



VisibleThread

BUYER'S GUIDE · RFP SOFTWARE

The Buyer's Guide to RFP Software

A practical framework for evaluating solutions for modern Pursuit Operations, from understanding the market to building the business case.

01 Understand the market

02 Explore your options

03 Evaluate & compare

04 Plan for success

05 Make the case

Contents

The guide follows the five stages of an RFP software decision. Jump to any stage; the header tracks where you are.

01 Understand the market

01	From RFP response to Pursuit Operations	6
----	---	---

02	Today's software landscape	7
----	----------------------------	---

03 Evaluate & compare

04	Define your requirements	14
----	--------------------------	----

05	The capabilities that matter	17
----	------------------------------	----

06	Common buying mistakes	21
----	------------------------	----

07	Vendor evaluation scorecard	23
----	-----------------------------	----

KIT	The RFP question bank	26
-----	-----------------------	----

08	Total cost of ownership (TCO)	28
----	-------------------------------	----

09	Evaluating vendor viability	30
----	-----------------------------	----

02 Explore your options

03	Build, assemble, or buy?	10
----	--------------------------	----

04 Plan for success

10	The implementation journey	33
----	----------------------------	----

11	Is your organization ready?	35
----	-----------------------------	----

05 Make the case

12	Building the business case	39
----	----------------------------	----

13	Final buyer's checklist	43
----	-------------------------	----

EXECUTIVE SUMMARY

Choose the platform that fits how you win business

Proposal teams face rising pressure to deliver more winning responses in less time, while meeting growing expectations for quality, compliance, and collaboration. The market has expanded rapidly, giving organizations more choice, and more complexity, than ever before.

Modern platforms are expected to connect business development, capture, proposal, legal, contracts, and subject matter experts across the entire pursuit lifecycle. This is a connected operating model we call **Pursuit Operations**. AI is part of that story, but only one part.

Inside this guide, you'll learn how to:

- 1 Understand today's RFP software market
- 2 Decide whether to build, assemble, or buy
- 3 Define your organization's requirements
- 4 Evaluate the capabilities that matter most

37%

INDUSTRY INSIGHT

RFPs influence an average of 37% of company revenue, showing that proposal operations have become a critical business function rather than an administrative process.

Source: APMP, 2025 RFP Response Trends & Benchmarks Report

BEFORE YOU BEGIN

How to run this evaluation

A repeatable path from first conversation to confident decision. Each step maps to a stage of this guide and names who typically leads it.

SIX STEPS

WHO LEADS · WHERE TO READ

1	Align the team Agree goals, scope, and who is involved.	Exec sponsor and all stakeholders CHAPTERS 01-02
2	Define requirements Set outcomes and Must / Should / Nice priorities.	Proposal ops CHAPTERS 03-04
3	Shortlist Map the market and narrow to a credible few.	Evaluation team CHAPTERS 04-05
4	Demo & score Run consistent demos against the scorecard.	All stakeholders CHAPTERS 05-07
5	Prove it Validate fit with a scoped proof of concept.	Proposal + IT CHAPTERS 08-09
6	Decide Build the business case and choose.	Exec sponsor CHAPTERS 10-13

THE BOTTOM LINE

The right RFP software is the solution that best supports your organization's people, processes, governance, and pursuit objectives, not simply the one with the most features or the newest AI.

01

STAGE ONE

Understand the market

Before comparing products, understand why the category exists, how it has changed, and what kinds of solutions are available.

WHY THIS STAGE MATTERS

You can't compare products you don't understand. This stage builds the shared vocabulary your evaluation team needs before a single demo.

