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How to Get Executive Buy-in for Proposal Management Software

(for Professional Services)

Proposal management software can close the gap between securing client business and wasting countless hours and energy on a proposal that falls flat or gets lost in the crowd.

You know this. The pitch team knows this. The client engagement team knows this. But convincing the C-suite to get on board with investing in a proposal management solution can be the elusive step to optimizing your response process.

While those of you on the frontline creating pitches and responding to RFPs recognize that AI-powered proposal automation software helps your business development team create visually compelling proposals, RFP responses, pitches, and presentations that demonstrate the value you bring (a recent benchmark study confirms this!), getting executive buy-in remains a challenge.

Time to speak C-suite

Put on your executive hat, step into their shoes, and consider what drives the CMO, CIO, and Partner(s) at your firm. What operational and client challenges keep them up at night? What motivates them to give the green light to certain projects and technology investments but not others? What are their goals and vision for the organization?

By focusing on what the C-suite cares about, you can speak to their challenges and emphasize how proposal management software can alleviate their pain points and help the firm achieve its overall vision. Give your executive team a clear picture of the benefits of adding proposal automation software to your firm's tech stack—and you'll be well on your way to automating your response process to save time, improve quality, and increase time with your clients. Read on for the benefits for your leadership teams.

CMO:

1. Enable targeted client follow-up, using intelligence from prospect and client content engagement data.

2. Improve decision-making with AI-powered intelligence that offers insights and built-in measurement tools to extract and analyze data from RFP responses and proposals.

3. Ensure brand control across all teams and documents.

4. Increase efficiency of response process with centralized content hub and streamlined collaboration across applications, departments, and geographic locations.

5. Enhance customer experience with up-to-date, personalized content that resonates with buyers.

CIO/IT:

1. Protect data with robust security and privacy controls.

2. Simplify collaboration across the organization with integrated software that seamlessly fits into the quote-to-cash tech stack.

3. Save time and resources with centralized content hub, seamless integration and AI-driven content recommendations.

4. Get peace of mind with secure, branded documents hosted in Microsoft Azure.

5. Enable secure sharing of proposals and other sales documents from any location to increase team efficiency.

Pitch team:

1. Create initial drafts quickly, easily and with accuracy. Save time with co-authoring, version controls and tracking changes.

2. Enjoy easy access rights to all approved, branded content. Ownership of content remains with appropriate department, Partner or practice group.

3. Stay organized with all documents related to a single opportunity together, even RFPs, pricing worksheets and presentations.

4. Take advantage of global language content search, accommodating 26+ languages. Easily search/find materials in local language.

5. Improve team retention by giving proposal and pitch teams technology tools that simplify their daily job and help them develop new skills.

6. Customize templates and rules. If the team is decentralized by geography or practice group, you can provide custom templates.

7. Leverage Share & Track to enable proposal team to create best practices based on user interaction.

Partner/fee earner:

1. Increase your billable hours by spending less time on pitches.
2. Collaborate easily with associates, managers, and senior managers in pitches, giving them the opportunity to develop in their careers.
3. Work in technology you know: Microsoft Word, PowerPoint, Outlook, and Excel.
4. Understand how pitches are used by clients and develop best practices, thanks to Share & Track features.
5. Retain control over biographies while giving broad access; no more redline documents sent via email.
6. Enjoy accurate time and cost reporting with pitches with more licensed users.

Business Development/Marketing:

1. Access ready-to-use content, reviewed and rated for potential client usefulness.
2. Improve quality of documents using auto-answer feature and searchable content.
3. Create high quality first drafts quickly and easily.
4. Retain ownership of content by department/practice group while allowing access to full firm.
5. Eliminate need for document formatting with specific templates by department and practice group.
6. Easily assign document sections for completion by team or non-team members.
7. Streamline content addition/elimination by client managers who know their clients best.

> *"We have calculated that we spend almost 30% less time creating and managing content. It also helped us increase pitch output by about 25%."*
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> Jennifer Manton
> Chief Marketing and Business Development Officer
> Kramer Levin

Make the case

In a world where market dynamics have changed, the buying process takes longer, and expectations are more complex, optimizing your response process to consistently create personalized, professional, and on-brand proposals is more important than ever.

Proposal management software simplifies and intelligently automates the creation of the most critical documents your organization produces, helping you win more business-critical value the C-suite will recognize and support.

For supporting material to help you secure buy-in from your leadership team to implement proposal management software, present them with case studies showcasing the extensive benefits of automating the response process. Check out the transformation at Kramer Levin, a compelling example of the power of AI-driven proposal management software to streamline content management and accelerate the response and pitch process.

Plus, don't miss our Professional Resources Hub. This curated collection of resources is tailored to the unique needs of professional services organizations, including a ProServ proposal management guide, a range of downloadable templates, pursuit checklist, presentation tips, and more.