

AGILOFT PROPOSAL RESOURCE CENTER JUSTIFICATION & WORK PLAN

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AGILOFT PROPOSAL RESOURCE CENTER JUSTIFICATION & WORK PLAN

PURPOSE OF THIS WORK PLAN

The purpose of this work plan is to provide structure and organization around the design, implementation, and management of the Agiloft Proposal Center (APRC). It also provides an overview of the tasks and activities involved to successfully complete the APRC and achieve the project outcomes—a blueprint for a solid foundation.



INTRODUCTION AND BACKGROUND

Enhanced technology and shifting business infrastructure are ushering in a larger percentage of proposal professionals who are dispersed across physical spaces, time zones, languages, and cultures.

The virtual proposal environment is not just the latest fad; it is a wide-reaching movement. With the right virtual technologies in place, proposal teams can work effectively together without too many logistical issues—improving collaboration and increasing individual team productivity.

Before jumping full force into a virtual proposal setting it is important to identify and clarify your proposal development needs. Some of the challenges frequently faced by proposal teams (virtual or not) include:

- ▶ Content is dispersed in multiple locations making it time-consuming to find what you need.
- ▶ Documents are not easily accessible or searchable in the current location.
- ▶ Dedicated personnel will be needed to develop, update, and maintain content.
- ▶ Proposal documents (often having large file sizes) are distributed through e-mail to remote team members outside the company firewall.
- ▶ Current proposal environments have been reorganized multiple times, wasting valuable time and effort of company resources.
- ▶ The current organization and structure does not follow industry best practices for taxonomy and information architecture.
- ▶ Version control is difficult because of inconsistent naming conventions
- ▶ Reinventing the wheel promotes inefficiency in proposal development.

As Agiloft is keenly aware, virtual is the reality of the times, driven by an emerging global economy, shifts in business structure, and enhanced technological capabilities. With the consistently increasing requirement for Agiloft to respond to proposal requests, it is intuitive and strategic to establish a virtual proposal center.

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GOALS AND OBJECTIVES

The APRC can be easily created on the foundation of Agiloft's existing SharePoint environment. The primary benefit of having all proposal-related content and activities consolidated into one central location is beneficial, but establishing this APRC offers a variety of other benefits.

Life Just Got Easier

The APRC will provide a platform that facilitates effective and efficient collaboration and communication between teammates, worldwide. With the APRC implemented, Agiloft will improve its accessibility and management of RF[x]-related content and optimize and streamline the development and response process.

Centralize your approach: A central repository is at the core of the APRC, so your staff members don't have to become researchers and archaeologists for every proposal efforts. The APRC allows you to centralize your proposal development and management approach—enhancing visibility, controlling risks, reducing duplication of effort, and minimizing resource inefficiencies.

Streamline proposal activities: You can't afford for your team to be so accustomed to hunting for key proposal data that their typical duties are back-burnered during "crunch time." The APRC provides a common work area enables your proposal team to locate necessary RF[x] artifacts in the right place, at the right time ... every time. Onsite and remote proposal teams will be able to collaborate effectively—with around-the-clock access to relevant tools and information required to plan, assemble, create, review, and distribute proposals.

Reduce duplication of effort: Mitigate the "too-many-cooks-in-the-kitchen" phenomenon. Too many people handling too many responsibilities equals duplication of effort; less work gets completed. The APRC will provide the ability to assign specific responsibilities and site access to the appropriate team members and stake holders.

Recommendations

With the APRC in place, the amount of effort the Agiloft team uses to prepare proposals is significantly reduced. There is no longer wasting time creating new proposals from scratch or looking for information — everything you need is in one location.

The following recommendations will ensure the APRC implementation functions optimally:

- ▶ Use existing SharePoint environment.
- ▶ Establish governance, security, and access permissions during the design phase.

OVERARCHING GOALS AND OBJECTIVES

- ✓ Design and implement flexible and scalable solution for proposal management.
- ✓ Improve accessibility and management of proposal-related content.
- ✓ Manage and maintain accurate, relevant, and up-to-date content.

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- ▶ Designate an Information Architect/Administrator to manage and maintain the implemented APRC.
- ▶ Establish SOPs and identify appropriate workflows so team members can understand the expectations and essential processes.
- ▶ Provide training (or a training outlet) for APRC users and visitors to enhance user adoption and encourage proper use of the site.

Project Outcomes and Benefits

- ▶ Reduction in RF[X] preparation time
- ▶ Increased productivity from better search capabilities
- ▶ Improved quality of proposal content
- ▶ Improved versioning control
- ▶ Increases productivity and efficiency with proposal development and management
- ▶ Increases document control and versioning
- ▶ Improves reliability of content re-use
- ▶ Decreases turn-around time by minimizing the number of handoffs between authors, reviewers, developers, and managers
- ▶ Facilitates closer collaboration with partners and staff working remotely or away from headquarters
- ▶ Reduces proposal development costs by increasing proposal assembly capabilities
- ▶ Further automates the business and proposal development best practices

REQUIRED RESOURCES

The Agiloft Proposal Center (APRC) is a solution designed, implemented, and deployed on its own site collection in a locally maintained SharePoint environment. Most configurations can be done at the site-collection level. This configuration will require access as a site collection administrator and will likely require connecting to SharePoint Designer.

