



2024 STATE OF STRATEGIC RESPONSE  
MANAGEMENT REPORT

# How Leading Companies Are Winning More

Harnessing AI and unlocking insights to drive profitable growth



# It's never been harder to win.

B2B buyers today are asking more questions and basing their purchase decisions on more stringent requirements.

**They have tighter budgets.**

**They're considering more solutions.**

**They want more information.**

**And they need the answers now.**

To differentiate and win in this hyper-competitive environment, organizations must not only address more demands, but also do so quickly, accurately, and persuasively, while mitigating the risk of sharing incorrect or outdated information.

Ad hoc responses and scattered content no longer cut it. Leading organizations are prioritizing Strategic Response Management (SRM) — the people, practices, and technology that unlock organizational knowledge for

profitable growth — to gain an outsized competitive advantage.

To better understand how B2B organizations can break away from the pack in this crowded, information-rich environment, Responsive — in partnership with APMP — surveyed more than 750 sales, proposal, and IT executives and practitioners in the US, UK, and India who have ownership or influence over their company's bid and proposal management activities.

Read on to discover what leading organizations are doing to stay several steps ahead of buyer trends while harnessing the power of AI to deliver compelling responses to a myriad of information requests — and win more business.



*As organizations cope with increasing buyer demands, those that are investing in Strategic Response Management (SRM) and AI-powered SRM platforms are outperforming their peers. The next generation of market leaders will use AI across the pursuit lifecycle to guide go/no-go decisions, enable intelligent workflows, and develop compelling responses.*



**Ganesh Shankar, Co-founder and CEO**



*Bid and proposal professionals are instrumental to driving revenue and profitable growth in their organizations. These are significant, board-level outcomes. It's time for proposal team leaders to move from the back office to the corner office.*



**Rick Harris, Chief Executive Officer**



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# Executive summary

Bid and proposal teams have long operated as the epicenter of growth — but organizations do not always give them the seat at the table they deserve.

The *2024 State of Strategic Response Management Report* set out to explore changes in the buying environment that underscore the need for investing in bid and proposal teams while identifying what leading organizations are doing differently to drive outsized results.

***The trends:***  
**Escalating buyer demands and higher stakes**

Buyers are seeking more information on shorter timeframes. As a result, the volume of work and associated business risk are soaring. And a lot is riding on strategic responses: 70% say revenue generated through bids, inquiries, and assessments has increased in the past year.

[Read more](#)

***The tension:***  
**Bid and proposal teams are invaluable, but undervalued**

90% of respondents say that bid and proposal teams are a direct and significant contributor to revenue. Yet, executives and practitioners do not see eye to eye on the level of investment required to drive a proposal center of excellence.

[Read more](#)

***The path forward:***  
**How leading companies are winning more**

Our key findings show that leading companies recognize strategic response teams as impact players, invest in resources and insights to fuel growth, and design scalable processes that unify teams.

[Read more](#)

***All eyes on AI:***  
**GenAI is table stakes — leading companies go beyond**

89% of those surveyed say their organization is experimenting with or using AI, but a clear divide is forming. Leading organizations are driving greater revenue by investing in platform-level capabilities that go beyond GenAI and apply to more than just writing responses.

[Read more](#)

# D1

*The trends:*

Escalating buyer demands  
and higher stakes

# Buyer scrutiny is on the rise

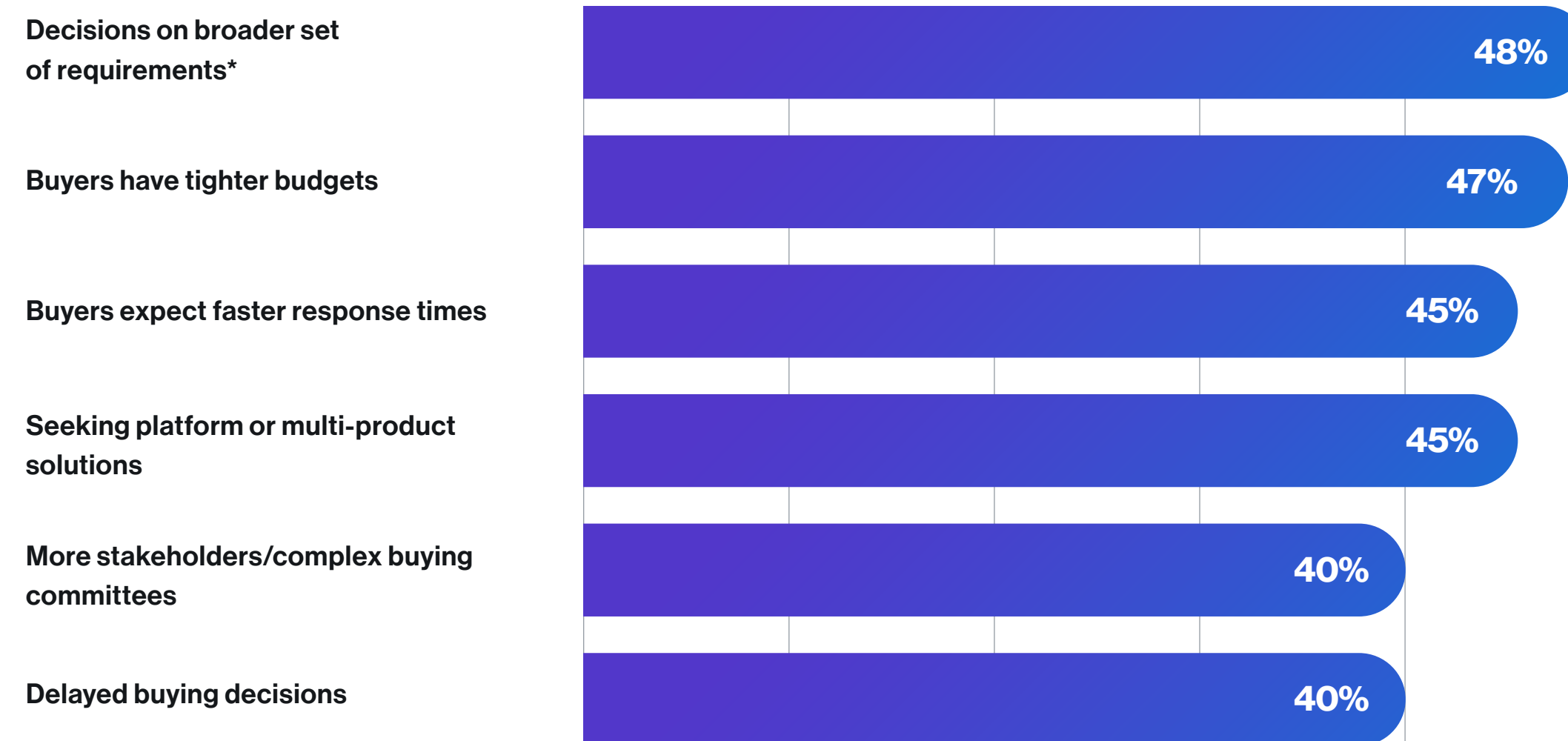
B2B buyers are increasing in sophistication and scrutiny. They're basing their purchase decisions on a broader set of requirements. On top of these increasing demands, buyers also want responses faster.

Nearly half of those surveyed report an increase in requirements from buyers (48%), tighter budgets (47%), the desire for platform-based solutions (45%), and the expectation for faster response times (45%).

These pressures are impacting companies' abilities to drive revenue. 52% of respondents report needing to provide prospects with more information to win deals, which are also getting more crowded with competitors (55%) and taking longer to complete (46%).

For nearly a third of those surveyed, these challenges are negatively impacting win rates and deal volume.

