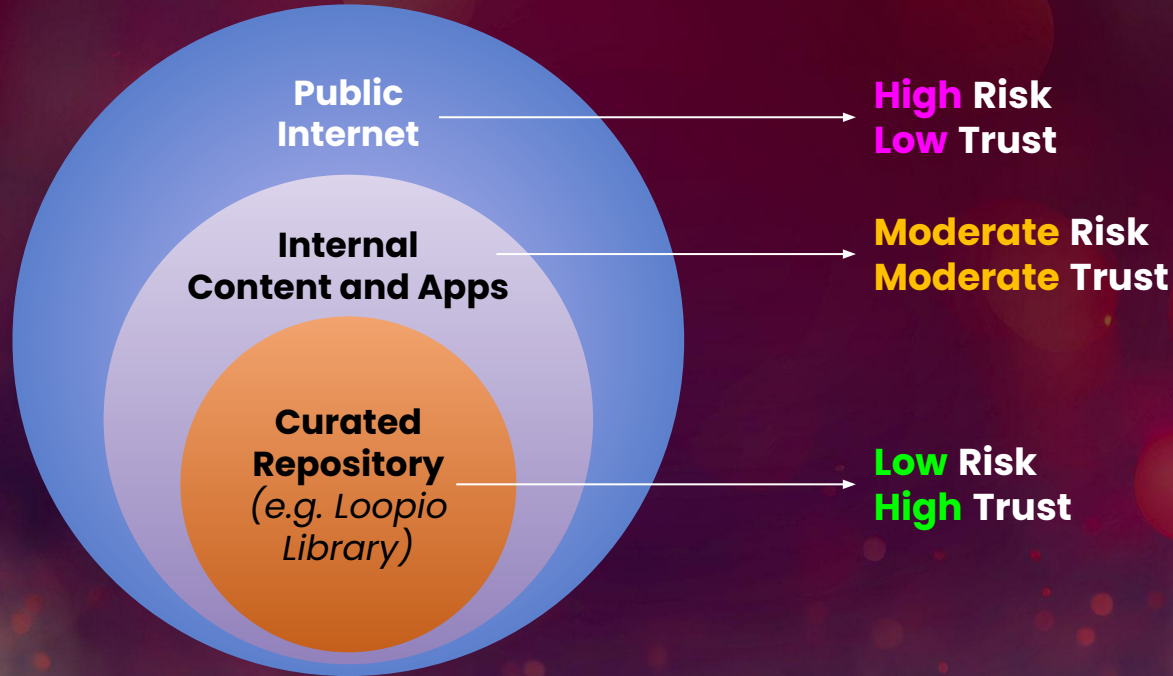
- How do I use it?
- How do I maintain it?
- How do I monitor it?
- How do I use it effectively?

5 Core Questions We Hear



1. Is it **safe**?
2. Is it **reliable**?
3. Is it **secure**?
4. Is it **trustworthy**?
5. Is it **scalable**?

Information Sources for Generative AI





470+ Customers Using Gen AI Features



*“Loving the new features.
It’s pretty spot on in how it’s
**responding to multi-layered
questions.”***



*“So far we have been **forbidden**
from pursuing any AI usages”*

AI Guiding Principles

**Trust &
Security**

**Humans in
the Loop**

**Selective &
Intentional**

New Advancements & Innovations

New Developments I'm Currently Working On



Advanced prompts to match brand **voice & tone**



Generate answers in **bulk**




Providing **Citations**
For sources

Smart Compose

Quickly generate answers with...

- **Tailored length:** use Gen AI to turn your best content into a customized response for a specific RFX, based on specific preferences.
- **Unique voice and tone:** Specifying 'professional', 'direct', or more.
- **Specific instructions, unique to your business** and company's preferences for word choice or writing style

2.1 Please describe your company's Information Security Policy that embodies the Information Security concepts of Confidentiality, Integrity and Availability. ✕

 Generate an Answer

Edit Question only for Generating an Answer ⓘ
Please describe your company's Information Security Policy that embodies the Information Security concepts of Confidentiality, Integrity and Availability.
Changes here will not affect the question in the document.

Information Sources
Library Locations

Use all library locations, or choose... ▼

Writing Preferences

Length ⓘ

- ☒ Short answer ⓘ
- ☐ Long answer ⓘ
- ☐ Character Limit ⓘ

Tone of Voice ⓘ

- ☒ Unspecified ⓘ
- ☐ Professional ⓘ
- ☐ Conversational ⓘ
- ☐ Direct ⓘ
- ☐ Enthusiastic ⓘ
- ☐ Other

Additional Instructions ⓘAdd some additional tasks for Generative AI like "write answers in UK English", Maximum of 4000 characters.

Cancel

Generate Answer

SNEAK PEEK

Generate Answers in Bulk

Rapidly respond to entire questionnaires

- **Generate from Your Best Content:** turn existing knowledge into personalized responses by generating answers with AI.
- **AI + Your Entire RFX:** apply the best of Generative AI with ease to your entire questionnaire in a few clicks.
- **Meet, and Beat, Your Deadlines:** automate even more of your questionnaire responses and submit on time, every time.



×

Generate an answer

ⓘ

In order to create responses, Generative AI relies on information from the library. Please always assess generated responses for accuracy and relevancy.

Options

Length ⓘ
☒ Short Answer ⓘ ☐ Long Answer ⓘ

Library Location ⓘ

Search or browse your Library

Cancel

Generate Answer



1 Entry Selected ▾

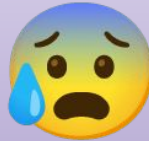
 Run Magic

Clear Magic

Key Takeaways



Primary use is summarizing and drafting, but there's **bigger desire for competitive research.**



Concern around sharing proprietary information still a blocker to widespread adoption.



New innovations will help proposal pros **generate answers using a secure and closed system.**



Q&A



*We Welcome
Your Feedback*

Grab Your Copy of the RFP Trends & Benchmarks Report



loopio.com/trends-report