Resource	Responsibilities	Required (Yes/No?)
Agiloft SharePoint Administrator	<ul style="list-style-type: none"> ▶ Internal to Agiloft ▶ Provides needed access to APRC ▶ Collaborates and coordinates with APRC Content Manager/Architect 	Yes
APRC Content Manager/Architect	<ul style="list-style-type: none"> ▶ Oversees entire APRC operations and maintenance ▶ Collaborates and coordinates with Agiloft SharePoint Administrator ▶ Coordinates with Technical Writer(s) and Assistant Content Manager 	Yes
Assistant Content Manager		No (nice-to-have)
Technical Writer(s)		No (nice-to-have)

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STRATEGY

Devising a good strategy (in concert with a clearly defined project goal) will establish the APRC on a solid foundation. Adequate time and effort should be spent in deciding in clear terms what should be achieved, the goal! Then you can work out the optimum strategy and then plan how to implement the strategy effectively. Focus on the key early decisions that determine the project delivery strategy. Understand and align with Agiloft's business strategy.

Phase I – Design and implementation

Objective	Activities	Responsible*
Work plan development and approval	<ul style="list-style-type: none"> ▶ Develop comprehensive work plan for APRC. ▶ Agiloft approval to proceed 	PP
Overall management	<ul style="list-style-type: none"> ▶ Determine library type (Internet, extranet, intranet) ▶ Identify personnel who will maintain and access the APRC. ▶ Evaluate the documents and content that will go into the APRC (see Document Usage Analysis in appendix). 	DC, PP
Hierarchy and structure	<ul style="list-style-type: none"> ▶ Determine how the documents will be organized (collections, sites, and libraries). ▶ Identify content control (versioning, content approval, and check out). ▶ Determine if workflow processes are needed. 	DC
Content types	<ul style="list-style-type: none"> ▶ Determine content types for the information going into the APRC. ▶ Identify metadata associated with each item of its type. ▶ Outline content management content and workflow processes. 	DC
Framework design and implementation	<ul style="list-style-type: none"> ▶ Design APRC environment look and feel. ▶ Create collections/sites/libraries. ▶ Add metadata for each content type. 	DC
Populating APRC and testing functionality	<ul style="list-style-type: none"> ▶ Move documents into associated collections/sites/libraries ▶ Fill in metadata fields for each item migrated into APRC. 	DC
APRC beta test	<ul style="list-style-type: none"> ▶ Provide access and instructions to beta group* to test APRC. ▶ Manage bugs and recommendations from the beta test group. 	DC, PP, BC
APRC roll out	<ul style="list-style-type: none"> ▶ Announce APRC implementation. ▶ Provide training to identified users. ▶ Develop procedures/guidelines for APRC use and management. 	PP, BC

* Recommended beta test group = DC, PP, BC, SD

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APPENDIX

Document Usage Analysis

The document usage analysis tool is helpful for planning document library organization. It helps to determine how the document libraries should be structured, which site templates to use, how many sites will be needed, and which information management policies to use on the sites.


Documents	SharePoint Collection/Site	Purpose	Author	Users	Format
Corporate Documentation					
General Company Information	Boilerplate				Word
Headquarters and Other Locations	Boilerplate				Excel
Staff Numbers	Boilerplate				Excel
Awards and Industry Recognition	Boilerplate				Word
Financial Stability Narrative	Boilerplate				Word
Reps & Certs	Boilerplate				Word/PDF
Training Model	Boilerplate				
Support Model	Boilerplate				
Market Position	Boilerplate				
Data Breach Indemnification	Boilerplate				Word
Data Breach Indemnification			Sales, CEO		Word
W-9					
Competition					
Roadmap					
Hosted SLA					
Agiloft Logo	Images				GIF, PNG
Partner Logos	Images				JPEG, BMP, GIF, TIF
Project References and Case Studies					
Project References	Past Performance				Word
Case Studies	Past Performance				Word
List of Successful	Past Performance				Word


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Documents	SharePoint Collection/Site	Purpose	Author	Users	Format
Implementations					
RF[X] Templates					
Agiloft Implementation Team	Templates				Word
	Templates				PDF
	Templates				Excel
	Templates				PPT
	Templates				Word
	Templates				Word
Resources					
Agiloft Branding Guide	Resources		Agiloft Marketing		PDF
Style and Usage Guidelines	Resources		Agiloft Marketing		PDF
Trademark Usage	Resources		Agiloft Marketing		PDF
Agiloft Standard CM RFI Response	Resources		Agiloft Sales		
Agiloft Reference Manual	Resources				PDF
Implementation-to-Deployment Information Sheet	Resources		Agiloft Sales		PDF
Mobile Interface Information Sheet	Resources		Agiloft Marketing		PDF
SLAs	Resources				PDF

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APRC Mockup


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DASHBOARD | [PIPELINE](#) | [SITES](#) | [ASSETS](#) | RESOURCES



QUICK LINKS

- [Agiloft Website](#)
- [Pipeline](#)
- [Current Pursuits](#)
- [Development Sites](#)
- [Asset Library](#)

QUESTIONS?


