

# QorusDocs Case Study

How AI is Used in Proposal Management



# Case Study Participants

## Vendor



Ray Meiring  
CEO  
QorusDocs



Jennifer Tomlinson  
EVP Marketing  
QorusDocs



## Clients



Sr. Manager, AI Strategy  
Global IT Services and Consulting



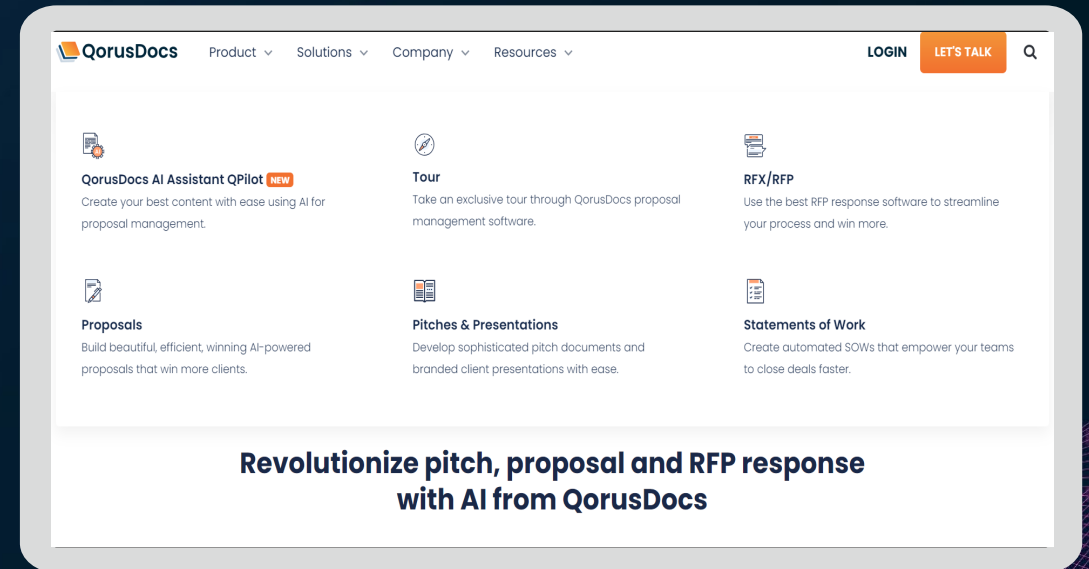
Manager  
Mid-size Engineering Company



# Table of Contents

---

- 4. **Executive Brief**
- 6. **Challenge**
- 7. **Solution**
- 12. **Results**
- 17. **Recommendations**





“QorusDocs has allowed our teams to be more agile and responsive, significantly reducing the time it takes to create proposals and improving our overall win rate.”

– Sr. Manager, AI Strategy, Global IT Services and Consulting

**Challenge:** Businesses are spending too much time on manual, repetitive proposal creation and RFP response tasks. This inefficiency prevents teams from focusing on higher-value work, like building client relationships and closing deals.

**Solution:** QorusDocs provides an AI-powered solution that automates the proposal and RFP response process. The solution centralizes resources, templates, and project management tools, streamlining content creation and collaboration across teams.

**Result:** Companies that implement QorusDocs experience significant time savings, increased productivity, faster deal cycles, and improved proposal win rates, allowing them to scale their growth more effectively.