IN THIS STAGE

- 01 From RFP response to Pursuit Operations
- 02 Today's software landscape

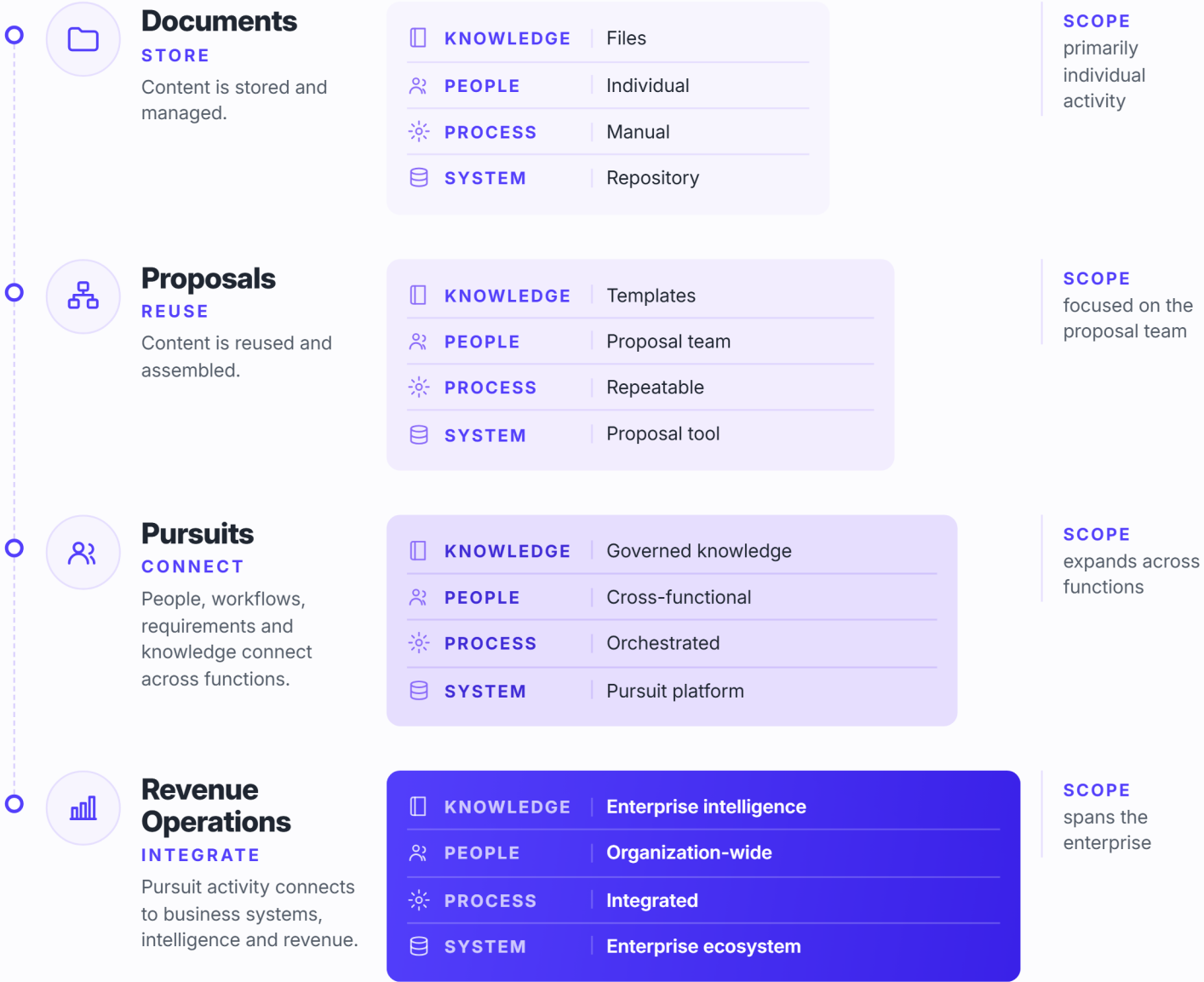
BY THE END, YOU'LL BE ABLE TO

- Explain why the category has changed
- Recognize the five types of solution
- Frame the right first question for your team

THE PURSUIT OPERATIONS MODEL

From managing content to operating the pursuit

The evolution of proposal technology is not simply about better RFP response. It is about expanding the operating model around how organizations pursue and win business.



The operating model expands from managing content to connecting the people, knowledge, processes and systems required to pursue and win business.

Technology should evolve with the operating model, not simply automate the existing process.

27%

INDUSTRY INSIGHT

27% of the average workday is spent searching for information, more than employees spend creating new work.

Source: Microsoft, *Work Trend Index*

Today's software landscape

The market spans five broad categories, from general-purpose AI assistants to end-to-end RFP software platforms. Each solves a different problem. The first question isn't "which product has the most features?" but "which type of solution fits how we pursue and win business?"

01

General AI tools

INDIVIDUAL PRODUCTIVITY

Generate and summarize content, answer questions, and assist with research.

BEST FIT

Exploring AI or supplementing existing processes.

STRENGTHS

Fast, flexible, low barrier to entry; improves individual productivity.

WATCH FOR

Not purpose-built; limited governance; needs human validation; no pursuit workflows.

02

Proposal writing assistants

PROPOSAL DRAFTING

Accelerate proposal drafting and improve response quality.

BEST FIT

Teams looking to improve proposal efficiency.

STRENGTHS

Faster first drafts, content suggestions, writing assistance.

WATCH FOR

Focused primarily on creation; limited lifecycle support.

03

Content management systems

KNOWLEDGE STORAGE

Store, organize, and retrieve approved content.

BEST FIT

Organizations with mature content libraries.

STRENGTHS

Centralized knowledge, version control, reusable content.

WATCH FOR

Limited workflow, capture support, and lifecycle collaboration.

04

Proposal management platforms

PROPOSAL EXECUTION

Manage proposal planning, collaboration, compliance, and submission.

BEST FIT

Organizations with dedicated proposal teams.

STRENGTHS

Structured workflows, reviews, task management, compliance support.

WATCH FOR

Often focused on proposal execution rather than the full pursuit.

05

End-to-End RFP platforms

FULL PURSUIT LIFECYCLE

Connect business development, capture, proposal, contracts, knowledge and AI across the lifecycle.

BEST FIT

Standardizing and scaling pursuit operations.

STRENGTHS

Shared workflows, governance, collaboration, AI, analytics, compliance, and lifecycle visibility.

WATCH FOR

Broader implementation and organizational change may be required.

Choosing between the categories

15-SEC
ANSWER

Five categories solve five different problems. Match the type of solution to how you pursue, not to feature counts.

65%

INDUSTRY INSIGHT

65% of organizations now use dedicated RFP response software, reflecting sustained investment in proposal quality, efficiency, and collaboration.

Source: APMP, 2025 RFP Response Trends & Benchmarks Report

QUESTIONS TO CONSIDER

- ? Are you solving a proposal-writing problem or a broader pursuit challenge?
- ? Which teams need to collaborate throughout the lifecycle?
- ? Is AI your primary requirement, or one capability within a platform?
- ? Do you need a standalone tool or one that integrates with your ecosystem?
- ? How important are governance, compliance, security, and auditability?
- ? Will the solution support your needs over the next three to five years?

EXPERT TIP

AI is an important capability, but it shouldn't be the primary selection criterion. Evaluate how AI fits within a broader platform that supports governance, workflow, compliance, and knowledge management.

KEY TAKEAWAY

Every category has a role, but they solve different problems. The best choice depends on your operational maturity, collaboration needs, governance requirements, and long-term strategy, not the number of AI features.

02

STAGE TWO

Explore your options

Every organization takes one of three paths to proposal technology: **build, assemble, or buy.**

WHY THIS STAGE MATTERS

This choice shapes cost, speed, and risk more than any single feature. Decide the path before you shortlist vendors.

IN THIS STAGE

03 Build, assemble, or buy?

BY THE END, YOU'LL BE ABLE TO

- Weigh the three approaches against your priorities
- Match an approach to your operational maturity
- Narrow the field before demos begin

Build, assemble, or buy?

15-SEC
ANSWER

Three legitimate approaches. The question is not which is best, but which fits your requirements, resources and operating model.

Some organizations develop a custom solution, others combine enterprise and specialist tools, and many implement a purpose-built platform. Each path carries a different balance of control, effort and ownership.

A Build Develop and maintain a custom RFP software platform.

BEST WHEN YOU NEED

- Maximum control
- Highly differentiated workflows
- Significant internal engineering capability
- Ownership of the long-term roadmap

MAIN CHALLENGE

You also own the development, maintenance, integration, security and ongoing evolution.

COSTS BEYOND THE HEADLINE

Internal engineering, maintenance, integration, security, upgrades

B Assemble Integrate multiple enterprise and specialist tools into a connected ecosystem.

BEST WHEN YOU NEED

- Flexibility
- Existing enterprise investments preserved
- Rapid adoption of specialist capabilities
- Freedom to compose your own ecosystem

MAIN CHALLENGE

You also own the complexity of connecting, governing and maintaining multiple systems.

COSTS BEYOND THE HEADLINE

Integration, duplicated functionality, administration, data synchronization, governance

C Buy Implement a purpose-built RFP software platform.

BEST WHEN YOU NEED

- Purpose-built workflows
- Faster deployment
- A supported product roadmap
- A more standardized operating model

MAIN CHALLENGE

You accept the capabilities, roadmap, architecture and constraints of the selected vendor.

