

# Proposal Content Management

## 5 Best Practices for Enterprises



When is the last time your RFP process went smoothly? No scramble to meet a deadline, no last minute cut and pasting of old content, no wasting time gathering documents from multiple sources and trying to squeeze them into some format?

We know. It hardly ever goes smoothly.

But the fact is, whether you use proposal management software or have a manual process, there's nothing more important than having your content up to date and readily accessible. This ensures not only the quality of your proposals and RFP responses, but the timeliness of those responses.

The good news is that a sound content management strategy doesn't have to be difficult. It does require planning, organization and dedication to a consistent process. And you don't have to go it alone!

We've identified 5 Best Practices for your Content Management Process to help you create a foundation for Proposal Success.

### 1. Identify Required Content

This seems like a no-brainer at first glance, but amazingly, many companies have very little idea what content is useful, where it is located, and the last time it was updated.

And no – just utilizing content from the last RFP you did is not “identifying your content.” You will need to conduct a review of all your existing content.

Determine all the necessary RFP documentation in your organization, for example:

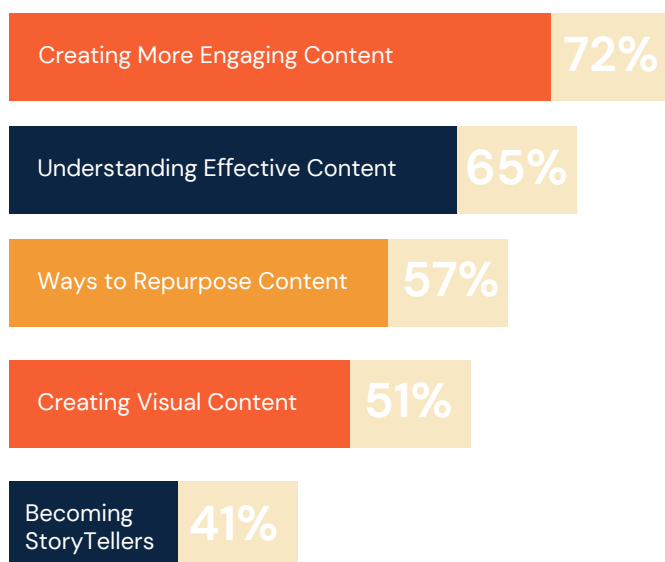
- Standard Q&As
- Policies, procedures, org. charts
- Marketing materials, project documents
- Then, identify the source of the collateral and determine:

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- Which department it lies in (Marketing? Product? Legal?)
- Where it is physically stored (Hard Drive? Intranet?)
- How often it is updated?
- Who updates or validates the data?

By identifying and sourcing your content, you gain a better understanding of the resources you already have at your disposal – and more importantly, the information you don't have that you need to either create or source and incorporate into your content library before your next RFP is due. Involving departments from across your company will take some effort, but can also help you identify good content and source you didn't know you had.

### Top Five Priorities Content Creators Plan to Focus On



–Content Marketing Institute

## 2. Categorize Your Content

Once you have identified your content, you need to decide on the best system to categorize it for easy retrieval. For example, will you store it all in a folder structure on your internal database with categories everyone can agree on? Or do you have a sales proposal response or RFP management system where you can store your data?

In a digital dependent world, where information is king, the need to preserve data in a secure and “non-biodegradable” way is of paramount importance.

–Entrepreneur

When categorizing content, it is helpful to define your categories based on sections in typical RFPs, such as:

- Company information
- Products, services or strategies
- Financial information
- Legal information
- Content expert information

Make sure to collaborate on categories with your team, and keep it simple: 10 –15 main categories with no more than 25 sub-categories will eliminate confusion and streamline your storage and retrieval process.

You also need to consider your storage options – do you have a central location for everyone to access, update and share content securely and efficiently? Whether it's a cloud-based proposal

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management solution, company intranet or RFP management software, make sure you have a system that allows access to everyone while protecting your data.

### 3. Manage the Content

This can be the most challenging – and one of the most important things you can do to ensure all of your content is relevant, timely and accurate.