## Case at a glance



10/10 client NPS



5x increase in RFP responses



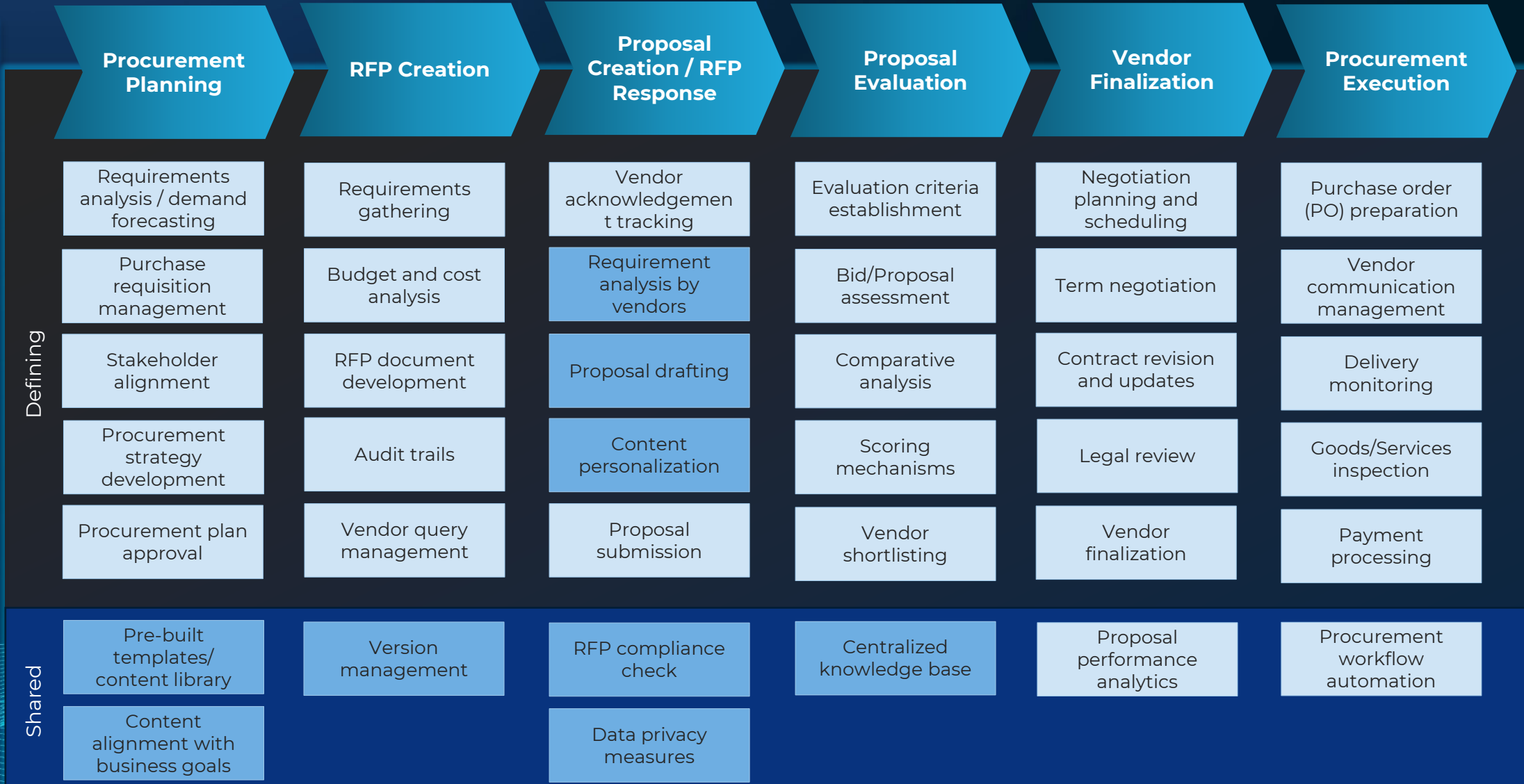
Improved quality control

# QorusDocs enhances the procurement process

The business capability map for proposal creation and management identifies the functions that enable value creation.

These capabilities will inform candidate opportunities for AI to enhance value.

Highlighted boxes represent the capabilities that the vendor provides within the procurement process.





# The current state of proposal management is rife with challenges

## Collaboration Challenges

Most RFP team members are not adequately trained on RFP best practices.

Multiple team members working on different versions of the proposal creates chaos.

