

# 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