Contact:

- Patricia Pritt
- Bridget Conrad

WHAT ARE WE CURRENTLY WORKING ON?

Status	RFP/RFI	Title/Description	Due
● Active	RFI	Hexcel CMS	04/09/2018
● Pending	RFP	Disney Affiliate	04/27/2018
● Pending	RFP	Applied Materials	04/30/2018
● Submitted	RFP	AHA CMS	03/23/2018

CALENDAR




NEWS/UPDATES

APR 13 | 8:00 AM
Disney Affiliate just released their RFP. Questions are due by April 23th EOB

APR 06 | 3:00 PM
Waiting on solicitation from Applied Materials. Anticipated release date is Monday, April 9th.


APR 01 | 10:00 AM
Spring Break and Easter are behind us. Time to get back working on the sales pipeline.


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MASTER PIPELINE OF OPPORTUNITIES

Status	RFP/RFI	Internal Title	Date Due	Date Released	Date Submitted	Customer	Solicitation No.	POC	POC Title	POC Email	POC Phone
Active	RFI	Hexcel CMS	04/09/2018								
Pending	RFP	Disney Affiliate	04/27/2018								
Pending	RFP	Applied Materials	04/30/2018								
Submitted	RFP	AHA CMS	03/23/2018	03/09/2018	03/22/2018	American Hospital Association		Megan Schaefer		mschaefer@aha.org	312-422-2775
Submitted	RFI	Nike ECM	11/13/2017	10/02/2017		Nike, Inc.		Teri Johns		teri.johns@nike.com	
Submitted	RFI	Nissan CMS	09/01/2017	08/14/2017		Nissan North America, Inc.		Ben Hyman		Benjamin.Hyman@Nissan-usa.com	
Submitted	RFI	Nestle Contract Authoring Tool	07/28/2017	07/04/2017		Nestle SA		Sonia Douang Praseuth	Regional Strategic Buyer	Sonia.douang@pa.netsle.com	+5 076 250-4095
Submitted	RFI	GLHEC CMS	06/22/2017	05/25/2017		Great Lakes Higher Education Corporation	2017-052517	Jackie Schwartz	Legal Team Coordinator	jschwartz@glhec.org	
Submitted	RFI	GBTA CMS	12/07/2017	11/14/2017		Global Business Travel Association	17-5-010	Kristen Talma	Intern, Global Strategic Sourcing and Contracts	ktalman@gbta.org	703-236-1149
Submitted	RFI	HHSC CMS	10/06/2017	09/28/2017		Hawaii Health Systems Corporate	17-014	Jeffrey E. Dansdill	Senior Contracts Manager	jedeansdill@hhsc.org	808-657-3721

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DEVELOPMENT SITES

RFP/RFI	Solicitation No.	Internal Title	Status
RFI		Hexcel CMS	Active
RFI		Nike ECM	Submitted
RFI		Nissan CMS	Submitted
RFI		Nestle Contract Authoring Tool	Submitted
RFI	2017-052517	GLHEC CMS	Submitted
RFI	17-S-010	GBTA CMS	Submitted
RFI	17-014	HHSC CMS	Submitted

RFP/RFI	Solicitation No.	Internal Title	Status
RFP		Disney Affiliate	Pending
RFP		Applied Materials	Pending
RFP		AHA CMS	Submitted


HEXCEL CMS DEVELOPMENT SITE
Each development site will consist of the following three folders:

- 1-Procurement**

Contains all information related to the procurement process (e.g., solicitation document, questions, responses to questions, amendments, etc.)
- 2-Development**

Contains all information related to developing the proposal response (e.g., Word and Excel docs)
- 3-Final Submit**

Contains the final submitted document(s)


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ASSET LIBRARY

CORPORATE CONTENT

- ▢ Agiloft W9
- ▢ Awards and Industry Recognition
- ▢ Company Background
- ▢ Company Organization
- ▢ Company Qualifications
- ▢ Competition
- ▢ Data Breach Indemnification
- ▢ Financial Statement/Position
- ▢ Historical Milestones
- ▢ Ownership/Leadership
- ▢ Market Position
- ▢ Partnerships and Affiliations
- ▢ Reps & Certs
- ▢ Solution Roadmap
- ▢ Staff Numbers

SOLUTION CONTENT

- ▢ Analysis and Reporting
- ▢ Brower Support
- ▢ CLM Product Overview
- ▢ Customer References
- ▢ Expandability and Scalability
- ▢ Implementation Services
- ▢ Industry Differentiators
- ▢ Integration Methods
- ▢ Licensing and Pricing
- ▢ Mobile Devices and Interface

- ▢ Professional Services
- ▢ Project Approach
- ▢ Sample Implementations
- ▢ Sample Schedule
- ▢ Security
- ▢ Support Model
- ▢ Technology Stack
- ▢ Upgrades and Enhancements
- ▢ User Experience

GRAPHICS

- ▢ Agiloft logo
- ▢ PC Magazine graphic