Delayed or incomplete feedback from key contributors disrupts the process.

## Time Management Challenges

Excessive back-and-forth during reviews delays finalization.

Late-stage adjustments compromise the proposal's coherence and polish.

Over-reliance on non-automated methods increases inefficiency.

## Content Quality Challenges

Lack of customization fails to address specific client requirements.

Sections of the proposal feel disconnected due to differing writing styles.

Use of outdated or incorrect information reduces the proposal's credibility.

## Resource & Tech Challenges

Most organizations are absent of standard RFP templates, tools and processes.

Inaccessible past proposals or templates hamper productivity.

Challenges in getting timely input from subject matter experts.

Opportunity to optimize

# The use cases for QorusDocs – why you need an AI proposal management platform

## 1. Proposal Creation and Automation:

- Streamlines the process of creating and customizing proposals, including automating repetitive tasks such as populating templates with data from CRMs (e.g., Salesforce or Microsoft Dynamics).

## 2. RFP Responses:

- Automates and accelerates the completion of complex RFP responses, ensuring they are consistent, accurate, and aligned with client requirements.

## 3. Pitch Document Development:

- Enables the creation of polished and tailored pitch documents or branded client presentations that align with company goals and branding.

## 4. Centralized Knowledge Management:

- Consolidates content into a single repository, ensuring easy access, consistency, and the latest updates across teams, enhancing collaboration and productivity.
- Seamlessly integrates into Microsoft Office products, allowing users to work in familiar environments while benefiting from advanced automation and content management features.

### What is a use case?

- Use cases represent the list of tasks that stakeholders can perform and are directly related to the requirements of the business process.
- Use cases are performed in support of a given business capability.
- Prioritizing your list of use cases is a critical step in any AI-related implementation.



# QorusDocs uses a combination of AI types

## 1. Generative AI

- Used to produce content for RFP responses, pitches, and proposals, ensuring the most effective and winning content is included.

## 2. NLP (Natural Language Processing)

- Used for analyzing and understanding user input and generating contextually relevant content for proposals and RFPs.

## 3. Machine Learning

- Applied for learning from previous proposal data and improving content recommendations, such as suggesting the most relevant templates or sections.

### Types of AI

- **Classification-based AI:**  
Categorizes data into predefined classes. Examples include sentiment analysis and image recognition.
- **Generative AI:**  
Produces new data that is similar to existing data, often with an element of creativity. Examples include text and image generation.





# The business case for QorusDocs is quite compelling

“For our specific needs, QorusDocs is the best tool because it allows us to seamlessly work within Microsoft Office while creating highly customized proposals. Its ability to integrate effectively into our existing workflows saves time and simplifies our process, making it an invaluable resource for our team.” – Manager, Mid-size Engineering Company

## TRANSPARENT TCO

- Annual subscription cost for a mid-size firm is around \$50,000.
- The onboarding process costs about \$20,000, including assistance with setup and integration.
- Flexible ‘Pay per license’ pricing options are beneficial for smaller teams.

## SIGNIFICANT TIME SAVED

- Automates up to 80% of proposal creation tasks, reducing the time spent on manual processes like updating content and formatting documents.
- Saves up to 50% of time in creating proposals by leveraging AI-powered templates and content suggestions.

## INCREASED PROFITABILITY

- AI-driven content optimization boosts engagement and tailoring, increasing win rates by up to 20%.
- Standardizing templates and content reduces the need for multiple versions and manual updates, saving time and resources.

### Payback Tier

### ROI

3 months or less

1,000%+

1 year

250%

3 years

20%

5+ years

0%

No payback

QorusDocs is a no-brainer from an ROI perspective.

# QorusDocs value drivers

A high-value-add solution with no apparent risks or downsides.

## Value drivers



### Operations efficiency



QorusDocs automates time-consuming proposal and RFP tasks, freeing up resources and allowing teams to work more efficiently, which reduces operational bottlenecks.

