

# RFP Response Database

Project Proposal for HCI 573X Spring 2012 by Shaun Kelly ([skelly@iastate.edu](mailto:skelly@iastate.edu))

## Sales Pitch

Many large projects in government, industry, and academia are fulfilled using a competitive bidding process. The requesting organization submits a Request for Proposals (RFP). The RFP provides details describing the scope of the project to be completed and proscribes a required format (outline) for RFP responses. A simple response format might look like:

- Qualifications
- Proposed Solution
- Timeline
- Costs

Any organization wishing to bid on the project must submit a proposal in response to the RFP in the format described in the RFP.

In industries where a competitive bid process is standard, organizations generate many proposals in response to RFPs per year. The contents of each of the response is largely (around 75% in my experience) boilerplate content that is reused from proposal to proposal. Unfortunately, proposals cannot be reused wholesale because the requested outline differs greatly from project to project, some material must be created new specifically for each project, and some material must be customized (for example, replacing the name of the requesting organization in each proposal).

My proposed solution is a web-based RFP response application. The application will let users enter snippets of formatted, boilerplate text independent of any proposal. The users will then be able to generate RFP responses by creating a proposal project and adding and organizing snippets of boilerplate text in any order needed.

## Target Audience

The target audience is proposal development professionals and other people involved in frequently creating RFP responses. Proposal development is a large trade, with most large organizations having several people employed in this function, using within the Sales or Marketing department.

## Demonstrated Need

In my experience in over a decade of technical writing work, I have been involved with numerous projects in which proposal development professionals have sought a better solution allowing them to easily reuse boilerplate text to create proposals. The idea for the project was spurred by one such project request that came in to my company during the first weeks of class.

The usual solution I see is simply copying and pasting boilerplate text from one Word document to another. This doesn't allow changes made by other proposal writers to be reflected throughout all of the documents using the boilerplate. It also makes it difficult to search and find the required

boilerplate text, as you have to know which proposals it was used in. Another solution we recently saw was keeping the boilerplate text in an Excel document. This allowed for slightly improved organization and kept the boilerplate text in one central location; however, it was not easy to search for text or add it to documents, and Excel does not allow for the formatting usually required for proposals.

## Related/Comparable Websites

I'm not aware of related or comparable websites and received no input on this from my peer reviews. There are desktop applications, such as Author it or the DITA XML format, that provide similar functionality, allowing creation of documents based on structured text snippets stored in a database, but not geared specifically towards RFP responses. Author it now provides a web-based application, as well ([www.author-it.com](http://www.author-it.com)).

## Required Functionality

Access control:

- Secure login
- All data only accessible by user that created data

Text snippets and collateral materials:

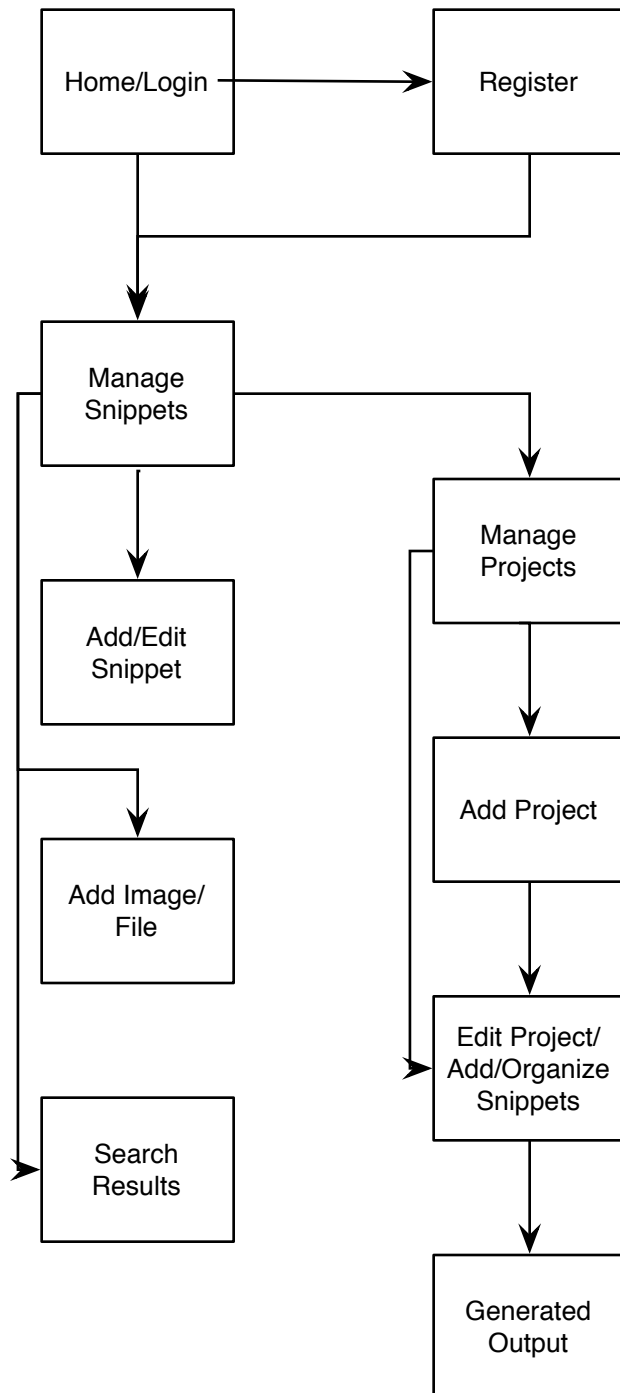
- Create text snippets with title, text, and basic formatting (adding and editing information in a MySQL database).
- Insert variable into text snippets (for example \$companyname and \$proposalrequestor, allowing you to create text snippets more easily reused across such as: "\$companyname will provide a robust widget solution for \$proposalrequestor using the requirements generated by \$proposalrequestor).
- Tag text snippets with keywords, linking a keyword table to the snippets table.
- Search text snippets by content and keyword.
- Spell check (using an existing library if available; may not be necessary for 1.0 because browsers all have spell check now).
- Upload additional collateral to be included in proposal (images, PDF attachments).