## Evolution in buyer behavior and expectations



## Revenue pressures



\*i.e., security, compliance, DEI, and ESG questionnaires

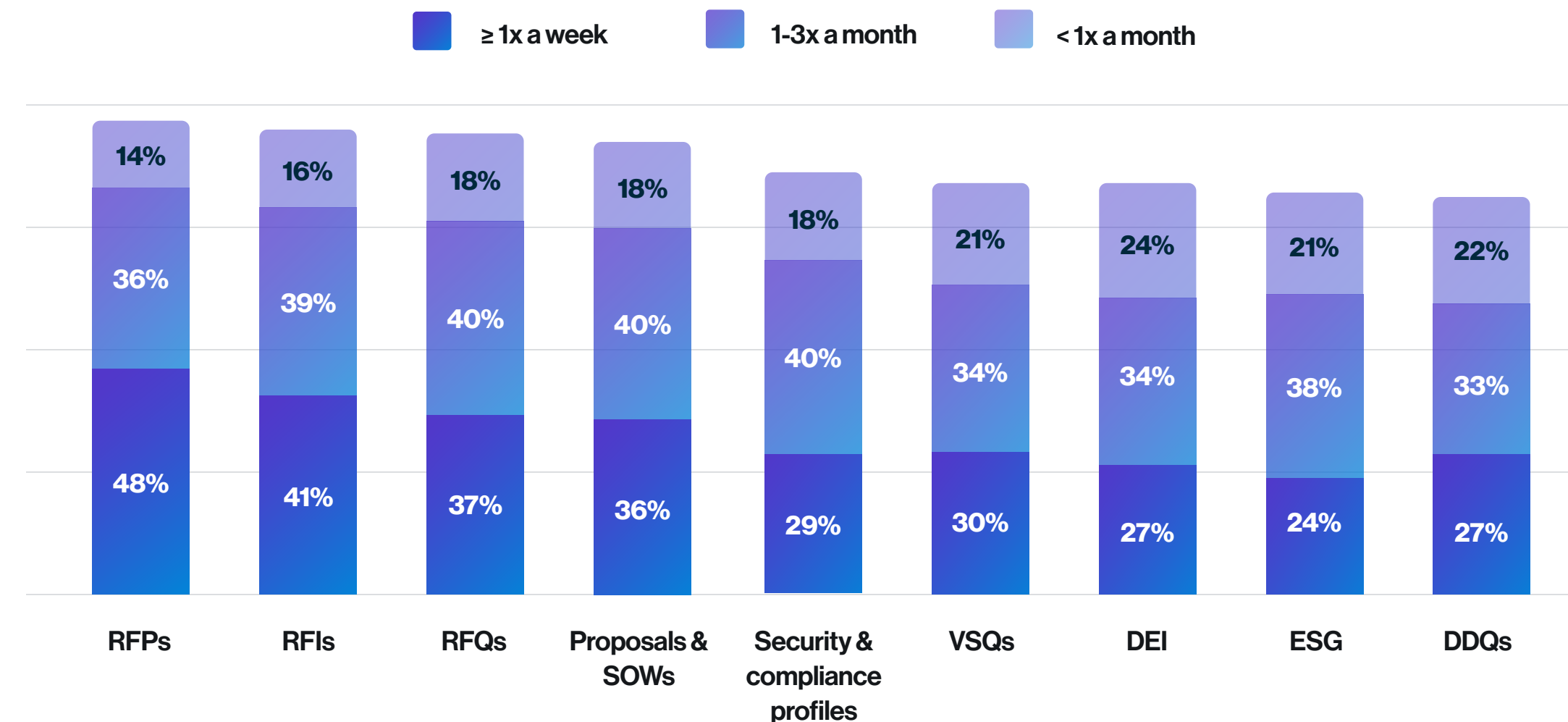
# Buyers are asking for more — far beyond RFPs

RFPs (Requests for Proposals) remain foundational to winning business as the most common type of assessment that companies have to field, with nearly 50% of organizations reporting that they respond to these often lengthy requests at least once or more per week.

But buyers' information requests are reaching far and wide — and growing in complexity. Organizations also have to tackle RFIs (Requests for Information) and RFQs (Request for Quotes) with relative frequency. DDQs (Due Diligence Questionnaires), VSQs (Vendor Security Questionnaires), ESGs (Environmental, Social, and Governance Assessments), and DEIs (Diversity, Equity, and Inclusion Profiles) are slightly less common. Fewer than a third of companies surveyed say they have to respond to these types of information requests on a weekly basis.

The variety of questionnaires, assessments, and inquiries that organizations have to manage with potential partners is remarkable. Each one demands a new set of information. Gathering, shaping, personalizing, and effectively sharing that company knowledge requires a fluid process that brings together the right subject matter experts (SMEs) and stakeholders to ensure the information shared is current, compelling, and compliant.

## Frequency of responses to questionnaires, assessments, and inquiries



## Key competencies in managing strategic responses

>96%

deem the following important:

- Aligning stakeholders on the process for responding
- Ability to collaborate and align across the organization
- Having a consistent brand voice & style
- Submitting detailed, accurate, and compliant responses
- Having a single source of truth for responses
- Ability to personalize responses
- Ability to trend historical data
- Using key reports that measure impact of responses
- Access to self-service/ automation

# The volume of work and associated business risk is soaring

With the uptick in buyer expectations and appetite for more information, it's hardly surprising that 77% of those surveyed say that the volume of work associated with RFPs and other strategic responses has increased in the past year. More than one in four respondents say that the amount of work associated with strategic responses has increased by more than 50%.

With more questions to answer, there's a greater likelihood of sharing non-compliant information. 64% of respondents say that the business risk associated with information exchange has grown in the past year; over one in five say the risk has increased significantly.

**77%**

**Increase in work volume for bids, assessments, and questionnaires**

**64%**

**Increase in business risk associated with strategic responses**

This study unveils a significant opportunity for organizations to improve their knowledge management and governance to ensure that all customer-facing information is up-to-date and compliant. Response management is a complex and collaborative process where many stakeholders are tasked with providing prospects with accurate information. It takes multiple people to win, but just one person to slip up and cause damaging repercussions.



# Almost half of company revenue is tied to strategic responses

Not only are RFPs and other assessments becoming more numerous, lengthy, and complex, but responses are also significantly growing in importance when it comes to revenue generation.

RFPs and other strategic responses influence, on average, 48% of company revenue generation. And that's growing. 70% of organizations say that the revenue they generated through responses to information requests has increased in the past year.

**48%**

**Percentage of company revenue tied to RFPs, bids, tenders, and proposals**

**70%**

**Companies reporting an annual increase in revenue generated through RFPs and other strategic responses**



# Industry spotlight



**Carrie Jordan**

**Global Director of Proposals  
serving Microsoft's Proposal  
Center of Excellence**



## **What is the value of Strategic Response Management (SRM) to field teams?**

SRM improves efficiency and boosts confidence in the proposal process. At Microsoft, the investment in an AI-powered SRM platform has streamlined access to a centralized knowledge base, allowing field teams to quickly find vetted, approved answers.

This has resulted in substantial productivity gains, more efficient operations, and better resource allocation. Rather than coming to the Proposal Center of Excellence, any one of the 17,000 users on our SRM platform can independently find accurate, compliant information to share with customers and prospects. Without being bogged down by internal information requests, the proposal team is better equipped to operate as a true strategic partner to the business, driving revenue growth by ensuring the company pursues the right opportunities and truly shines in every proposal.

## **What are the key metrics to track when measuring the impact of an SRM platform?**

A key metric to track is the time saved by teams in searching for and using pre-approved answers. This not only includes proposal professionals but also field teams looking to quickly and accurately answer customer or prospect questions. Microsoft estimates that each Q&A pair saves around 20 minutes of time spent on finding and validating responses. This metric not only quantifies productivity improvements but also emphasizes the quality and reliability of the answers provided, ensuring that the information aligns with the organization's standards.

Another significant metric is the cost savings achieved by using an SRM platform. By calculating the average cost per employee and the time saved on proposal responses, organizations can determine the monetary value of the platform. For example, if each employee saves 20 minutes per Q&A pair and handles 300 questions per proposal, the cumulative time and cost savings become substantial.

As organizations mature in their SRM adoption, outcome-based metrics like win rates, ROI, and reduction in risk exposure due to improved content accuracy and compliance better

demonstrate the strategic and financial benefits of the platform to the overall business, making it easier to justify investments to executives and stakeholders.

This comprehensive approach to capturing, quantifying, and communicating the value of the platform ensures that the benefits are clearly understood and appreciated at all levels of the organization.

## **How has an SRM platform helped your team manage the rapid growth in proposal volume?**

An AI-powered SRM platform has been crucial in managing the rapid growth of our proposal volume by providing a scalable solution that supports our expanding team. Starting from just four team members and growing to 65 in about a year and a half, we needed a robust system to handle the increasing demands. Standardizing on an SRM platform with built-in AI that powers efficient search functionality, project automation, and comprehensive content management has enabled us to scale our operations, ensuring we maintain high standards and timely submissions across all our proposals.