### Business growth



By accelerating the proposal creation process and improving win rates, QorusDocs helps businesses scale their operations and pursue more opportunities, contributing to growth.

### Customer experience



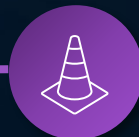
QorusDocs allows teams to respond quickly and accurately to customer RFPs with personalized, high-quality proposals, improving the overall client experience.

### Employee experience



The platform streamlines workflows and provides easy access to content, reducing the burden of administrative tasks and improving employee satisfaction by enabling more strategic work.

### Risk and resilience



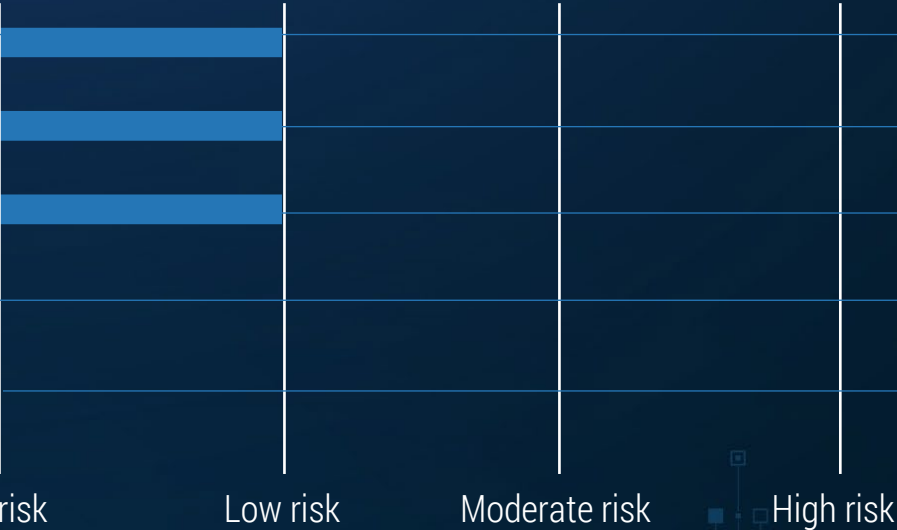
QorusDocs ensures consistency and compliance in proposal documents, reducing the risk of errors or missed deadlines, which helps build operational resilience.



# QorusDocs involves a relatively low level of risk

## Rationale:

Bias & discrimination



Historical and data bias may exist in generative processes.

Lack of explainability

The reasoning behind AI decisions might not always be fully transparent.

Accuracy

AI content is validated and reviewed for errors before being incorporated.

