

knowledge | street

Client

InSys Consulting Services Inc.

Project

Proposal Process Improvement

Client Industry

IT Services

Summary

During a typical year, InSys needs to generate dozens of proposals, ranging from brief, letter-style documents to complex, multi-part responses. Like many companies, it had no defined process for doing so, relying instead on the expertise and reuse materials of individual employees. The COO wanted to tighten things up in this area, with the goal of reducing proposal generation time and improving the quality of the results.

The Need

InSys Consulting had a good story to tell.

It had been cited in the press for three years running as one of the fastest growing companies in its market space. It had a set of core values that management took seriously, and a vision of where it wanted to go. It had a terrific record of customer satisfaction, and a commitment to quality service.

However, when it was time to write a proposal, InSys had an old-fashioned approach: start with the last one written, and re-purpose it for the new opportunity. In all but the largest companies, that's

how proposals are usually put together, but it's an approach that has serious limitations.

One problem is that the story tends to decay, as bits of it are cut-and-pasted from different sources. The sense of the company as a real entity is lost, and the final document lacks a consistent human voice.

Another problem is the amount of time wasted in finding the right bits, and the risk of using outdated material that's not aligned with the current business.



Our Approach

We started this effort with a “Knowledge Mining” activity, collecting every proposal written in the previous two years. We read each one, cover to cover, and broke them down into small logical units. These units are known as “tiles,” and are the basic building blocks of proposal writing.

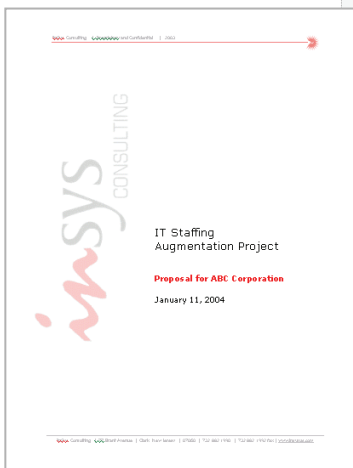
Most of the proposal activity at InSys involves responses to RFP documents. The contents and structure of the response are predetermined, and often follow a question & answer format. The tiles are essentially the answers to the most frequently asked questions, and can be assembled as necessary to generate a particular response. All the tiles are edited to ensure a consistent voice and tone, so they can be mixed and matched with confidence.

There are sometimes cases where an unsolicited proposal might be generated from scratch. For these situations, we developed a generic proposal outline, designed to tell the InSys story in a clear and concise way.

With the logical proposal building blocks established, we went on to design a style template, in Microsoft Word. The template ensures that InSys proposals have a professional, distinctive look, in line with the company’s web site and other marketing collateral.

Finally, K Street developed training and job aids to support the new proposal toolkit. We delivered the training to the client’s sales and administrative staff, scheduling it to coincide with an actual bid. We were able to assemble the response document in minutes, rather than hours: no searching through old documents or wandering the file servers.

Today, the InSys proposal process includes an additional final step. All new proposals are forwarded to Knowledge Street at the time of their submission. We review them for potential reuse artifacts, generate new tiles as appropriate and maintain the reuse library within the client’s environment. K Street is thus the remote steward of the InSys proposal Knowledge Base.



Client Quote

“Knowledge Street’s solution took the guess work out of RFP writing. Not only did the template give InSys a consistent, professional product, it also took the drudgery out of preparing the document.

We realized a substantial reduction in the time to delivery, as well as a more accurate and error free proposal. I consider the money spent with Knowledge Street to be among the best investments InSys has made in its brief history.”

Frank Sarnicola, Technical Director