COSTS BEYOND THE HEADLINE

Implementation, migration, integration, training, support, internal adoption

Comparing the trade-offs

Directional comparisons, not absolute truths: every dimension below depends on your architecture, your internal capacity and the vendor or tools you select.

EVALUATION DIMENSION	A Build	B Assemble	C Buy
Control	High	Medium	Medium
Customization	High	Medium	Medium
Time to value	Slow	Fast–moderate	Moderate–fast
Integration effort	High	High	Lower–moderate
Internal resources	High	Medium	Lower
Governance	Organization-owned	Distributed	Vendor-supported
Maintenance	Organization-owned	Shared across tools	Vendor-supported
Long-term flexibility	High	High	Medium
Predictability of cost	Lower	Lower	Higher
Scalability	Organization-dependent	Architecture-dependent	Vendor/product-dependent

No approach is favorable on every dimension. Read the table as a set of trade-offs to weigh against your own constraints, and note that the headline cost of each approach is never its full cost.

Which approach fits us?

The right question isn't "which is best?" It is which approach best fits our requirements, resources, operating model and long-term strategy.

Requirements

How differentiated are your needs?

Resources

How much engineering and operational capacity can you commit?

Time to value

How quickly do you need the solution operating?

Long-term ownership

Who will maintain, govern, integrate and evolve the environment?

DIRECTIONAL QUESTIONS

Do you need highly differentiated functionality that you cannot reasonably obtain from a commercial platform?

Yes → consider Build

No → continue below

Do you already have a strong enterprise technology ecosystem and want to compose capabilities from multiple tools?

Yes → consider Assemble

No → consider Buy

These are directional questions, not prescriptive rules. Most organizations should evaluate all three approaches against their requirements and constraints.

EXPERT TIP

Many organizations underestimate the long-term cost of maintaining custom-built solutions or managing multiple disconnected tools. Weigh ongoing administration, integration and governance, not just implementation.

KEY TAKEAWAY

There is no universally right approach. Build offers control, Assemble offers composability, and Buy offers a supported, purpose-built environment. The right choice reflects your requirements, resources, operating model and long-term strategy.

03

STAGE THREE Evaluate & compare

The heart of the decision, where you define success, agree what matters, and compare vendors on a single, consistent framework.

WHY THIS STAGE MATTERS

Most evaluations go wrong by comparing features instead of solving problems. A shared framework keeps the decision objective.

IN THIS STAGE: SIX CHAPTERS

04 Define your requirements

06 Common buying mistakes

08 Total cost of ownership

05 The capabilities that matter

07 Vendor evaluation scorecard

09 Evaluating vendor viability

The payoff: score every vendor on the same scale, separate must-haves from nice-to-haves, and understand the true cost, and the true partner.

Define your requirements

15-SEC
ANSWER

Define business outcomes and priorities before demos, or the demos will quietly define them for you.

The success of a proposal technology initiative is decided long before the first vendor demo. Teams that start with clear business objectives select better solutions; teams that start with demos end up comparing features instead of solving problems.

25
HOURS / RFP

INDUSTRY INSIGHT

Proposal teams spend an average of 25 hours preparing each RFP response, underlining the value of automation, content management, and streamlined workflows.

Source: APMP, 2025 RFP Response Trends & Benchmarks Report

1 · START WITH BUSINESS OUTCOMES

Technology should support measurable business goals, not simply replace existing tools.

BUSINESS CHALLENGE		DESIRED OUTCOME
Manual proposal development	→	Increase productivity and reduce effort
Difficulty finding trusted content	→	Improve knowledge reuse and consistency
Limited collaboration across teams	→	Connect the pursuit lifecycle
Compliance risk	→	Improve governance and traceability
Limited visibility into pursuits	→	Increase reporting and operational insight
Disconnected systems	→	Streamline workflows and reduce duplication

Stakeholders and priorities

2 · IDENTIFY YOUR STAKEHOLDERS

Proposal technology affects far more than proposal teams. A cross-functional evaluation team ensures the platform meets operational, technical, and business requirements.

WIN THE WORK

- Business development
- Capture
- Executive sponsors

BUILD THE RESPONSE

- Proposal management
- Proposal writers
- Subject matter experts

GOVERN & ENABLE

- Legal & contracts
- IT & security
- Procurement

3 · PRIORITIZE YOUR REQUIREMENTS

Not every feature has equal importance. A simple prioritization keeps vendor evaluations focused on what matters most. Use this as a starting point and adjust to your organization.

Must have5	Should have4	Nice to have3
End-to-end pursuit lifecycle support	AI-assisted proposal development	Mobile access
Microsoft 365 integration	Capture planning	Offline working
Content and knowledge management	Contract analysis	Industry-specific templates
Collaboration and workflow automation	Advanced analytics and dashboards	
Governance and compliance		

Requirements checklist

WORKSHEET

Before issuing an RFP or evaluating vendors, confirm you have:

- ☐ Defined the business problems you're solving
- ☐ Identified all stakeholder groups
- ☐ Documented security, governance & compliance needs
- ☐ Identified required integrations
- ☐ Prioritized as Must / Should / Nice to have
- ☐ Defined measurable success criteria

DEFINE SUCCESS BEFORE YOU BUY

Reduced development time

Increased content reuse

Better collaboration

Fewer compliance issues

Higher proposal throughput

Higher win rates

Improved adoption

Return on investment

EXPERT TIP

Agree your evaluation criteria *before* attending vendor demos. It keeps product presentations from quietly reshaping your priorities, and keeps the evaluation objective.

The capabilities that matter

15-SEC
ANSWER

Score capability fit across the lifecycle. For each, know what "good" looks like and the red flags.

Rather than comparing feature lists, assess how well each solution supports your pursuit processes and governance requirements. For each capability, know what good looks like, and the red flags that signal a poor fit. Use these during demos, RFP responses, and proof-of-concept exercises.

83%

INDUSTRY INSIGHT

83% of organizations now use a formal Go/No-Go process to qualify opportunities before responding, a sign of the growing maturity of proposal operations and structured decision-making.

Source: APMP, 2025 RFP Response Trends & Benchmarks Report

A

Find & qualify the work

CAPABILITIES 01-02

01

Opportunity management & qualification

Successful pursuits begin before proposal development: identify, qualify, prioritize, and track opportunities.