2022

*The tension:*

Bid and proposal teams are  
invaluable, but undervalued

# The unsung heroes propelling growth

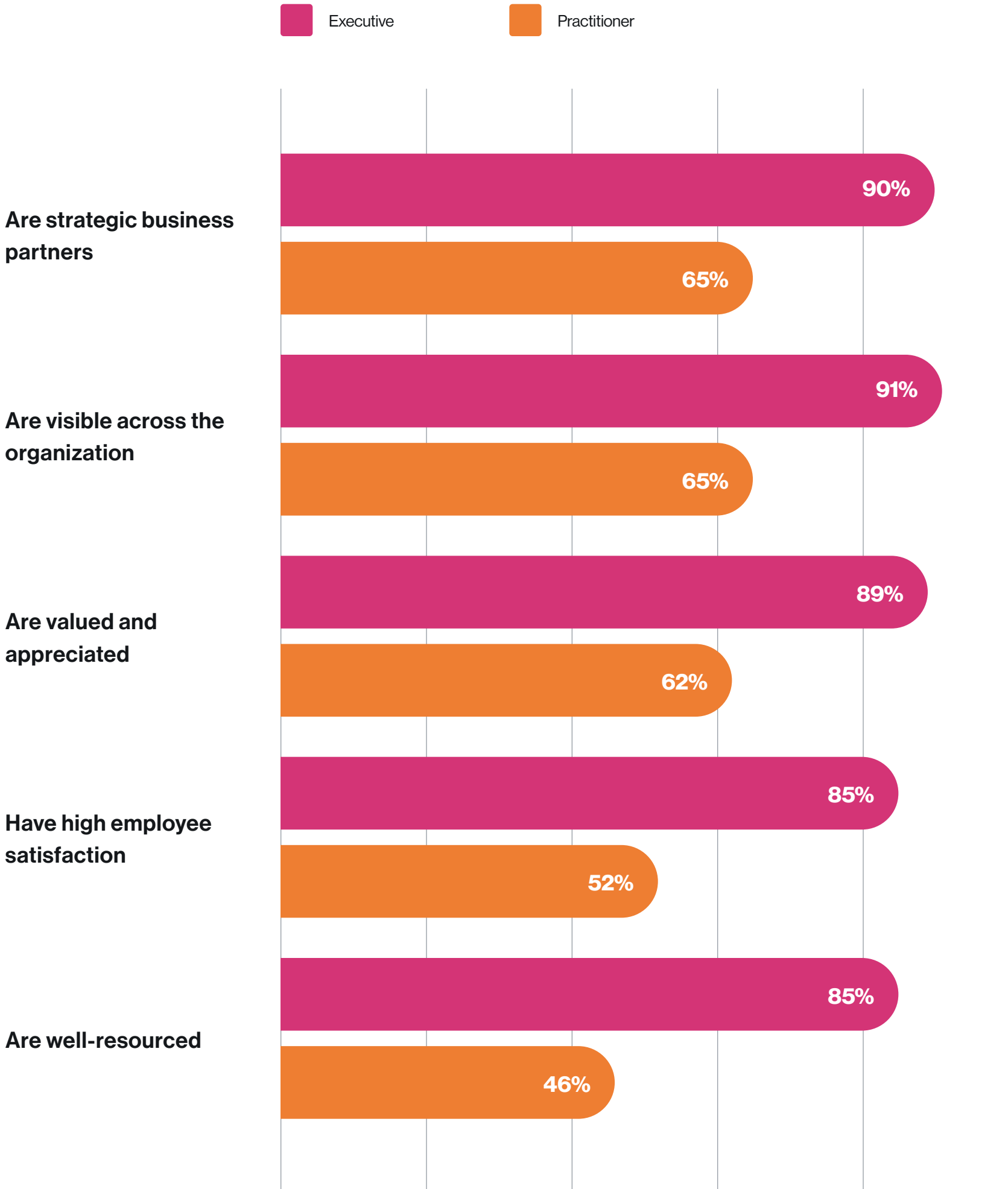
Most organizations have dedicated bid and proposal teams who focus on identifying and winning pursuits with the highest probability of success — all while managing the company's most valuable knowledge. 90% of survey respondents say that these teams are a direct and significant contributor to revenue, and 86% say they are a growth driver for the business.

There is also wide recognition that the importance of bid and proposal teams is on the rise. 88% of respondents view these teams as high impact, and 83% say that they are under increasing pressure — an unsurprising finding given that significantly more revenue this year has been attributed to bid, proposal, and capture activities. The uptick in buyer inquiries through formalized questionnaires and assessments — and their mounting complexity — also plays a role in elevating bid and proposal professionals' criticality.

Though there's general agreement on the vital role bid and proposal teams play in powering an organization's revenue engine, there are notable blind spots in how these teams are being perceived. Across the board, leadership is largely unaware that bid and proposal teams feel under-resourced and undervalued.

85% of executives (Directors, S/VPs, and C-Suite) say their bid and proposal teams are well-resourced, yet fewer than half of practitioners agree. Stark disparities exist on points of employee satisfaction and feeling valued, too. Only 52% of practitioners are highly satisfied at work. And though over 90% of executives say they consider bid and proposal teams visible, vital strategic partners, that perception isn't being equally felt — only 65% of practitioners feel that they're business partners who are well-known across their organization.

## Perceptions of bid and proposal teams



# It's a pressure cooker about to explode

Organizations are fielding more questionnaires, assessments, and inquiries as businesses get more demanding when evaluating potential partners. This environment has significantly strained the bid and proposal teams overseeing responses and surfaced a number of significant challenges.

## Significant challenges facing proposal teams\*

- 50%** Too few resources to effectively handle the volume of requests
- 49%** Tight deadlines
- 48%** Difficulty getting input from multiple subject matter experts (SMEs)
- 46%** Overwhelming volume of siloed and scattered information
- 41%** Difficulty identifying the right requirements and/or contributors

\*Ranked in top five

These friction points are especially concerning given leadership's misappraisal of how bid and proposal teams feel about their resources and value. There's a general disconnect between the way executives perceive the health of these teams and the reality (see page 12).

As buyers seek more detailed information on shorter timelines, organizations need to work to ensure that bid and proposal professionals have the agency to excel — which involves increasing their visibility, more intentionally positioning them as strategic business partners, and providing them with better resourcing.



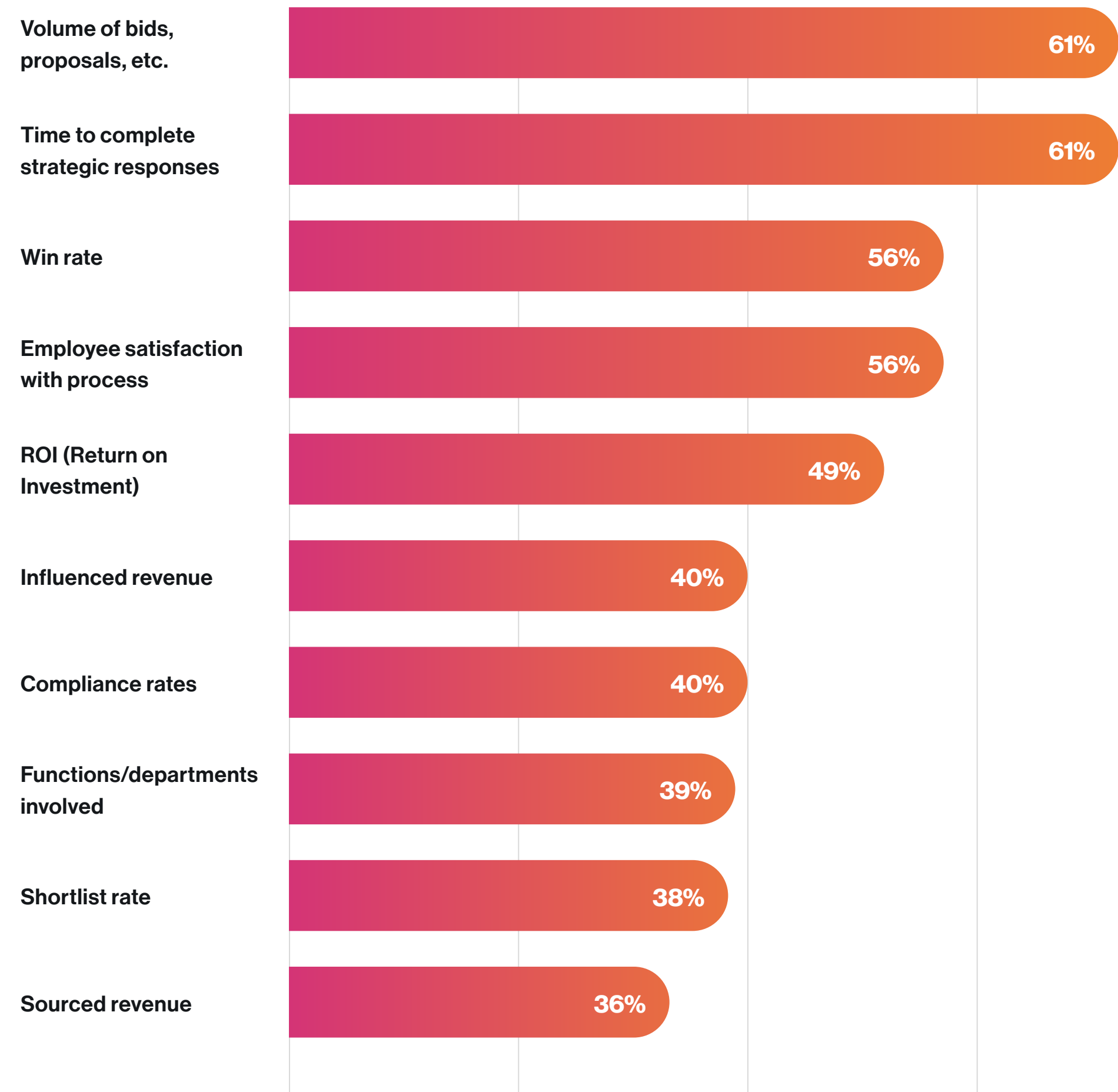
# Organizations are over-indexed on the wrong outcomes

