RFP Generator General Feedback Document

8/7/25

* I have gathered a fresh group of RFPs and you can find them in this folder

<https://drive.google.com/drive/folders/18xRqZgM_efgbdp0aqEMvaYQYajVjPT6I?usp=drive_link>

These RFPs are more complex and have a significant number of challenges. Check out this one for a large and complex document

<https://drive.google.com/file/d/1FXkzCXKJteytSSj03J2_f1dV1gq4-4IN/view?usp=sharing>

* In the Document Upload Center I was able to add PDFs and DOCs but no PPTs. I could see the upload happening but do not know where the docs end up.
* Are the “Document Types” boxes at the top of that page meant to be an organizing system? That makes sense. Would you click on that button to upload “Past RFP Responses” to that folder?
* I uploaded a new RFP for review. I received the 3 paragraph summary but did not get the rest of the breakdown of the full document’s questions
* Once an RFP is uploaded it should go into the Work In Progress area
* I see the new RFP in the Library but am not able to click View or to access it.
* I see the previously uploaded background documents in the Library but do not see any of the new ones I uploaded. Can we clean out the current AI generated ones and use the ones I uploaded - the first group is actual RFP responses from Ringer. Once that upload works I will add case studies, fact sheets and other documents. Let’s reset this so we can get the Ringer documents in place so we can start looking at the voice and tone of the responses.
* I added one of my users to respond to a question in the existing RFP from Synovate. The email it sends is excellent! One last detail on that when it gets to production will be a “log in” button so the user can click from the email to the application
* Pull out critical instructions and include in the initial summary. (Has to be ALL of the instructions and the agent needs to check its work!) The RFP I uploaded - Request for Proposals (RFP) 2025-003 - Tourism Digital Marketing and Creative Services.pdf - has mission critical issues that need to be summarized and presented at the very beginning of the process. For instance, all deadlines, submission requirements, need for meetings, etc should be summarized in a list. See section VI. Proposal Preparation and Submission Instructions
* Include the text of each question in the Work in Progress section - the text is included in the email notification and should also be visible on the full view of the list of questions and on the reviewer’s view when they are working on a question.
* The Reviewer Assigned Questions page/feature is very good! Like that the Administrator will be able to see all work in progress in one view
* The top level pages of the Document Library and the Document Upload Center need to be anchored to the same point on the upper left of that window to the same point as the other pages so that when you click through the main nav the headers and icons are anchored to the same spot
* All administrators should be able to see all of the projects and manage all documents. They are more like a SuperUser I guess

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1. The admin will need a tool to “upload learning documents” - this is for past RFPs, press releases, new case studies - the Administrator will need to upload these background documents ongoing
2. For the layout of the pages - anchor the header and content tothe same axis at some point in the upper left of the window so when you click through all of the headlines/text/tools line up to the grid.
3. I added myself as a new admin with a new email. Using that ligin I Successfully uploaded the Synovate RFP. The summary was very good and did a good job of capturing the purpose of the RFP. However it did not do any more analysis and It did not go past the summary.
4. Under the new admin the uploaded document did not end up in memory and does not show up on the Dashboard page under Document Library. This was as far as I was able to go with a new admin user.
5. Document Library should contain the RFP that is being worked on as well as the past RFP responses and other training documents. The Admin will be regularly updating the background materials
6. Logged in as [admin@gmail.com](mailto:admin@gmail.com).
7. In Dashboard please call that current section Work in Progress. As noted above to add a second area (we can call that Library) which contains the historic responses and other background training material
8. Went to Team Management and tried to add J-User as a reviewer. It added J-User as “Member”
9. Went into the current RFP in progress. Went to question 2.1 and the list of reviewers did not include J-User

7/17/2025

Feedback on the Loom message from 7/16 -

1. When the AI goes through to identify all of the questions to be answered it should also group them according to the structure of the RFP. The questions in the Loom are from 3.2 and should be grouped 3.2.1 through 3.2.9 to align with the entire section
2. Section 3.1 also contains structured questions that would need to be answered in the response. 3.1.1 - 3.1.5 - These are key detailed answers about “how would you solve our problems” types of questions. We need a double-check the extraction process to get all the questions.
3. The summary is not the right company - it picked Ipsos/Synovate and not Synergetics/Synovate. (The RFP is to launch Synergetics Synovate so there is no info online about the product) Before creating the company summary the AI needs to analyze what is available in the RFP. Each RFP will have some sort of company description or overview. This RFP has a multi-page Section 2.0. Company Background and Overview. The summary and any Company Overview content should be made available to the Gnerator so the responses it creates are more relevant (referring to target market and customer details, industry specifics and other key elements that are surfaced in the review of the web and the information provided by the company in the RFP.
4. A next phase will be capturing and assessing Section 4 “RFP Process.” The Generator should reprocess this key info and report it back to the Admin. NOTE! Key questions and requirements are often hidden in the text. For instance the opening paragraph of Section 3.2 defines two key delivery requirements. If it finds requirements like document type or due date or others it should capture those in the assessment of Section 4 type requirements.. Here is section 3.2 - “Please ensure that your responses are provided in PDF format. Any additional materials you want to include should be provided in an appendix.”