A great place to start is to appoint a content manager or content committee to maintain the quality and consistency of all of your valuable business data. This person or team of people can ensure the consistency and quality of your content by:

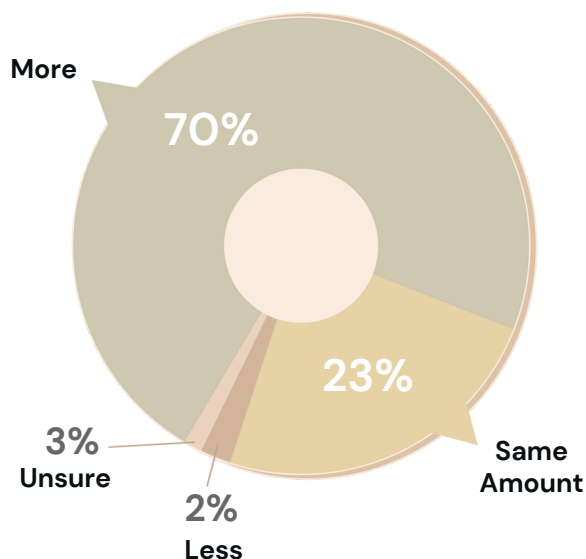
- Scheduling regular content reviews
- Eliminating redundant and expired content
- Archiving content you want to keep but not utilize
- Storing and updating standard RFP responses
- Consolidating information where possible

By appointing a team and a process to your content management, you ensure that each time you respond to an RFP the data is accurate.

Subject matter experts who understand and help guide the sales process drive growth in top performing B2B companies.

–Forbes

Expected Change in B2B Content Creation



--Content Marketing Institute

It also allows your company to weed through old, expired content and create a safe space for it to remain archived – whether on or off site. A team approach often works best as each department has a say as to what is critical to their segment of the business, and can be a good starting point for the creation of new material.

### 4. Build Content Expert Relationships

Often your best product, marketing, service or technical information resides in departments, offices or specific locations depending on who has ownership of it. Establishing subject matter experts (SMEs) is the best way to make sure you get the right person providing you the right content.

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Analyze RFPs you've received to determine the type of information you'll need most often, and then identify the appropriate authorities on each topic. Ideally, you'll want at least one main SME as well as a back-up for each area. Once you have your SMEs in place, make sure to:

- Educate them on the proposal process
- Work with them to schedule regular content reviews
- Get buy-in from senior management
- Let them know you appreciate their cooperation

When you organize your content ahead of time, it helps ensure that you engage the correct SME for new responses or reviews of standard content, and that all relevant content is included in the appropriate review cycles. Getting buy-in from senior management is critical when you are working with people who have other jobs to do besides update content! Respecting their time and contributions can help them feel appreciated and less stressed about any extra work that needs to be done.

Personalization is the name of the sales game today. Rather than presenting a canned pitch to each and every prospect, sales organizations should be carefully customizing every detail for the potential client's needs. A lackluster response here is a gigantic red flag.

–Hubspot

Brands spend 25%–43% of their marketing budget on content, yet only 23% of CMOs feel they are producing the right information for the right audience, and delivering it at the right time and in the correct format.

–Business2Community

### 5. Conduct Regular Proposal Postmortems

Whether you win or lose, whenever you have a completed RFP questionnaire, there are lessons to be learned. Make sure to review it so you can:

- Identify new & approved content
- Add any new content to your library
- Update existing content with changes

Assign responsibility for this review to the Content Manager or team, and take immediate action! You may have new content that will need to be utilized immediately. Once you let it slip, you fall back into the same old bad habits.

Often when you win a proposal, the new client can provide helpful feedback on your response that can guide future responses. Perhaps your creativity, a detailed product or service explanation or graphic, or the way your financials were presented made an impression. Find out where you excel and where you need to make some changes.

## Proposal Content Management: 5 Best Practices for Enterprises

### Foundation for Success

Make a commitment to be better prepared. Managing your proposal content processes is critical to helping reduce the stress associated with the tedious and time-consuming tasks involved. Streamline your RFP process by organizing and categorizing your content, keeping it up to date and automating the process as much as possible. By organizing your content process proactively, you can improve turnaround times, and free your team to focus on developing, sharing and maintaining winning RFP content consistently, to help you get more business.

- Create a formal proposal content management workflow process document
- Share the process with all key stakeholders
- Establish & maintain relationships
- Employ a dedicated Content Manager or establish a Content Committee
- Set a schedule and stick with it
- Get senior management buy-in

If your company uses a proposal software platform for content management and workflow, you may already have some tools to help you keep these content updates on track. RocketDocs includes tools that help with categorization, identification of appropriate SMEs, content expiration notifications, seamless distribution of content for updates, and re-link and word replacement functions to update content narrowly or universally, just to name a few.

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To find out if RocketDocs has the features, benefits, support and pricing your business needs for creating and maintaining winning RFP content, request a free, personal demonstration.

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