With more work to do, the necessity for productivity is evident when looking at the metrics organizations are prioritizing to measure bid and proposal teams. Volume of strategic responses produced and completion time — in other words, “how many” and “how fast” — are the top two outcomes that companies say are critical to assessing the impact of the proposal function.

However, most organizations are overlooking the importance of board-level metrics that these teams truly drive — notably revenue, ROI, and compliance — which don’t make the short list for proposal teams’ impact, according to this research. 56% of those surveyed keep tabs on win rates, but fewer than half of respondents are tracking revenue metrics, compliance, and ROI.

As strategic partners to the business, bid and proposal teams are central to driving growth. To better assess the impact of these teams, organizations need to reprioritize the metrics they’re considering as critical outcomes. Productivity and speed are important, but likely less so than the key results that contribute to organizational growth — such as win rates, influenced revenue, and ROI.

## Critical outcomes measured *(Ranked in top five)*



# Industry spotlight



**Melinda Bunston**  
Chief Executive Officer



Senior Capture Manager



## What's missing from the dialogue about bid and proposal teams?

Selfishly, as my title implies — it's capture. We are bridging the gap across business development, sales, and bid and proposal management. Once an opportunity has been identified, the capture manager builds strategic relationships both within their organization and within the customer stakeholder community to turn that opportunity from being a prospective opportunity to a real one. What you want to see when you get an ITT (Invitation to Tender) is that it has had your mark stamped all over it.

Companies need to be strategic about which opportunities to pursue — not all are equally winnable or necessarily a good fit. Capture professionals are critical to making sure the revenue engine operates efficiently: making sure pursuit resources are properly allocated to the opportunities that a company is most likely to win and that they make the most sense for the company's growth plans.

## How do you see this profession evolving and moving from “the back office to the corner office,” as APMP CEO Rick Harris put it?

Our north star as a capture team starts with strategy and board-level impact. More stakeholders and executives are starting to see us that way, but we still have a lot of work to do to really elevate our visibility and influence as leaders.

In general, bid and capture is becoming more professional. It used to be seen as a service done by whoever was available — often more of an administrative person. It was very “back of the house.” But I think as we're growing as a profession, we're getting recognized for our all-around strengths. There's not only a sales side to it, but you've also got to understand finances, strategy, when to fold, how to win things. Leadership and partners across the whole organization are seeing our command of these key business skills, and as a result, we're increasingly being recognized as key drivers of growth.

# 03

*The solution:*

Driving outsized results with  
Strategic Response Management



# What is Strategic Response Management (SRM)?

The people, practices, and technology that unlock organizational knowledge for profitable growth.



# How is SRM developing?

A rising tide of commercial trends has elevated the importance and impact of bid and proposal teams — and fueled the emergence of Strategic Response Management (SRM) as a cornerstone capability for any organization that seeks scalable, profitable, and consistent revenue growth.

For business leaders, SRM creates company value by codifying and unlocking the full revenue potential for their knowledge, know-how, intellectual property, and customer insights that reside “between the ears” of their internal experts. With the right SRM approach, organizations can effectively and strategically leverage this knowledge across all customer-facing teams to present compelling, compliant narratives that win business.

For proposal professionals, SRM will uplevel their careers. Armed with AI, advanced analytics, and a deep skill set in knowledge management and cross-functional collaboration, SRM leaders will continue to grow their impact on revenue operations and are poised to become the next generation of growth leaders in the C-suite.

— **Stephen Diorio**

“

*Armed with AI, advanced analytics, and a deep skill set in knowledge management and cross-functional collaboration, SRM leaders will continue to grow their impact on revenue operations and are poised to become the next generation of growth leaders in the C-suite.*



**Stephen Diorio**

Managing Director at  
The Revenue Enablement  
Institute & Senior Fellow,  
AI at Wharton



# Why is SRM a mission-critical investment?

Over the last few years, companies have struggled to effectively respond to the rapidly growing volume of information requests that have expanded beyond traditional bids to encompass DEI policies, sustainability practices, AI data privacy, and more. Most organizations aren't equipped to handle the increased volume and complexity because they struggle with knowledge management and siloed org charts that isolate bid and proposal teams, which are driving one of the most strategic, revenue-generating functions in an enterprise.

Organizations must immediately embrace a new approach — one that unifies teams, centralizes content, and democratizes knowledge. Now is the time to recognize and elevate bid and proposal teams, which are at the very core of SRM, and empower them to function at maximum capacity. Companies that understand the importance of this mission-critical function and invest accordingly will pull ahead, winning more deals and greater revenue while improving operational efficiency and employee satisfaction across the board.

— Rick Harris

“

*Companies that understand the importance of this mission-critical function and invest accordingly will pull ahead, winning more deals and greater revenue while improving operational efficiency and employee satisfaction across the board.*



**Rick Harris**  
Chief Executive Officer



# What do organizations and proposal teams need to do differently?

Historically, proposal teams have been seen as cost centers, but this is outdated. The reality is that proposal teams are strategic response teams that align cross-functional stakeholders, processes, and systems. They are stewards of capital, identifying the right opportunities to pursue and then orchestrating the delivery of winning responses and proactive proposals that make a real difference when it comes to topline revenue. It's time to recognize proposal teams for their vital role in making the revenue engine hum.

At Sodexo, the most significant transformation we have driven is evolving from a bid & proposal team to a strategic response team. We've changed perceptions and upleveled the function to operate at a higher level and get a bigger seat at the table by leveraging performance data to demonstrate our direct impact on revenue. We continue to deliver ROI to the organization several times over. This transformation would not be possible if the numbers didn't move with us, and we have the results to show for all our work, including a steady, double-digit increase in win rates, doubling stakeholder CSAT scores, and more mega deals won than any prior year.

— Danelle Morrow

“

*We've changed perceptions and upleveled the function to operate at a higher level and get a bigger seat at the table by leveraging performance data to demonstrate our direct impact on revenue. We continue to deliver ROI to the organization several times over.*



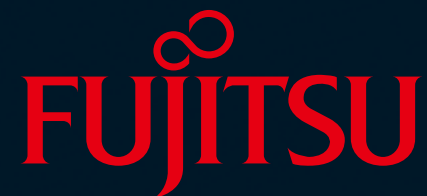
**Danelle Morrow,**  
**CF. APMP**  
VP, North America Proposal  
Development Center



# Industry spotlight



**Darlene Smith**  
Pursuit Centre Manager



## Why are strategic response teams so instrumental in driving business impact?

Proposal professionals know more about the business than any other person in the company, save for maybe the CEO. They know how all the different areas work. They know how operations work, how we attract and retain talent, what a CSM does, what project reporting tools look like. You can go to your bid manager and find out pretty much anything about the business.

