

Global Market Outlook (GMO) - Digital enhancement

1. Background

The GMO is our monthly macroeconomics pack that provides our customers with updates and analysis on the current and projected market environments. The current format is a Powerpoint deck containing a few sections of templated static slides, such as the “Market themes” section, which is made of 5 slides, each covering a specific theme, and made up of:

- Market theme title and commentary (3-5 bullet points)
- Custom illustration that sets the visual theme/colour palette of the slide
- Data chart with source

This Powerpoint format is well received, but offers limited opportunity for repurposing content, increase visibility, engagement, shareability, etc. A past edition of the GMO has been provided for reference.

2. Our ambitions

1. Transform the GMO into an interactive, responsive, shareable web-based digital experience that enhances user engagement and improves data comprehension
2. Identify and implement an efficient, template-based, repeatable and cost-effective workflow to produce and publish the new GMO on a monthly basis.
3. The new workflow must be executable with minimal technical expertise and should retain the ability to export to PowerPoint for traditional distribution channels.

3. Features we are looking for

1. Core features :

- a. Ability to easily generate responsive, on-brand, interactive web experiences from raw data or static charts, maintaining the current GMO structure (commentary + illustration + chart + source)
- b. Flexible deployment solution, including via Web embedding (shareable URLs, iframe embeds for websites/portals) and PowerPoint export in static format with visual fidelity
- c. Multi-lingual support – ability to import translation or to directly generate translations from within the tool

1. Additional features (nice to have, future vision & scalability).

- a. Template Library Approach:
 1. Create and manage multiple report templates, not just existing GMO slides
 2. Maintain consistent brand identity whilst allowing format flexibility
- b. Ability to analyse data and suggest best data visualisation approach
- c. Centralised data management solution to update charts (or ability to plug into internal or external data sources)
- d. Built-in data governance system to ensure that all data is accurate, licenced and safe to use

4. Key Questions to Explore

1. **Optimal workflow design:** What is the best approach for creating these monthly packs? Should we:
 - a. Continue designing in PowerPoint first, then convert to interactive?
 - b. Design directly in a new tool/platform and export to PowerPoint when needed?
 - c. Use a some sort of hybrid approach with templates and data inputs?
2. **Timing and technology maturity:** Given the rapid advancement of AI tools (e.g., Microsoft Copilot for PowerPoint, fast evolving capabilities of AI models, etc), should we:
 - a. Build a custom solution now that gives us full control?
 - b. Wait for native PowerPoint AI integrations to mature sufficiently?

- c. Implement a lightweight interim solution whilst monitoring AI tool development?
- d. Consider the opportunity cost of waiting vs. benefits of early implementation?

5. Technical Considerations

- Must be tech stack agnostic and compatible with standard modern web infrastructure
- Our preferred approach would be to leverage existing AI coding assistant technology to develop our own tool / templates and minimise ongoing software licensing costs, but we are also definitely open to using off the shelf tools/platforms (e.g., Flourish, Tableau, etc) if there is a strong rational for this approach (in terms of features available, deployment time, etc).
- The solution must be data sources agnostic (Excel, database, API, etc)

6. Deliverables:

1. Phase 1: Technology Assessment / workflow design

- a. Evaluation of 3-5 suitable solutions (build vs. buy vs. hybrid), including for each approach:
 - i. Pros/cons and cost comparison
 - ii. Assessment on compatibility with AI coding assistants approach vs dependency on third party tool licences or services
 - iii. Potential workflow, e.g., Design in PowerPoint and then convert vs. produce within tool and then export
 - iv. Timeline estimate and resource requirements
 - v. Risk assessment and mitigation strategies
- b. Analysis of timing considerations for each approach (build now vs. wait for AI tool maturity)
- c. Recommendation for top 1-2 approaches with clear rationale

2. Phase 2: Workflow development + proof of concept for selected approach

- a. Proposed optimal workflow for monthly GMO creation
- b. Step-by-step monthly production process including time estimates for each stage
- c. Technology stack and tools used
- d. Proof of concept demonstrating the production of 2-3 interactive GMO slides including:
 - i. Interactive functionalities (hover states, responsive design, embedding)
 - ii. PowerPoint export sample demonstrating output quality
 - iii. Mobile and desktop responsive views
 - iv. Demonstration of monthly update workflow

7. Budget & Costing Approach:

Please provide a detailed quote for completing all of Phase 1 and Phase 2 deliverables