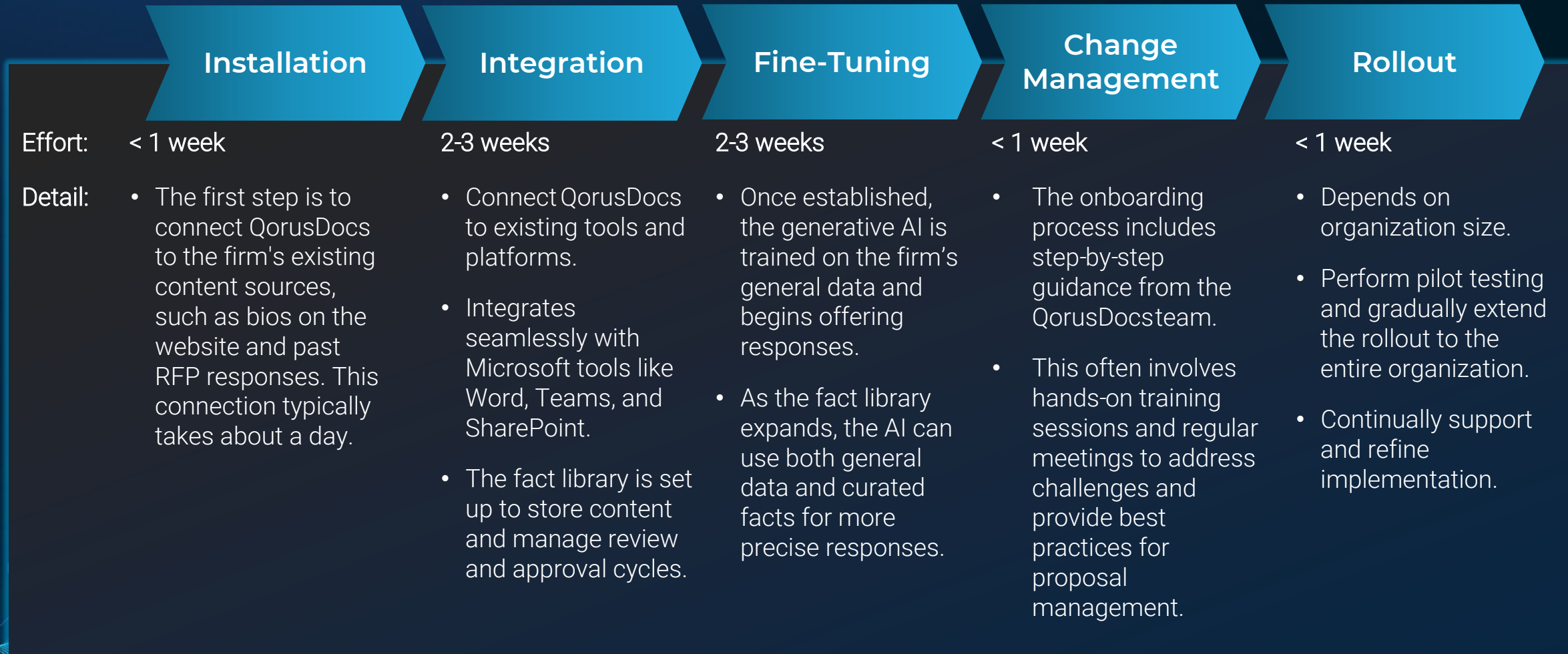
Data quality & availability

Centralized content and automated workflows ensure availability.

Privacy & data security

Mitigated by using Microsoft Azure, which ensures data security and prevents external model training.