Proposal project creation:

- Create proposal project.
- Add text snippets to proposal project.
- Create table of contents for proposal project by ordering text snippets and putting snippets in a hierarchy.
- Generate proposal containing all text in table of contents that can be exported to a usable format.

## Information Flow

The following shows the basic information flow for the application:



# Mockups

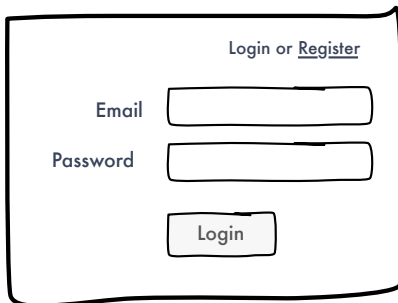
The following sections show mockups of the main screens of the application.

## Login Screen and Register Screen

These are the login and registration screens.

### RFP Responder

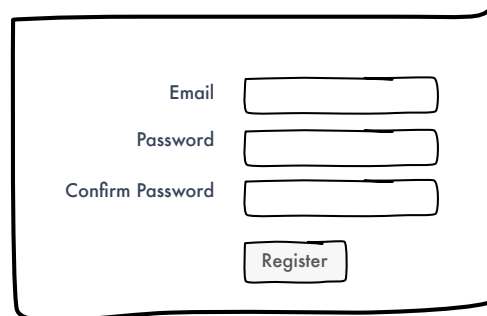
#### Login



A hand-drawn wireframe of a login screen. At the top right, it says "Login or [Register](#)". Below this, there are two input fields: the first is labeled "Email" and the second is labeled "Password". At the bottom center, there is a button labeled "Login".

### RFP Responder

#### Register



A hand-drawn wireframe of a register screen. It features three input fields: "Email", "Password", and "Confirm Password". At the bottom center, there is a button labeled "Register".

## Manage Snippets

This page provides the list of boilerplate text snippets. Click the snippet name to edit or click Add Snippet or Image to add new data. Use the search field to search by text or keywords.

# RFP Responder



## Snippets

Add Snippet

Add Image

Search Snippets

Go

[Snippet Name](#)  
Snippet description. Lorem ipsum dolor sit amet, consectetur adipiscing elit. Mauris id leo dolor, et consectetur sapien.

[Snippet Name](#)  
Snippet description. Lorem ipsum dolor sit amet, consectetur adipiscing elit. Mauris id leo dolor, et consectetur sapien.

[Snippet Name](#)  
Snippet description. Lorem ipsum dolor sit amet, consectetur adipiscing elit. Mauris id leo dolor, et consectetur sapien.

<< < 1 2 3 4 5 6 7 ... 16 > >>

## Add Snippets and Add Image

These screens allow you to add a snippet of boilerplate or a collateral image.

# RFP Responder



## Add Snippet

Title

Body

Insert Variable

Insert

Keywords

Add

[Cancel](#)

# RFP Responder



## Add Image

Title

File

   
 [Cancel](#)

## Manage Projects

This screen provides the list of projects. Click a project to edit or click Add Project to create a new one.

## RFP Responder



### Projects

Add Project

[Project Name](#)  
Project description. Lorem ipsum dolor sit amet, consectetur adipiscing elit. Mauris id leo dolor, et consectetur sapien.

[Project Name](#)  
Project description. Lorem ipsum dolor sit amet, consectetur adipiscing elit. Mauris id leo dolor, et consectetur sapien.

## Add Project

This screen allows you to add a project.

# RFP Responder



## Add Project

Title

Description

 [Cancel](#)

## Edit Project

This screen allows the user to add snippets to a proposal and set the order and hierarchy for the table of contents.

## RFP Responder



### Project Name

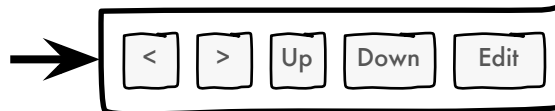
[Edit Name/Description](#)

Project description. Lorem ipsum dolor sit amet, consectetur adipiscing elit. Ut dapibus dignissim...

### Table of Contents

Create Output

- Overview
- Sales Points
- > **Awesome Things**
- > Features
- >> Good Features
- >> Useless Features
- Pricing
- Conclusion



Add Snippet

### Variables

Variable

Defintion

Save