WHAT GOOD LOOKS LIKE

✓ Standardized qualification workflows

✓ Clear opportunity visibility

✓ CRM integration & dashboards

RED FLAGS

✗ Opportunities tracked outside the platform

✗ Duplicate data entry

✗ Limited reporting

02

Capture planning

Aligns teams before proposal development begins, improving strategy, engagement, and win probability.

WHAT GOOD LOOKS LIKE

✓ Integrated capture workflows

✓ Shared pursuit intelligence

✓ Reusable capture knowledge

RED FLAGS

✗ Capture plans in separate documents

✗ No link between capture and proposal

17

Develop the winning response

B Draft, review & approve

CAPABILITIES 03–06

03 Proposal development

Should improve productivity while maintaining quality, consistency, and compliance.

WHAT GOOD LOOKS LIKE

- ✓ Collaborative authoring
- ✓ Review workflows & version control
- ✓ Task management

RED FLAGS

- ✗ Email-based reviews
- ✗ Multiple document versions
- ✗ Manual status tracking

04 Content & knowledge management

Trusted content improves consistency, reduces effort, and lets teams reuse organizational knowledge.

WHAT GOOD LOOKS LIKE

- ✓ Centralized content repository
- ✓ Metadata and search
- ✓ Content governance & analytics

RED FLAGS

- ✗ Multiple content libraries
- ✗ Poor search
- ✗ No ownership or review process

05 Compliance, requirements & contract analysis

Compliance failures can eliminate a strong proposal, and contractual obligations are easier to meet when they surface early.

WHAT GOOD LOOKS LIKE

- ✓ Automated requirement extraction
- ✓ Compliance tracking & review workflows
- ✓ Contract obligations traced to source, reviewed by a person

RED FLAGS

- ✗ Manual compliance tracking
- ✗ No audit trail
- ✗ Difficult change management
- ✗ Contract findings with no source or workflow

06 Collaboration & workflow

Proposal development is a team effort involving multiple departments and contributors.

WHAT GOOD LOOKS LIKE

- ✓ Configurable workflows
- ✓ Notifications & role-based permissions
- ✓ Task visibility

RED FLAGS

- ✗ Heavy reliance on email
- ✗ Limited workflow automation
- ✗ Poor visibility into progress

Apply AI, and run it as an operation

C Apply AI with confidence

CAPABILITY 07

07 AI capabilities

EVALUATE CAREFULLY

AI can lift productivity across pursuit operations, but its value depends on accuracy, transparency, governance, and trust. Don't let AI be the primary selection criterion; evaluate how it fits within a broader, governed platform.

WHAT GOOD LOOKS LIKE

- ✓ Grounded in trusted enterprise content
- ✓ Explainable responses with source references
- ✓ Full traceability & role-based governance
- ✓ Prompt management, usage analytics & audit logs

RED FLAGS

- ✗ Trained on unknown sources
- ✗ No citations or traceability
- ✗ Limited governance
- ✗ No control over prompts or generated content

D Run it as an operation

CAPABILITIES 08–09

08 Reporting & analytics

Visibility into pursuit performance, resource utilization, and operational effectiveness.

WHAT GOOD LOOKS LIKE

- ✓ Real-time dashboards
- ✓ Custom reporting & KPI tracking
- ✓ Executive visibility

RED FLAGS

- ✗ Static reports
- ✗ Limited filtering
- ✗ No operational insights

09 Integration

Proposal technology should complement, not replace, your existing business systems.

WHAT GOOD LOOKS LIKE

- ✓ Standard integrations
- ✓ Open APIs & reliable sync
- ✓ Minimal manual data entry

RED FLAGS

- ✗ Custom work for common systems
- ✗ Duplicate data
- ✗ Limited API support

Secure it, govern it, scale it

E Enterprise readiness

CAPABILITIES 10–12

10 Security & deployment

Proposal platforms manage sensitive business information and must meet enterprise security requirements.

WHAT GOOD LOOKS LIKE

- ✓ Strong identity & access management
- ✓ Encryption at rest and in transit
- ✓ Audit logging & recognized standards

RED FLAGS

- ✗ Limited security documentation
- ✗ Weak access controls
- ✗ No audit capabilities

11 Governance

Keeps content, workflows, AI, and user activity consistent, compliant, and auditable.

WHAT GOOD LOOKS LIKE

- ✓ Role-based permissions
- ✓ Configurable approval workflows
- ✓ Complete audit trails & policy enforcement

RED FLAGS

- ✗ Limited administrative controls
- ✗ No approval workflows
- ✗ Poor auditability

12 Scalability

The platform should support future growth without requiring major rework.

WHAT GOOD LOOKS LIKE

- ✓ Enterprise-scale architecture
- ✓ Configurable workflows & global teams
- ✓ Continuous product innovation

RED FLAGS

- ✗ Performance limitations
- ✗ Difficult administration
- ✗ Heavy customization to grow

Common buying mistakes

**15-SEC
ANSWER**

Most evaluations fail the same six ways: buying for AI, buying point tools, or choosing features over adoption.

Every organization is different, but purchasing decisions tend to fail in the same six ways. Recognizing them early improves your odds of a successful implementation.

01 Buying for AI instead of business outcomes

Selecting a platform on AI features before defining the business problems it must solve.

WHY IT MATTERS

The best solutions combine AI with strong workflows, governance, collaboration, and knowledge management. AI should enhance operations, not justify the purchase.

HOW TO AVOID IT

- ▶ Define objectives before evaluating AI features
- ▶ Assess how AI supports real pursuit workflows
- ▶ Weigh governance, explainability & traceability

02 Choosing point solutions over connected workflows

Buying individual tools for isolated problems without considering the whole lifecycle.

WHY IT MATTERS

Disconnected systems lead to duplicated effort, fragmented information, inconsistent governance, and added integration cost.

HOW TO AVOID IT

- ▶ Map your pursuit lifecycle before evaluating
- ▶ Consider how information flows between teams
- ▶ Evaluate lifecycle support, not isolated features

03 Ignoring governance and compliance

Treating governance as an administrative concern rather than a core evaluation criterion.

WHY IT MATTERS

Teams manage sensitive, regulated content and increasingly AI-generated output. Weak governance introduces compliance risk and erodes confidence in quality.

HOW TO AVOID IT

- ▶ Evaluate approval workflows and audit capabilities
- ▶ Assess role-based permissions & content governance
- ▶ Ensure AI activity is transparent and traceable

Mistakes that surface after you buy

04 Underestimating implementation & change management

Assuming that purchasing software is the same as successfully implementing it.