I think that's what I love most about working in this role. You build all of these relationships in the organization. You become intimate with all the little secrets. We are stewards of the company's most critical asset: its knowledge. That is value — and that is power.

## How does your C-suite engage in Pursuit Centre initiatives?

Within North America, we have a very tight-knit relationship with our C-suite. They're definitely always willing to roll up their sleeves and get involved in bids, and they see value in engaging because they know it drives topline impact.

Sometimes when we involve our C-level team, we just want the voice of the executive, and sometimes it's useful for very strategic or high-value opportunities. They'll attend orals, presentations, and finalist presentations with our account team just to show the support that's behind our solutions. We also keep them involved at a high level. We have regular briefings where we deliver reporting and they always come back with great ideas. They're pretty amazing.

## What major trends are driving change in the industry?

Competition is higher than ever. Supply chain teams are evolving and RFPs are getting more sophisticated. We are constantly having to up our game in terms of quality of responses, including new content to make sure bids are not only compliant, but compelling enough to stand out in a crowded field.

I feel like when I first started it was about assembling the documents, tabulating the binders — there was a necessity for it to be more administrative. We would have to deliver boxes and boxes of binders to customers. Technology has allowed us to elevate from that and the function is just becoming more and more important. The profession has evolved dramatically from being more of an administrative task to now operating as a strategic leadership role. I have a very different dynamic and seat at the table with our C-suite than I did earlier in my career, and it's a reflection of how far we have come and the work we have done to get there.

# D4

*The path forward:*

How leading companies  
are winning more

# How leading companies are winning more

With more buyer requests and greater revenue on the line, companies have a choice: crush their strategic responses by driving collaboration across the organization or let the responses crush them.

To surface best practices, we looked at what leading companies are doing differently to drive outsized results. For comparison purposes, we've grouped responding organizations into three categories and will be referring to them as:

## Leaders

- Win rate 60%+, or
- YoY revenue increase, or
- YoY increase in employee satisfaction

## Performers

- Win rate 40% to 60%, or
- Stable revenue YoY, or
- No change in employee satisfaction YoY

## Novices

- Win rate <40%, or
- YoY revenue decrease, or
- YoY decrease in employee satisfaction

Leading companies do three things differently

### 01.

Recognize strategic response teams as impact players

### 02.

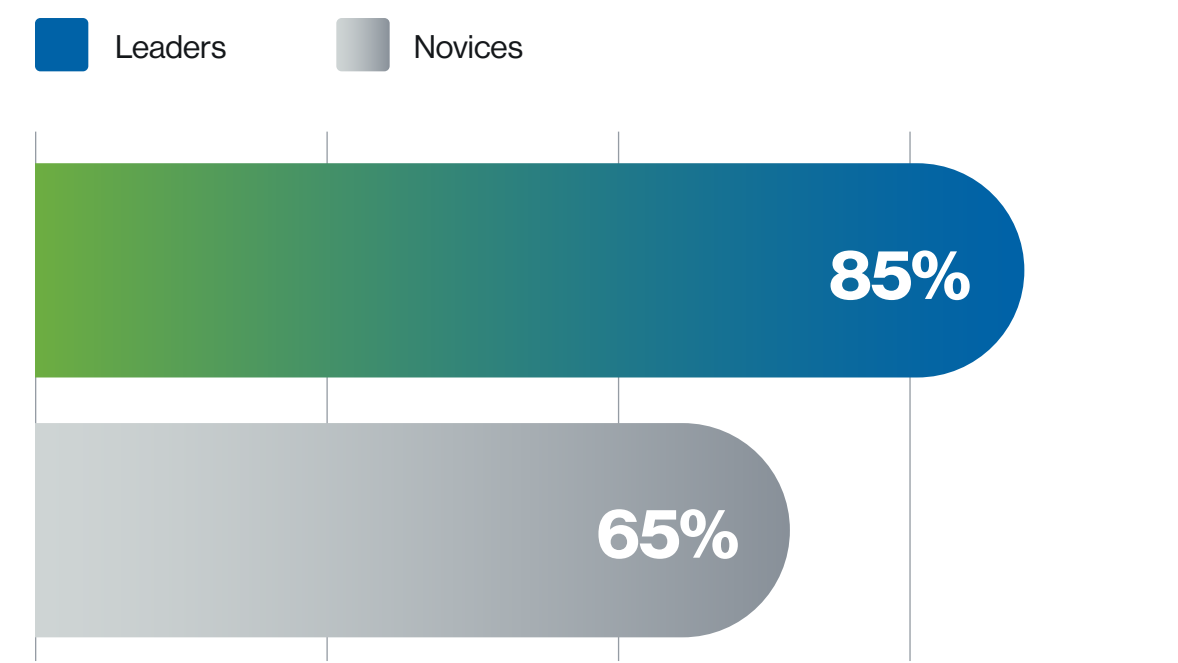
Invest in resources and insights to fuel growth

### 03.

Design scalable processes that unify teams

# Recognize strategic response teams as impact players

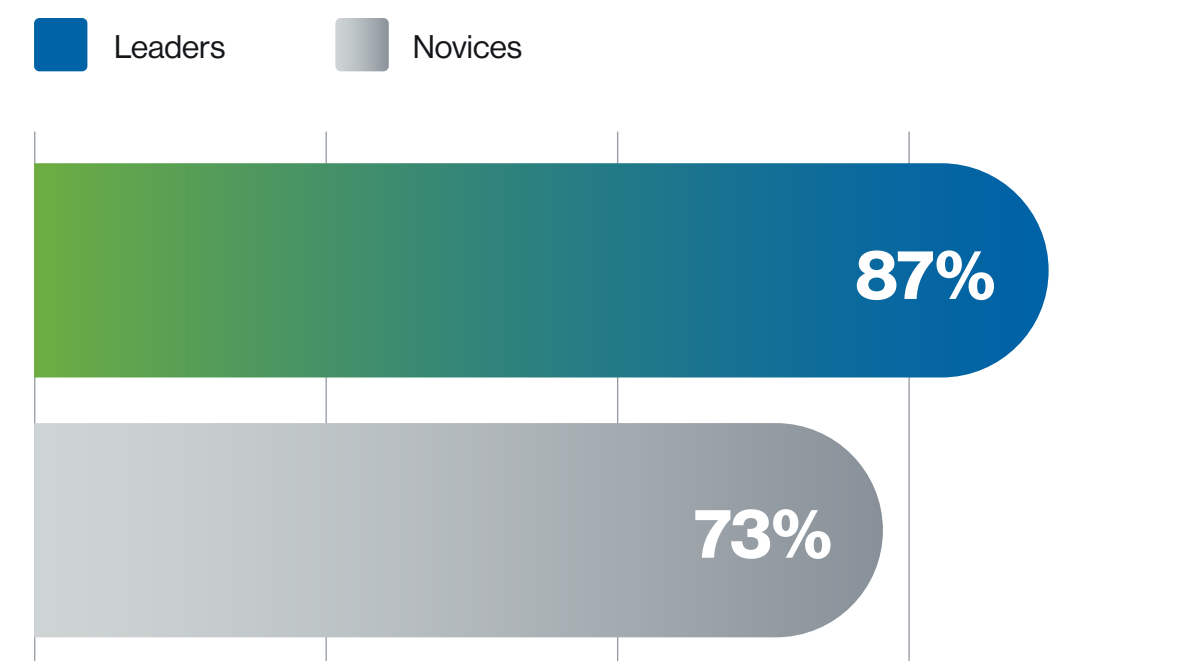
## Strategic response teams shape GTM strategy\*



On the whole, companies with the highest win rates exemplify a synergistic relationship between the C-suite and bid and proposal teams. Compared to Novices, strategic response teams at companies designated as Leaders are far more likely to contribute to and help shape the company's go-to-market (GTM) strategy.

\*Leaders = win rate > 60%; Novices = win rate < 40%

## C-level involvement in strategic responses\*



Organizations with the highest win rates don't just view bid and proposal teams as strategic partners — they demonstrate regular collaboration between these teams and company leadership.

We found that Leaders involve their C-level executives in strategic responses more often. 87% of Leaders say they regularly solicit contributions from the C-suite to RFPs and other information requests, while only 73% of Novices do.

When asked about why they collaborate with C-level executives on a regular basis, Leaders clustered around three top reasons.