7/14/2025

1. Create a “completion scorecard” for the AI to keep track of the questions it needs to answer and whether or not it has answered them. Review the RFP in its entirety and identify every question that needs to be answered. Organize the questions in a structure that is entirely similar to the way the client has presented it. >> Note the example below from the original Synergetics-Synovate RFP. These deliverables were not mentioned in the draft RFP Response document previously provided by Nilesh.

Promote & Launch:

o Marketing Campaigns: Create a Business-to-Business marketing strategy/campaign for our suite of products, enabling us to generate buzz and attract business.

o Website Content: Create content for a user-friendly and visually appealing website that reflects the brand’s identity and provides information about the product. Our internal team will create the website.

o Print Materials: Design brochures, flyers, and other printed materials that convey the

brand’s message and appeal to the target audience.

o Digital/Presentation Assets: Develop digital assets such as professional presentations for pitches, demo videos, banners, social media graphics, and informative materials that

sales teams can use to communicate your product’s value.

1. Limiting incorrect answers: We need to discuss how to prevent the Generator from making up answers. It must not make up things like case studies or the names of agency staff. How do we limit this?

Does the onboarding process need a detailed checklist that includes name/position/etc of key staff?

Do we need case studies to be received in a certain format?

Checking accuracy - can we use one model to make the answers and another to check for accuracy? Generator should flag recognized gaps or anything that is not 90% sure of accuracy

The main concerns are for the accuracy and the detail of the response.

1. Structuring the response during the working process. As noted in the brief there are multiple reviewers working with their individual parts. Let’s break this apart before we get too much farther along.
2. Reviewers need to have different levels of response options to select - for instance: one paragraph vs. deep dive vs. sentence-and-bullets
3. Structuring the overall response. The RFP Response needs to very closely mirror the structure of the RFP itself. In the Synergetics/Synovate RFP there is a very clear structure. The 9 points in section 3.2 “What Should Your Response Contain” should be specifically answered. The 5 sections in 2.1 “Scope” should be separately answered in significant detail instead of summarized in a list.

Workflow:

1. Pre-work. Administrator uploads into the Agency Library:
2. Historic RFPs - originals and agency responses
3. Case studies
4. Agency fact checklist (staffing, locations, clients, etc)
5. RFP Reviewers / RACI
6. Agency history, background, PR, articles and details
7. Able to review list of documents on the Home Screen

2. These are the basic major steps of the workflow

1. Administrator receives new Original RFP
2. Uploads to system. Initiates review process
3. System performs background intelligence review on the Original RFP issuer and provides Administrator a 1-2 page report about the company and people issuing the RFP (based on web search)
4. System performs a basic assessment of the Original RFP’s top goals, priorities, and problems to solve for the Client. This assessment results in a “Focus Report” that can be used to keep the RFP Response on target.
5. Administrator assess the initial review of the RFP (no response created yet!) The system identifies key gaps or missing areas before attempting to write the response. This means that if the Original RFP asks for PR services and the Agency training materials do not include PR services, the question should be flagged for further review
6. System identifies which Reviewers are responsible for each Question Response and Administrator confirms.
7. Administrator pushes go button and email is sent to each Reviewer with a link to their questions
8. Reviewers work with the chatbot to edit and finalize each assigned Question Response
9. Reviewer marks a question complete when they are done
10. Administrator reviews Dashboard to check and see what Questions are assigned to Reviewers and what Questions have been completed
11. Administrator at any point is able to create a single document that assembles all of the questions in the proper order into a full Word Document version of the response.
12. When all of the Reviewers have completed their work, the Administrator generates the “final version” of the document
13. Once the “final version” is complete, a copy of the RFP Response is stored in the Agency Library for future reference.
14. A final step is provided to the Administrator to report results of the RFP and make comments to assist future responses