# Little effort is required to successfully implement QorusDocs





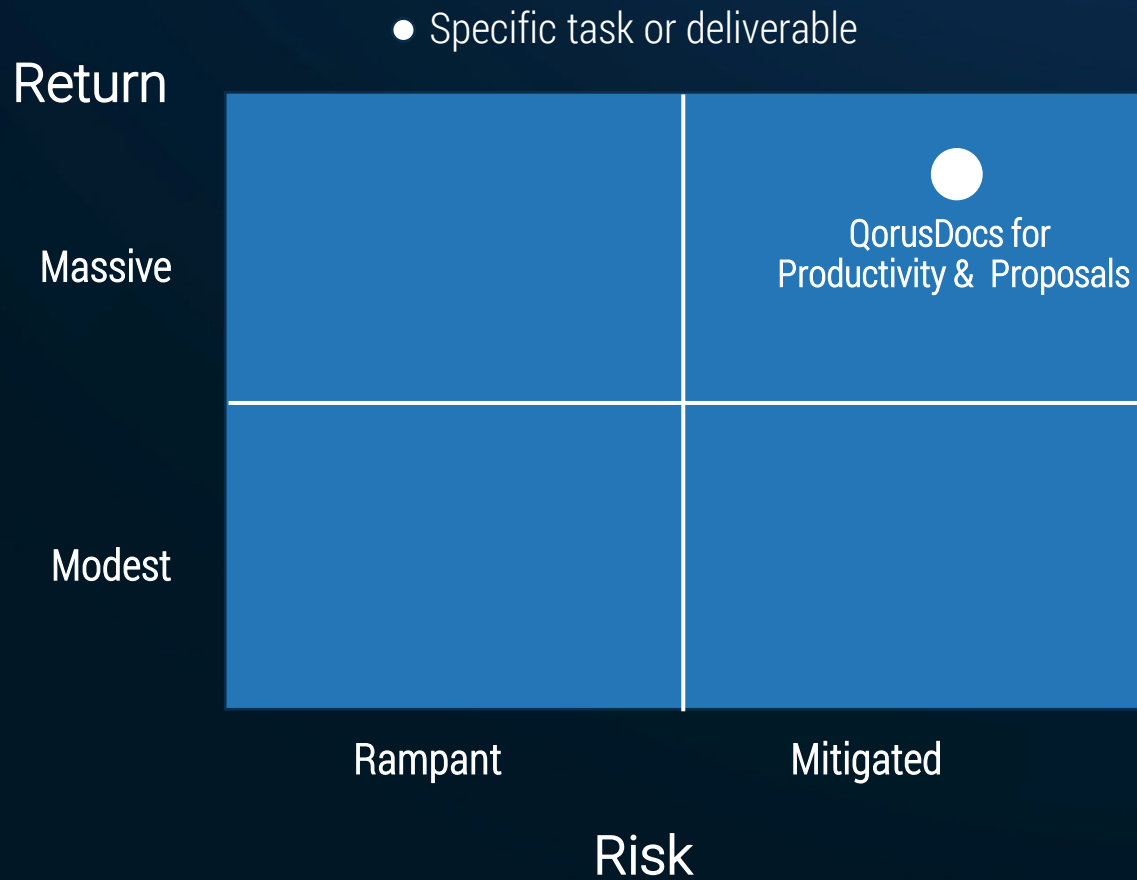
# QorusDocs appeals to a broad array of users

Organization Type	Rating
Small enterprise	1
Medium-sized enterprise	4
Large enterprise	4



User Segment	Rating
Sales teams	4
Business Development teams	4
Proposal managers	4
Fee earners	4

# QorusDocs is well positioned on the risk/return index



## Rationale:

- With its use of Microsoft Azure, QorusDocs addresses privacy concerns and mitigates data security risks.
- The tool has demonstrated significant returns through faster proposal cycles, higher win rates for bids, and improved document collaboration, leading to increased business growth.



# QorusDocs is easily validated to ensure success criteria are met

“Their customer service is excellent. They always reach out, check in, and see how things are going. I really appreciate that.”  
– Manager, Mid-size Engineering Company

## Customer Support



✓ Offers customer support service and problem-solving within 24-48 hours.

## Time-Saving



✓ The tool makes the proposal creation process quicker by 5x.

## Scalable



✓ The tool supports many users, facilitating widespread adoption and collaboration within a firm.

### 1. Review the Vendor Landscape

- There are relatively few vendors who provide equivalent services to QorusDocs.
- Other tools to review are Loopio, Qvidian, and Responsive.
- Ensure any competitors are equally committed to the personal productivity market.

### 2. Confirm Key Features

- Offers strong customization and flexibility options.
- Offers AI-based proposal generation features.
- Has ability to collaborate and integrate with existing platforms and provide analytics and insights.

### 3. Validate the Capabilities

- QorusDocs is validated through a trial or proof of value.
- Be sure to validate by working with different features of QorusDocs.

Here are the **selection process** steps for applications like QorusDocs.

Please refer to *The Rapid Application Selection Framework* and *Select Your Generative AI Vendor* for more best practices.

# Use QorusDocs to accelerate high-frequency, high-risk proposal creation

## Roles of AI



- QorusDocs provides automation and AI-driven suggestions.
- QorusDocs greatly reduces the amount of time required to create proposals and makes the result more efficient by curating solutions for a targeted audience.



## Bottom line:

QorusDocs is a **recommended AI solution** for proposal management for mid-sized and large organizations.