### They believe:

**63%** The C-Suite has expertise that everyone in the organization should access and use

**57%** Executives' contributions will impact win rates

**55%** Executives' contributions will accelerate company growth



# Invest in resources and insights to fuel growth

Companies with greater commercial success understand that growth requires appropriate resourcing and invest in their bid and proposal teams accordingly.

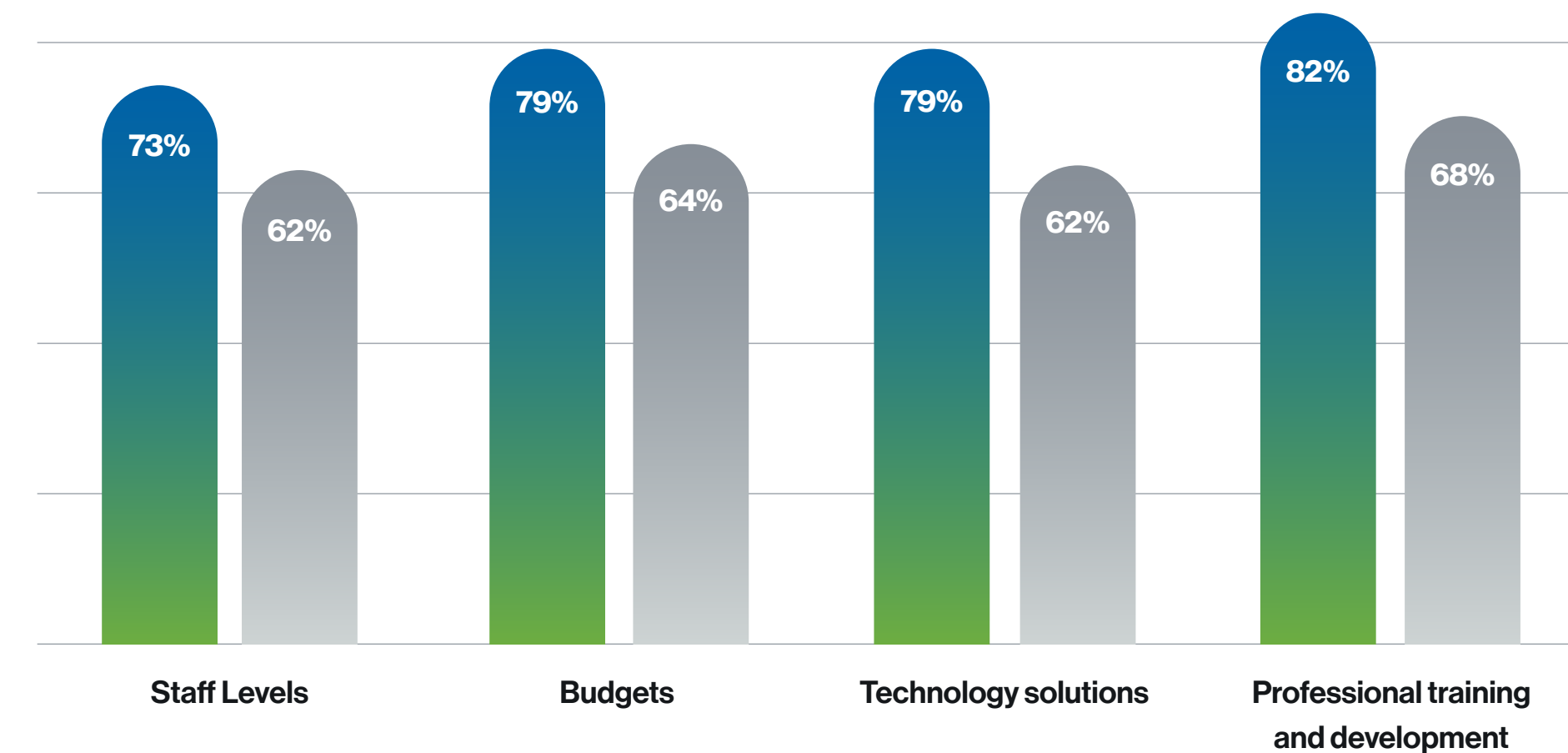
Leaders are far more likely than Novices to be increasing budgets for bid and proposal teams, investing in technology solutions, and focusing on training teams — and are seeing higher win rates as a result. Companies that are investing in these key areas are also more likely to have reported an annual revenue increase.

This study also revealed an alarming relationship between resourcing and revenue. Nearly one in four (24%) of the companies surveyed that reported a decrease in revenue YoY say that their top proposal challenge is that they have too few resources to effectively handle the volume of requests. As a comparison, only 10% of Leaders ranked this as the top challenge. For leading organizations, tight deadlines are the greatest hurdle.

Companies with higher win rates are also far more likely to be using data and analytics from response systems to improve processes and increase win rates. 80% of Leaders apply strategic response data, compared to only 61% of Novices. Because Leaders view bid and proposal teams as strategic partners contributing to GTM strategy, it makes sense that they're turning to data from this function to win more deals.

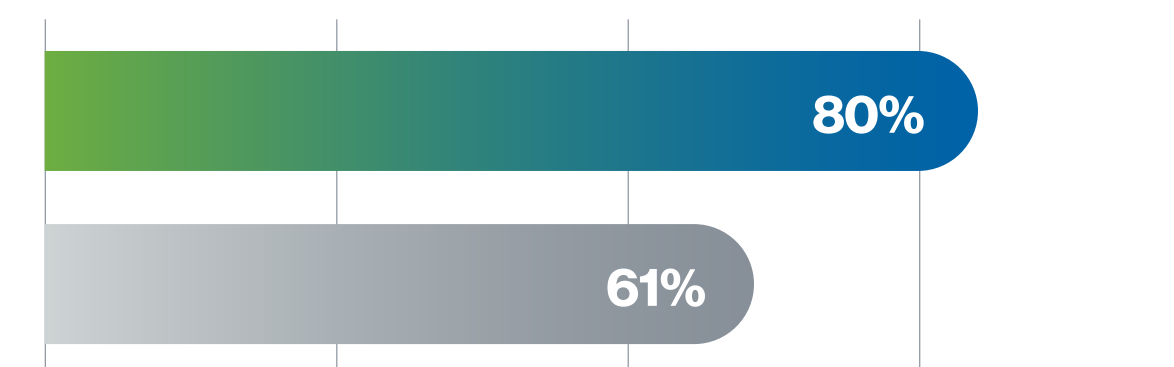
## Increase in investment and support for bid and proposal teams\*

Leaders Novices



## Applying data to improve processes and win rates\*

Leaders Novices



\*Leaders = win rate > 60%; Novices = win rate < 40%

# Design scalable processes that unify teams

Leaders are more likely than Novices to place importance on Strategic Response Management (SRM) within their organizations. 97% of companies that reported an increase in employee satisfaction for those involved in response processes (Leaders) consider SRM important to their business, compared to 68% of companies that saw a decrease in employee satisfaction YoY (Novices).

SRM involves the orchestration of people, practices, and technology to leverage company knowledge for profitable growth. This research reveals that investment in and activation around SRM is not only tied to higher win rates and increased revenue, but also a better employee experience.

## Strategic Response Management (SRM) considered important\*



\*Leaders = increased employee satisfaction YoY; Novices = decreased employee satisfaction YoY



# Design scalable processes that unify teams

(continued)

The research also illuminated glaring disparities in employee satisfaction between Leaders and Novices across many aspects of SRM. Leaders stand out by:

- **Clearly defining roles across teams and stakeholders involved with SRM**
- **Providing training for anyone in the organization who responds to RFPs or other information requests**
- **Actively using analytics to improve processes and increase win rates**

