

Three Features that no Proposal Automation Software can go without

By Johnny Jones

PitchPerfect has grown in client base and functionality significantly since I first joined the team back in 2015. When you work with an application day-to-day it is all too easy to start taking its features for granted so I've taken a step back to appreciate the top three features that still make that big difference every day.

Quick and Easy Content Insertion and Formatting

Inserting and formatting content may sound like an obvious feature to mention, and you might wonder how this makes a difference big enough to sustain my excitement! The fact is that content is the heart of a pitch. Proposal automation without an impressive capability to get you to the first draft rapidly would defeat the goal of the implementation. As the founding feature of PitchPerfect we continue to invest in making it faster and simpler for clients to search, select and insert content into their Word or PowerPoint documents in the correct format in a matter of seconds.

Take something as non-negotiable as a team sheet or credentials statement as an example. Doing this manually usually requires you to look up data in a firm directory or spreadsheets, and then copy and paste this information together for every team member or credential. At this point you likely have not even thought about the formatting. As you start extending this example to a whole pitch (today typically involving new or additional diversity and inclusion questions or those around social responsibility) the complexity grows exponentially. Navigating this wide range of content through a single, intuitive interface regardless of the practice area, office location, fee earner or anything else is like a breath of fresh air – which is why it's so easy to get used to and much of the reason why the adoption of PitchPerfect goes so well with minimal training.

Live Editing

One of the most common requests we received for PitchPerfect in the product's infancy was the ability to apply formatting to large fields of text within a pre-determined layout. For example, in a capability statement or case study record, clients wanted to add bold, italics and other styles such as headings and bullets to one individual field. We've always followed the approach of evolving the product in line with practical client needs – hence the feature was developed, and it continues to be one that serves a commonly shared desire, making practical work just that much simpler.

We created our own lightweight HTML mark-up to make this possible and extended it to the ability to simultaneously update the content itself by making changes to the wording. Our clients can apply styles and edits directly in the Microsoft Word or PowerPoint proposal to get it precisely to where it needs to be. Whilst this on its own is important, what is even more critical is that these changes are also reflected in the core content pieces that live in the centralised content repository. Our Live Editing feature makes it possible to pull all of the formatting changes into the core content automatically, whilst also eliminating the extra hoops of searching for the original content piece in an extensive library to make an update you already had in a document. This guarantees effortless maintenance of the content, ensuring that it's always up to date. We have also addressed the need for appropriate agreements to make such amends by allowing clients to implement an approvals process so that content submissions aren't immediately live in the core system until a content owner has signed off on the edits.

Closing the loop on the content maintenance challenge is definitely one of the most significant feature changes that I have seen in PitchPerfect and it's making a big difference for our clients that have now implemented this feature.

PitchTracker and Reporting

When we first speak to clients before starting a PitchPerfect project, most are already tracking their proposal output in some format – be that using a CRM tool or simply an Excel spreadsheet. However, the problem we hear time and time again is that users are either not logging the pitches or they are not updating the tracked record with the outcome details. Tracking is integral to better data-driven decision-making in the world of proposals and creates the only truly reliable foundation to implement continuous improvements.

This process is what PitchTracker makes so much easier. It allows users to log the pitch at the same time as creating it, without having to exit out or minimize the document to go into another system or spreadsheet. PitchTracker provides users with a set of fields that are accessible from a panel inside Microsoft Word and PowerPoint. Monotonous tasks like copy and pasting a document number or link into a tracked record are taken away by seamless integrations to your DMS or SharePoint document libraries in which all of these are automatically captured. Whenever the user re-opens the document in the future from the DMS or SharePoint document library, the latest information about that tracked proposal will appear on the PitchTracker panel, making it easy to update with any further details.

Finally, the beauty of PitchTracker is really in the output that it can provide. As all of the data captured on PitchTracker panel is pulled into a SharePoint list, reports and visualisations can be created and shown on dashboards using this information.