WHY IT MATTERS

Technology delivers value only when users adopt new ways of working. Planning, training, governance, and executive sponsorship are critical.

HOW TO AVOID IT

- ▶ Develop an implementation roadmap
- ▶ Allocate time for training and change management
- ▶ Define ownership and governance from the outset

05 Focusing on features instead of user adoption

Comparing lengthy feature lists without considering how easily teams can use the platform.

WHY IT MATTERS

The most feature-rich platform won't deliver outcomes if it's hard to learn or doesn't fit established workflows.

HOW TO AVOID IT

- ▶ Evaluate usability alongside functionality
- ▶ Include representative users in demos and pilots
- ▶ Consider day-to-day work across roles

06 Failing to involve all stakeholders

Limiting the evaluation to proposal teams or IT without the wider pursuit community.

WHY IT MATTERS

Pursuit operations span many functions. Decisions made without key stakeholders lead to poor adoption and unmet requirements.

HOW TO AVOID IT: INCLUDE

Business development

Capture

Proposal management

Legal & contracts

IT & security

Procurement

Executive sponsors

KEY TAKEAWAY

Successful selection is about more than the most features or the newest AI. Organizations that define clear outcomes, involve the right stakeholders, evaluate the full lifecycle, and plan for implementation achieve lasting value.

Vendor evaluation scorecard

15-SEC
ANSWER

Use a consistent 1, 3, or 5 scale for every vendor, weighted by priority, backed by evidence, not demo impressions.

A practical framework for comparing solutions against the capabilities that matter most. Score every vendor on the same scale to keep the comparison objective and build stakeholder consensus.

HOW TO USE THIS SCORECARD

1. Define your business requirements before engaging vendors.
2. Set each area's priority: Must / Should / Nice to have.
3. Use a consistent 1, 3, or 5 scale for every vendor.
4. Record evidence from demos, RFPs, POCs & references.
5. Review results with stakeholders before deciding.

SCORING SCALE

- 1 Does not meet requirement
- 3 Partially meets requirement
- 5 Fully meets or exceeds requirement

Scorecard worksheet

COMPLETE THIS SCORECARD

Evaluator Team

Date

PRIORITY: MUST / SHOULD / NICE · USE A CONSISTENT 1, 3, OR 5 SCALE FOR EVERY VENDOR

CRITERIA 01-09 · CONTINUED OVERLEAF

EVALUATION AREA	WHY IT MATTERS	PRIORITY	VENDOR A	VENDOR B	VENDOR C
Lifecycle coverage	Supports the end-to-end pursuit lifecycle				
Opportunity qualification	Helps identify, assess, and prioritize opportunities				
Capture support	Enables structured capture planning and pursuit strategy				
Proposal development	Improves collaboration, productivity, and quality				
Content & knowledge management	Promotes reuse of trusted organizational knowledge				
Compliance, requirements & contracts	Improves compliance and surfaces contractual risk early				
Collaboration & workflow	Connects teams and automates key processes				
AI capabilities	Delivers trusted, explainable, and governed AI				
Reporting & analytics	Provides operational visibility and performance insight				

Scorecard worksheet: criteria 10–14

PRIORITY: MUST / SHOULD / NICE · USE A CONSISTENT 1, 3, OR 5 SCALE FOR EVERY VENDOR

CRITERIA 10–14

EVALUATION AREA	WHY IT MATTERS	PRIORITY	VENDOR A	VENDOR B	VENDOR C
Integration	Connects with existing enterprise systems				
Security & deployment	Meets enterprise security, compliance, and deployment needs				
Governance	Supports approvals, auditability, and policy enforcement				
Scalability	Supports future growth and evolving business needs				
Vendor support & implementation	Helps ensure successful deployment, adoption, and success				
Weighted total	Apply higher weights to Must-have criteria before totaling vendor scores.				

EXPERT TIP

Use the same criteria for every vendor and involve business, IT, procurement, and executive leadership. Consistent scoring reduces bias and improves decision quality.

LOOK BEYOND THE DEMO: ASK YOURSELF

- Does it support our end-to-end pursuit lifecycle?
- Is its AI transparent, traceable, and grounded?
- Will it integrate with our existing ecosystem?
- Can it scale as our requirements evolve?

The RFP question bank

Ready-to-paste questions, grouped by capability, for your RFI, RFP, or demo script. Drop the groups that matter into your template and ask every vendor the same set.

01 Lifecycle & fit

- › Which stages of the pursuit lifecycle does the platform support natively?
- › How does information flow from opportunity and capture into the proposal?
- › Which capabilities are standard configuration versus custom development?

03 Compliance, requirements & contracts

- › Can compliance matrices be generated automatically from a solicitation?
- › How are requirement changes tracked and propagated through the response?
- › What audit trail exists for compliance decisions and sign-offs?
- › Can the platform analyze contracts and identify key obligations or terms?
- › Can users trace a contract finding back to its source language?
- › Can contract requirements be connected to proposal requirements?

02 Content & knowledge

- › How is approved content stored, searched, and reused across pursuits?
- › How is outdated content identified, reviewed, and retired?
- › Who owns content governance, and how are approvals enforced?

04 Collaboration & workflow

- › Can multiple contributors work simultaneously, and how are reviews coordinated?
- › Can workflows, roles, and permissions be configured without custom code?
- › How are tasks assigned, tracked, and escalated when deadlines slip?

AI, integration & partnership

05 AI & trust

- › Is AI grounded in our approved content, or a general-purpose model?
- › Can every AI-generated response be traced back to its source?
- › What governance, prompt controls, and audit logs apply to AI use?

06 Integration & security

- › Which enterprise systems integrate out of the box versus custom effort?
- › What deployment models, certifications, and data-residency options exist?
- › How are identity, access control, and encryption handled?

07 Implementation & partnership

- › What implementation methodology and timeline are typical for teams like ours?
- › What resources must we provide, and what does the vendor provide?
- › What training, support, and customer-success are included after go-live?
- › Can you share the product roadmap, reference customers, and financial stability?

Total cost of ownership (TCO)

15-SEC
ANSWER

The lowest price is rarely the lowest cost. Weigh implementation, integration, training, and admin over time.

The purchase price is only one part of the investment. Organizations that compare on licensing alone overlook implementation, integration, training, and ongoing costs that shape long-term value. Understanding total cost of ownership (TCO) lets you compare fairly and build a realistic business case.

THE EIGHT COMPONENTS OF TCO

01 Software licensing

Subscription fees, licensing model, user growth, and optional modules.