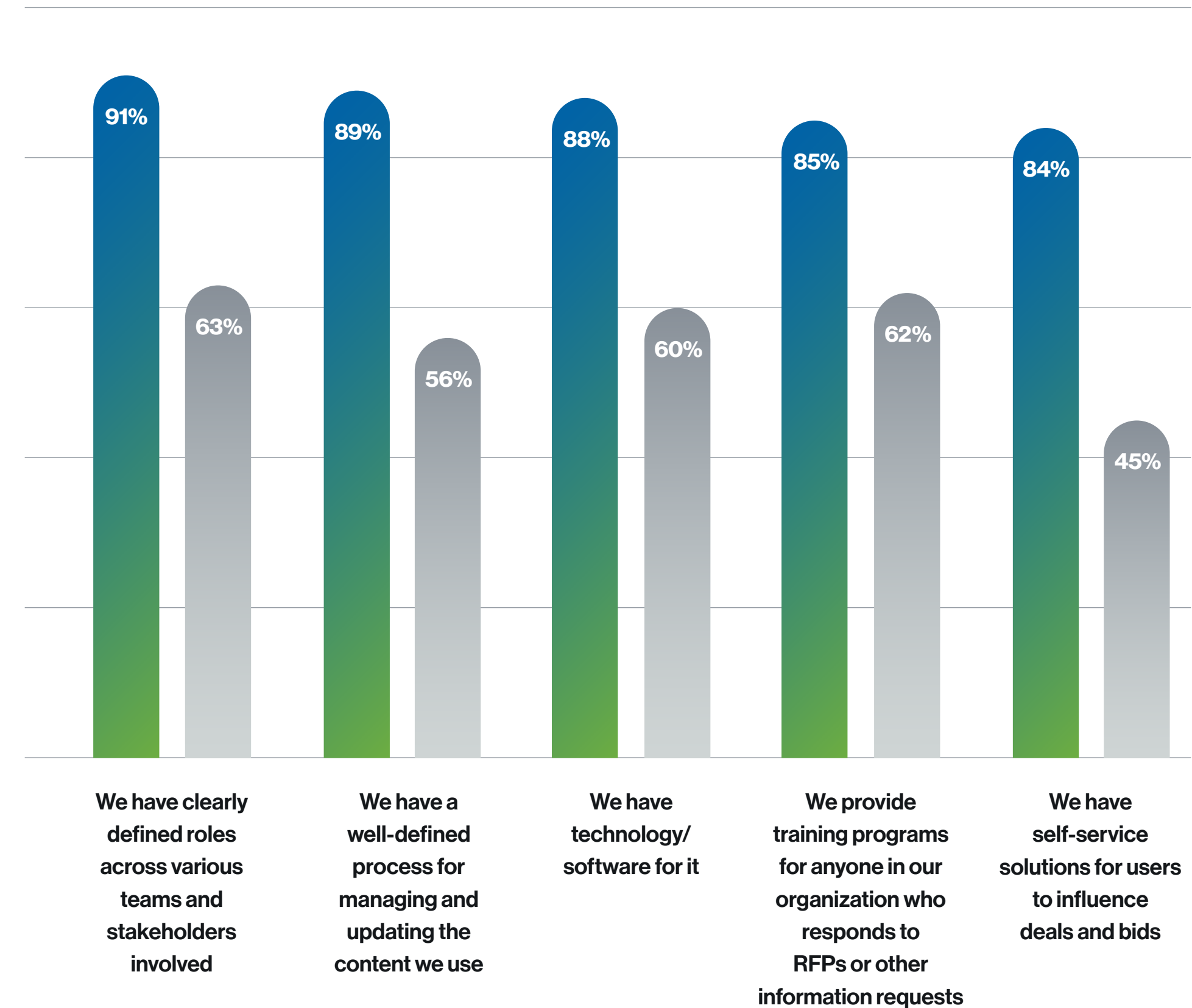
Critically, fewer than half of Novices have self-service solutions that allow users to independently influence bids and enable those outside of the response team to access content used in strategic responses. On the other hand, 84% of Leaders do — and they're seeing employee satisfaction increase as a result.

The best SRM solutions will have robust knowledge management capabilities that make an organization's most current, compelling, and compliant information accessible to any customer-facing employee. This technology optimizes response processes by allowing field teams to independently access accurate information that best addresses customer or prospect questions.

Leading solutions even have proposal-building tools that empower sales teams to auto-generate smaller proposals or SOWs without needing to get bid and proposal teams involved. This self-service functionality critically frees up valuable time for bid and proposal teams to focus on complex or higher-value RFXs and assessments.

## Strategic response processes' impact on employee satisfaction\*

Leaders Novices



\*Leaders = increased employee satisfaction YoY; Novices = decreased employee satisfaction YoY

# Industry spotlight



**Danelle Morrow,**  
**CF. APMP**  
VP, North America Proposal  
Development Center



## Why should the bid and proposal management function be positioned as a strategic part of the revenue engine?

Changes in buying behavior, advances in AI, and the push for efficient growth are creating increased pressure on customer-facing functions in an organization to contribute to revenue generation. Bid and proposal teams are rising to the challenge, but they face a perception problem. In order to earn a seat at the table alongside other teams developing go-to-market strategy, we need to change the perception of the team.

Historically, proposal teams have been seen as cost centers, but this is outdated. The reality is that proposal teams are strategic response teams that align cross-functional stakeholders, processes, and systems to deliver winning responses to information requests by harnessing a company's knowledge. The results are happier employees and greater topline revenue. It's time to recognize proposal teams for their vital role in making the revenue engine hum.

## How do you build for scale in a rapidly growing business?

Responding to information requests is a cross-functional process, involving executives, IT, security, sales, marketing, and more. The proposal team is responsible for ensuring that the process is effective, efficient, and positive. This is where technology, particularly the integration of AI with SRM software, plays a crucial role.

At Sodexo, we immediately recognized that we needed to invest in technology in order to scale. The challenge was choosing the right one. By leveraging AI built into our SRM platform, we're able to drive faster, better responses, allowing our team to focus on high-value activities like tailoring responses to customer needs and driving better alignment across the business. We're able to learn from customer insights, scale best practices, and operate more strategically, allowing us to be more proactive than ever before.

*Continued on next page*

# Industry spotlight



**Danelle Morrow,**  
**CF. APMP**  
VP, North America Proposal  
Development Center



*Continued*

## How do you make a business case for Strategic Response Management — and why is it important?

Every proposal leader needs to be able to make a strong business case to justify the headcount, budget, and technology their team needs to fulfill their charter.

Three weeks into my role at Sodexo, our CFO announced that he was cutting my budget by 80%. I was perplexed. How can you cut the revenue growth engine and expect to win more business? So, I did what we do best in our profession. I wrote the proposal of my life.

To do this, I focused on six key areas to provide an ROI that helped executives understand the need for investing in the SRM function. Based on my experience, there are six key elements to a strong business case:

- 01. Tie success to business goals:** Link the team's success to addressing critical business challenges, such as growing revenue or win rates.
- 02. Understand stakeholder pain points:** Look for ways to address needs like generating higher quality responses at scale.
- 03. Provide side-by-side investment comparisons:** Compare the investment in proposal management to other go-to-market functions like sales and marketing.
- 04. Educate other teams on the role:** Shift perceptions by explaining the importance of proposal management within the customer journey. Spoiler—it's critical.
- 05. Quantify ROI:** Clearly articulate the return on investment to justify the funding.
- 06. Show the impact of funding:** Share details on how you would level up the team with the incremental resources.

I told the story with data and not only secured all of the funding that was going to be cut, but I also asked for more and got a 20% increase.

Creating a well-structured business case is crucial for securing the resources needed to drive your team's success and, ultimately, the organization's growth.

# 05

*All eyes on AI:*

GenAI is table stakes —  
leading companies go beyond

# Everyone is experimenting with AI

There's immense promise in AI bringing much-needed efficiency gains to burdened Strategic Response Management (SRM) teams — with real impacts on tangible growth.

Nearly everyone (89%) is experimenting with or using AI to augment aspects of their strategic response processes. While companies are united in their appetite to use AI, top use cases are still scattered, with no clear winner.

**The top ways organizations are using AI for SRM today are:**

**39%**

**Real-time responses using AI chatbots trained on trusted content**

**38%**

**AI-enabled document shredding analysis and/or recommendations**

**36%**

**Automated workflow and project management capabilities**

**89%**

**Experimenting with or using AI**

# Anticipated AI benefits are vast and extend beyond writing responses

When the conversation around AI first heated up last year, many bid and proposal professionals feared that the technology would supplant them. This study reveals that AI — while transformational — is not a threat to anyone’s employment.

Critically, most Leaders see AI as augmenting human input, rather than replacing it. Among companies that have a 60%+ win rate, the top expected impact of implementing AI in Strategic Response Management (SRM) is that it will optimize the use of staff time while operating with the same size team.

