Where Content is King

— OPTIMIZING YOUR RFP RESPONSES

Proper content management is a constant battle that we can help you win.

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25+ Years of Proposal Content Management

It's no wonder that in 2016, RocketDocs, then called Proposal Software, Inc., won an APMP award for highest attendance on record with over 1000 participants for a three-part presentation delivered on content management best practices. This presentation was wildly popular because companies, no matter the industry, know that poor content management cripples productivity and stalls any forward momentum. That's why we're revisiting and sharing Best Practices for Proposal Content Management with you.

Foundation for Success

Within every seamless process lies a foundation that solidifies success. There are steps, key techniques, and best practices that really do make a difference in building a meaningful process and positive outcome.

01 Create a formal proposal content management workflow process document

02 Share the process with all key stakeholders

03 Establish and maintain relationships

04 Employ a dedicated Content Manager or establish a Content Committee

05 Set a schedule and stick with it

06 Get Senior Management buy-in

IDENTIFY REQUIRED CONTENT

Identifying sources of required content is a major step. Determine all the necessary RFP documentation including the standard Q&A's, policies, procedures, org charts, marketing materials, and any other miscellaneous items that you recognize.

Additionally, identify the sources of the collateral. This includes:

- Where – department, system etc.
- When – how often is it updated
- Who – the person validating the data

CATEGORIZE CONTENT

Once you've identified the content, you will need to categorize it. So, establish a system, whether that is a database, folders, Word or Excel. Then, categorize by standard areas of focus. The outline or table of contents of your typical Request for Information ("RFI") is a good place to start with topics such as company information, product details, security, risk management, etc. Don't be afraid to collaborate on those categories, but keep it simple with only 10-15 main categories, and approximately 25 sub-categories.

MANAGE THE CONTENT

It's important to have your go-to person who knows the proposal content management workflow inside and out and knows the content like the back of their hand. This is where the content manager or content committee really steps in and ensures consistency and quality of the content. They should conduct content reviews regularly and determine if they should archive certain content. Standard responses should be stored, and every effort to reduce redundancies should be made by consolidating where possible and assigning similar questions with the same response.

BUILD CONTENT EXPERT RELATIONSHIPS

Confirm the stakeholders or content experts and educate them on the proposal process. Set realistic review schedules and communicate often. Deadlines are crucial to any efficient machine, so set a schedule, and stick with it. Be diligent about following that schedule and staying on task. After that, make sure you have senior management buy-in, because in reality, without senior management buy-in, your workflow process won't get very far. You need decision makers who will back you and support your strategy.

CONDUCT REGULAR PROPOSAL POSTMORTEMS

This responsibility could either belong to the content manager or be a group effort, but regardless, it is an essential step in the proposal content management process. Review all completed questionnaires and RFPS, being sure to identify new and approved content, add it to the content library, and update any existing content.

So in Summary....

- Create a workflow process
- Categorize content
- Keep it simple
- Establish responsibilities & build relationships
- Re-examine the final product