02 Implementation

Project planning, configuration, onboarding, and deployment services.

03 Integration

Connecting CRM, Microsoft 365, SharePoint, DMS, and identity providers.

04 Data migration

Migrating proposal content, templates, knowledge, and historical information.

05 Training & change management

User and admin training, communications, and adoption activities.

06 Support & customer success

Technical support, customer success programs, and professional services.

07 Administration & maintenance

Platform administration, governance, user management, and configuration.

08 Internal resources

Time from IT, proposal teams, business owners, and executive sponsors.

Where the real cost sits

THE HIDDEN TRADE-OFF

The lowest-priced solution is rarely the lowest-cost investment.

A lower subscription often requires:

- + Extensive custom development
- + Manual integrations
- + Higher administrative effort
- + Additional third-party software
- + Greater dependence on internal IT
- + Longer implementation timelines

WEIGH COST AGAINST VALUE

Every cost has a corresponding return. Assess both together.

COST CONSIDERATION	VALUE CONSIDERATION
Software subscription	Increased productivity
Implementation services	Faster time to value
Integration effort	Reduced manual work
Training investment	Higher user adoption
Administration	Stronger governance & compliance
Internal resource commitment	Improved collaboration & efficiency
Ongoing support	Continuous improvement, lower risk

ASK VENDORS TO EXPLAIN

- What implementation services are included?
 - How is existing content and knowledge migrated?
 - What level of ongoing support is included?
 - How are updates and new features delivered?
- Which integrations are out of the box vs extra effort?
 - What training is provided for admins and end users?
 - What internal resources will we need to commit?
 - What costs should we expect over the lifetime?

Evaluating vendor viability

15-SEC
ANSWER

You're choosing a long-term partner. Weigh roadmap, references, and support alongside the product itself.

Selecting RFP software is choosing a technology partner. The vendor's financial stability, expertise, product strategy, and ability to support you over time can matter as much as the product itself.

EIGHT AREAS TO EVALUATE

Financial stability

A healthy vendor can keep investing in product, support, and long-term success.

Product roadmap

Planned enhancements show whether the platform will meet future needs.

Customer base

An established, growing community signals market adoption and maturity.

Industry expertise

Sector experience means they understand your operational and regulatory needs.

Implementation experience

Proven methodologies reduce project risk and accelerate time to value.

Partner ecosystem

Technology and consulting partners extend capability and support complex work.

Customer success & support

Effective onboarding and support improve adoption and lasting success.

Innovation

Regular enhancements show continued investment and responsiveness.

Reading the signals

SIGNS OF A STRONG PARTNER

- ✓ A clear long-term product vision
- ✓ Regular product enhancements
- ✓ Proven implementation experience
- ✓ Strong customer references
- ✓ Responsive customer support
- ✓ An established partner ecosystem
- ✓ Transparent communication

POTENTIAL WARNING SIGNS

- ✗ Limited product roadmap visibility
- ✗ Few customer references
- ✗ Heavy reliance on custom development
- ✗ Limited implementation resources
- ✗ Infrequent product updates
- ✗ Weak support or customer success

QUESTIONS TO ASK EVERY VENDOR

COMPANY

- ? How long have you been serving proposal and pursuit teams?
- ? What industries and organization sizes do you support?
- ? Can you provide references relevant to our business?

PRODUCT

- ? How frequently are new capabilities released?
- ? What does your product roadmap look like?
- ? How do customer requests influence development?

CUSTOMER SUCCESS

- ? What implementation methodology do you follow?
- ? What onboarding and training is included?
- ? How do you measure customer success?

ECOSYSTEM

- ? Which enterprise platforms do you integrate with?
- ? Do you work with implementation partners?
- ? How do you support complex deployments?

KEY TAKEAWAY

Choosing the right software also means choosing the right long-term partner. Evaluating vendor viability alongside product capability reduces implementation risk and supports long-term success.

04

STAGE FOUR Plan for success

Selecting the right platform is a milestone, not the finish line. Value comes from planning, adoption, and readiness.

WHY THIS STAGE MATTERS

The best platform delivers nothing without adoption. Plan the rollout before you sign, not after.

IN THIS STAGE

10 The implementation journey

11 Is your organization ready?

BY THE END, YOU'LL BE ABLE TO

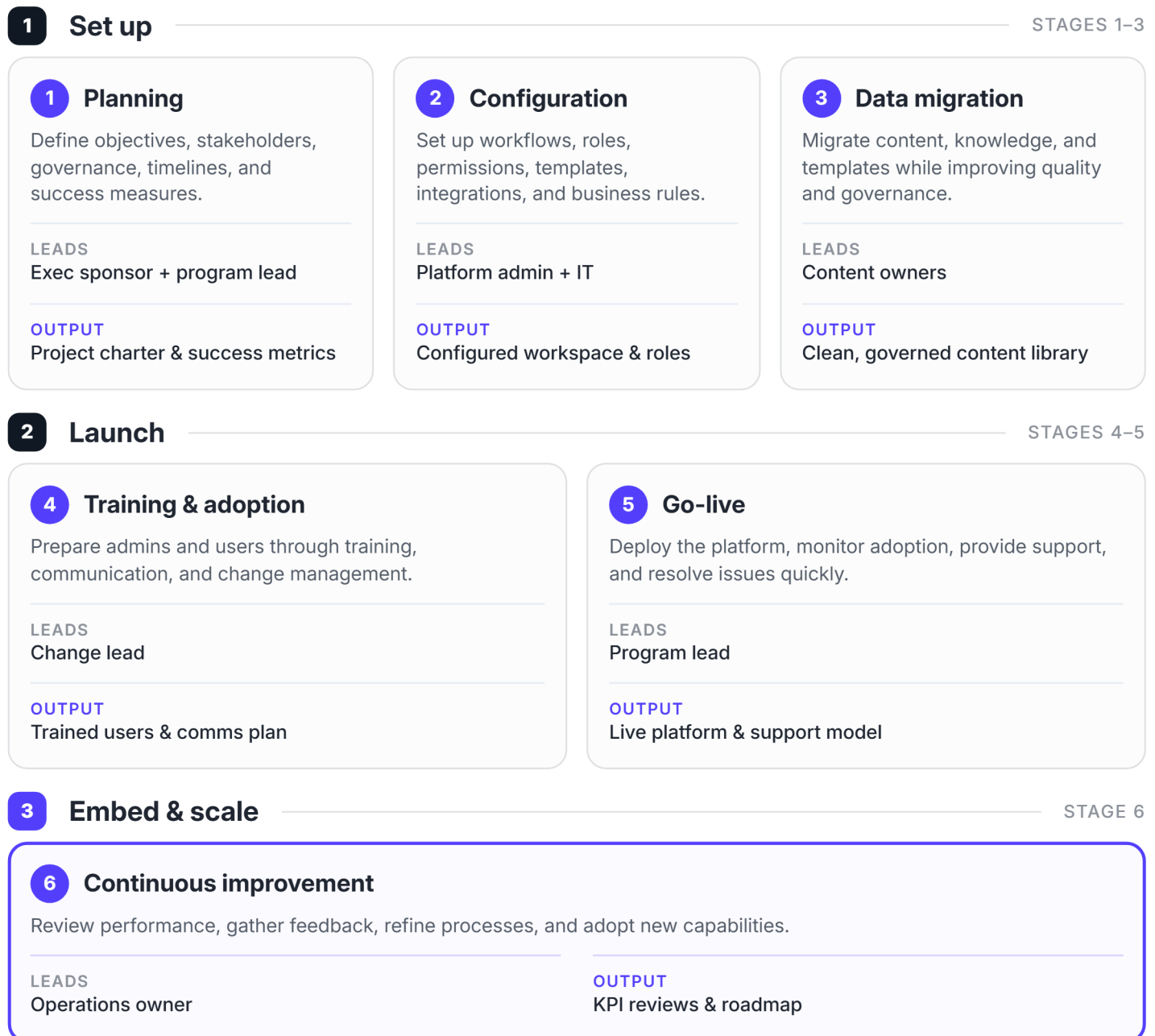
- Map a realistic implementation path
- Build an adoption and change plan
- Assess your organization's readiness

The implementation journey

15-SEC
ANSWER

Value comes from a planned rollout with clear owners and outputs, not from go-live day alone.

Most organizations follow the same six-stage journey, grouped into three phases.



Implementation is a business transformation initiative, not simply a software deployment. Owners and outputs shown are typical starting points, adapt them to your operating model.

What makes it work

COMMON SUCCESS FACTORS

- ✓ Clear project ownership and executive sponsorship
- ✓ Business, IT, and proposal teams involved throughout
- ✓ Content cleaned and organized before migration
- ✓ Governance and ownership defined early
- ✓ Investment in training and change management
- ✓ Adoption and outcomes measured after deployment
- ✓ Implementation treated as the start of improvement

QUESTIONS TO ASK VENDORS

- What implementation methodology do you follow?
- What resources will our organization need to provide?
- How long does a typical implementation take?
- What support is available during deployment?
- How is user training delivered?
- How are updates and new capabilities introduced?
- What customer success services exist after go-live?

THEN DRIVE ADOPTION: SIX FACTORS THAT SUSTAIN IT

Technology delivers value only when people use it as part of their daily work. Six factors sustain adoption, and the right measures track business outcomes, not system activity alone.

Executive sponsorship

Signals commitment and keeps the initiative a priority.

Clear objectives

Users grasp why the platform exists and what it should achieve.

Training

Builds confidence to use the platform well from day one.

Change management

Encourages new ways of working and eases resistance.

Governance

Sets ownership and accountability for content and workflows.

Ongoing support

Helps users as requirements and capabilities evolve.

MEASURE

Adoption across teams

Reuse of approved content

Reduced development time

Compliance & review efficiency

User satisfaction

Win-rate trends

Is your organization ready?

15-SEC
ANSWER

Gaps in process, content, and governance are opportunities. Fix them alongside the tool, not after.

Organizations with well-defined processes, trusted content, strong governance, and cross-functional collaboration adopt faster and see greater value. Use this assessment to identify strengths and priorities. There are no right or wrong answers.

Organizational readiness assessment

WORKSHEET · MARK ONE PER ROW

Completed by _____	Function _____	Date _____	
ASSESSMENT AREA	STRONG	NEEDS IMPROVEMENT	NOT SURE
Information architecture Information is organized, accessible, and easy to reuse.	☐	☐	☐
Content quality Proposal content is current, accurate, and approved.	☐	☐	☐
Knowledge management Knowledge is captured and shared rather than held individually.	☐	☐	☐
Governance Roles, ownership, approvals, and standards are defined.	☐	☐	☐

Where organizations fall short

ASSESSMENT AREA	STRONG	NEEDS IMPROVEMENT	NOT SURE
Compliance Requirements and regulatory obligations are tracked reliably.	☐	☐	☐
Proposal processes Workflows are documented, repeatable, and followed.	☐	☐	☐
Cross-functional collaboration Business development, proposal, legal, and contracts work together effectively.	☐	☐	☐
Operational maturity Performance is measured, responsibilities are clear, and improvement is encouraged.	☐	☐	☐

COMMON AREAS FOR IMPROVEMENT

- Content stored across multiple repositories
- Manual or inconsistent proposal processes
- Knowledge is hard to find or poorly maintained
- Governance and content ownership unclear
- Collaboration depends on email and disconnected tools
- Compliance activities are largely manual
- Reporting and performance metrics are limited
- Information duplicated across business systems

What your answers suggest

There are no right or wrong answers. Read your pattern of responses as a guide to where to focus, not as a verdict on whether to invest.

YOUR READINESS PROFILE

01 Ready to scale

STRONG ACROSS MOST AREAS

Focus on solution fit, scalability, adoption, and business outcomes.



02 Strengthen as you implement

A MIX OF STRONG AND NEEDS IMPROVEMENT

Build priority process, content, governance, and change-management improvements into the implementation plan.



03 Build the foundation

NEEDS IMPROVEMENT ACROSS SEVERAL AREAS

Address the highest-impact process, content, governance, and workflow gaps alongside the technology investment.

Readiness is not a prerequisite for investment. It helps you understand where implementation and change management may require more attention.

UNDERSTANDING YOUR RESULTS

Areas marked **Needs improvement** often represent the greatest opportunity to benefit from modern pursuit technology. Treat them as priorities during implementation planning; the goal is to identify opportunities, not to decide whether you're "ready."

KEY TAKEAWAY

Every organization has room to improve. The most successful implementations pair technology with better processes, governance, information management, and cross-functional collaboration.

05

STAGE FIVE Make the case

Before an investment is approved, stakeholders need a clear view of value, cost, risk, and return.

WHY THIS STAGE MATTERS

Executives approve outcomes, not features. Translate capability into business value, then confirm you're ready to decide.

IN THIS STAGE

12 Building the business case

13 Final buyer's checklist

BY THE END, YOU'LL BE ABLE TO

- Frame the case around business outcomes
- Define the KPIs that prove value
- Confirm you're ready to move forward

Building the business case

15-SEC
ANSWER

Lead with business outcomes and total cost, not features. Executives fund measurable value and reduced risk.

Executives rarely approve technology on features. They approve investments that solve business problems and deliver measurable value. Frame the case around outcomes, not functionality.

FOCUS ON BUSINESS OUTCOMES

Show how RFP software supports the outcomes leadership already cares about.

BUSINESS CHALLENGE		EXPECTED BUSINESS VALUE
Manual proposal development	→	Increased productivity, reduced admin effort
Difficulty locating trusted content	→	Faster reuse, improved response quality
Disconnected teams and systems	→	Better collaboration across the lifecycle
Compliance and governance risk	→	Reduced operational and contractual risk
Limited operational visibility	→	Improved reporting, forecasting & decisions
Inconsistent proposal processes	→	Greater standardization and scalability

45%

INDUSTRY INSIGHT

The average proposal win rate across organizations is 45%, a useful benchmark for measuring gains in proposal quality, pursuit strategy, and technology adoption.

Source: APMP, 2025 RFP Response Trends & Benchmarks Report

Where the value comes from

Value shows up in two places: the operational gains your teams feel week to week, and the financial and strategic outcomes leadership reports upward. Name both.

COMMON VALUE DRIVERS

Reduced development time

Increased content reuse

Fewer manual reviews

Improved compliance, less rework

Faster onboarding

Better collaboration

Improved pursuit visibility

More capacity, no added headcount

FINANCIAL & STRATEGIC VALUE

FINANCIAL	STRATEGIC
Improved productivity	Cross-functional collaboration
Lower administrative effort	Stronger governance
Reduced duplication	Consistent proposal quality
Lower operational costs	Improved knowledge sharing
Faster time to value	Greater organizational agility
Improved resource utilization	Support for long-term growth

Define success: KPIs to track

Agree measures before implementation so you can evaluate outcomes and demonstrate value afterward.

KPI	EXAMPLE MEASURE	DIRECTION
Proposal development time	Average time to complete a proposal	↓ DOWN
Content reuse	Percentage of approved content reused	↑ UP
User adoption	Active users across proposal and pursuit teams	↑ UP
Collaboration	Participation across business functions	↑ UP
Compliance	Reduction in review findings or issues	↓ DOWN
Proposal throughput	Number of proposals completed per period	↑ UP
Win-rate trends	Improvement over time alongside other factors	↑ UP
User satisfaction	Feedback from proposal and pursuit teams	↑ UP

Direction shows the movement that signals success. Not every measure should go up.

Build executive sponsorship

Active executive sponsorship is one of the strongest contributors to successful technology rollouts. Secure a sponsor before you present, and give them a case they can defend.

WHAT AN ENGAGED SPONSOR DOES

- Align the investment with organizational priorities
- Secure funding and resources
- Remove implementation barriers
- Encourage cross-functional participation
- Reinforce adoption and governance after deployment

PRESENT A BALANCED CASE

- ▶ The business problems being addressed
- ▶ Expected operational and strategic benefits
- ▶ The total cost of ownership
- ▶ Implementation considerations and resources
- ▶ Potential risks and how they'll be managed
- ▶ Success measures used after deployment

EXPERT TIP

Executives care more about business outcomes than features. Focus the case on productivity, risk reduction, governance, and measurable organizational value.

79%

INDUSTRY INSIGHT

Active sponsorship matters. Projects with extremely effective sponsors were 79% likely to meet their objectives, compared with 27% when sponsors were extremely ineffective.

For buyers: don't treat sponsorship as a checkbox. Identify an executive who is actively engaged, communicates the importance of the change, and helps remove organizational barriers.

Source: Prosci, *Change Management Success research*

Final buyer's checklist

15-SEC
ANSWER

Confirm requirements, evaluation, cost, implementation, and sponsorship before you commit.

You've defined requirements, evaluated vendors, assessed implementation, and built a business case. Before you decide, confirm your organization is ready to move forward.

DECISION CHECKLIST

TICK EACH BEFORE YOU COMMIT

- ☐ Business problems and desired outcomes have been clearly defined.
- ☐ Stakeholders from business, proposal, IT, procurement, and executive leadership have been engaged.
- ☐ Requirements have been prioritized as Must / Should / Nice to have.
- ☐ Proposal and pursuit workflows have been documented and reviewed.
- ☐ Vendor demonstrations and evaluations completed using consistent criteria.
- ☐ Customer references have been reviewed and validated.
- ☐ Vendor viability, product roadmap, and long-term strategy have been assessed.
- ☐ Total cost of ownership evaluated: implementation, integration, training, support, and internal effort.

Confirm you are ready to decide

-
- | | |
|--|---|
| ☐ Security, governance, compliance, and integration requirements confirmed. | ☐ An implementation approach and timeline have been agreed. |
| ☐ A user adoption and change management strategy has been developed. | ☐ An active executive sponsor has been identified and engaged. |
| ☐ Success metrics and KPIs have been defined. | ☐ A business case has been approved by key decision-makers. |
-
- ☐ The selected solution aligns with the long-term proposal and pursuit strategy.
-

DECISION & SIGN-OFF

Recommended vendor _____

Decision owner _____

Date _____

BEFORE YOU SIGN: ASK ONE FINAL QUESTION

Will this help us pursue, develop, manage, and win business, not just today, but over the next three to five years?

The most successful software investments align technology with people, processes, governance, and long-term business objectives. RFP software is a strategic investment, not simply a technology purchase.



About VisibleThread

VisibleThread is an RFP software platform. It supports teams across the pursuit lifecycle with collaboration, compliance, content quality, and governed AI.

It integrates with the enterprise systems you already use rather than replacing them, and applies enterprise-grade security and governance.

WHY VISIBLETHREAD

- ✓ Purpose-built for proposal and pursuit operations
- ✓ AI grounded in trusted enterprise content
- ✓ Explainable and traceable AI outputs
- ✓ Integrated compliance, requirements and contract analysis
- ✓ Workflow and collaboration across pursuit teams
- ✓ Enterprise-grade governance and security
- ✓ Integration with existing business systems

CONTINUE YOUR EVALUATION

VisibleThread can help you assess your current operations, see how the platform supports your requirements, discuss implementation, and explore real-world use cases.

To arrange a conversation or a demonstration

visiblethread.com