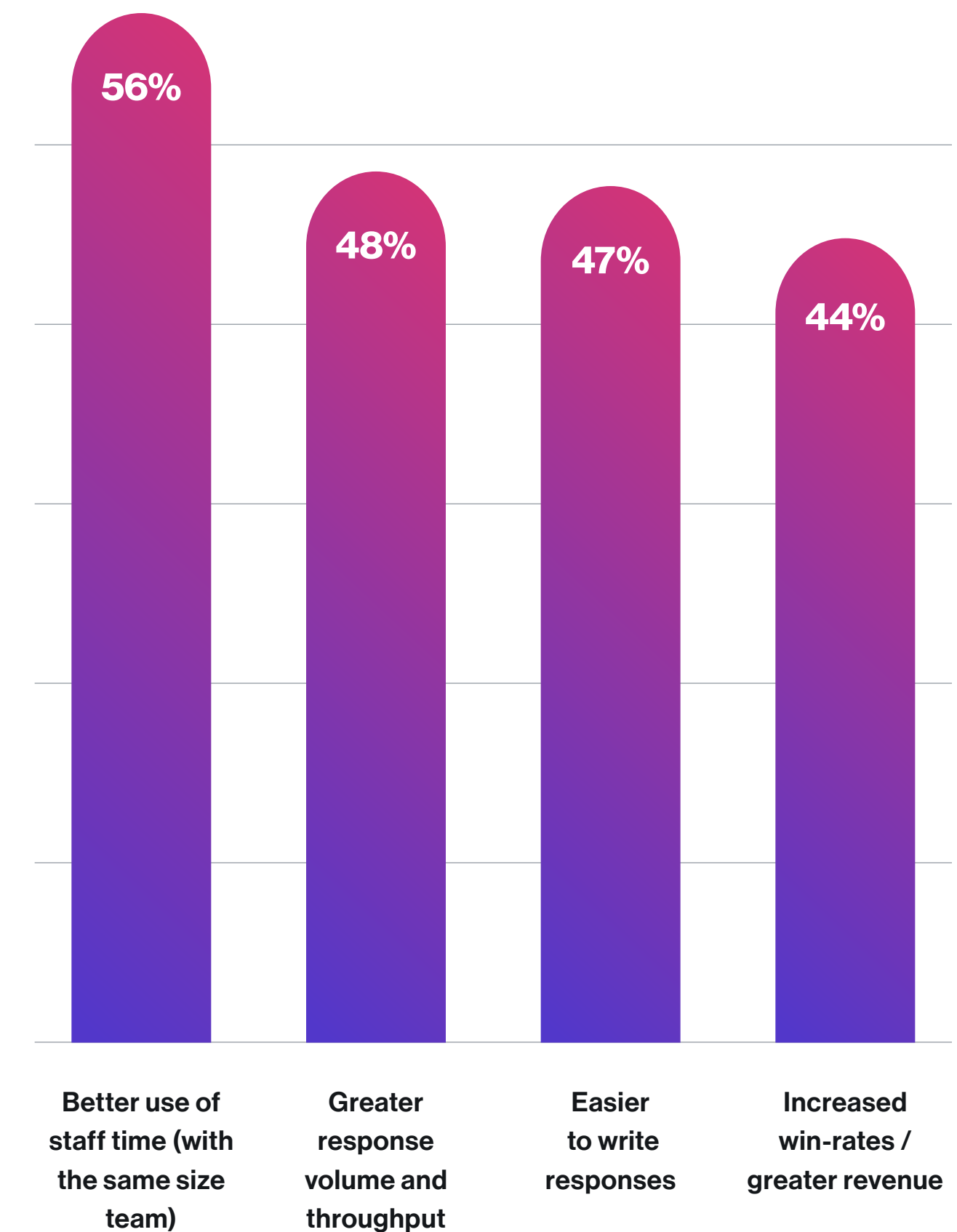
Much of the AI conversation in proposal management has centered on writing winning responses. While this is a critical benefit, respondents expect to leverage AI across a wider array of use cases — most notably to reduce repetitive and error-prone tasks associated with content management and to flag risks to compliance. Organizations also expect AI to enable guided user experiences to improve project management.

## Top ways AI will impact SRM in the future\*

- 63%** Automating or simplifying content management by flagging and helping update ROT (redundant, outdated, or trivial) content
- 56%** Quickly and easily drafting and optimizing responses
- 55%** Checking responses for accuracy and compliance, flagging risks along the way
- 52%** Personalizing responses based on customer context and relevant company advantages
- 49%** Set up project timelines, tasks, and review cycles with minimal user input

\*Ranked as a top-five impact

## Leaders’ anticipated impact of AI in Strategic Response Management\*\*



\*\*Companies with win-rate > 60%



## Anticipated AI benefits are vast and extend beyond writing responses

*(continued)*

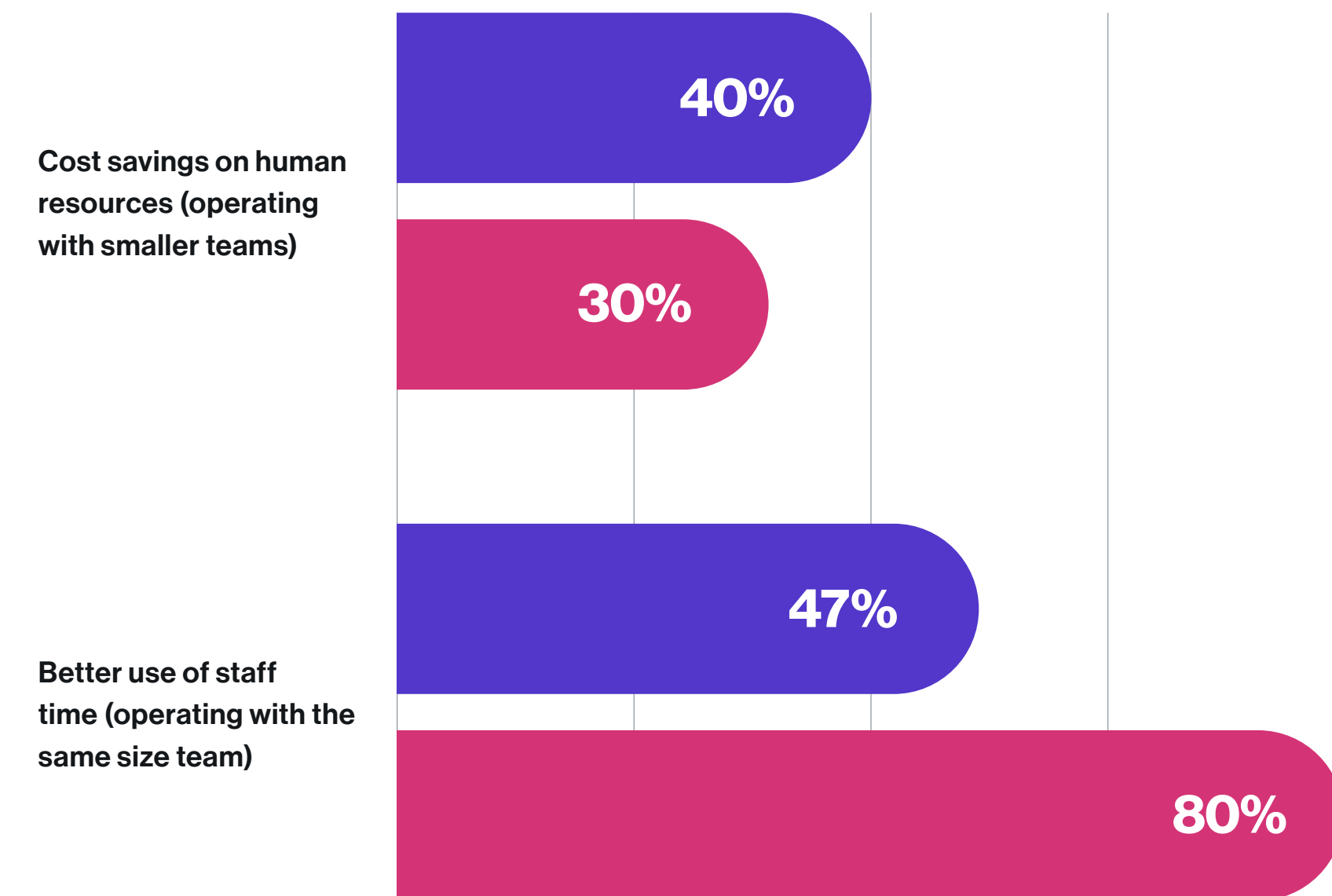
These tactical advantages are expected to translate to broader gains in efficiency and outcomes. We've already mentioned that most Leaders expect AI will deliver valuable time savings to existing staff. The leading companies surveyed also expect AI to increase response volume, make it easier to write responses, and increase win rates/revenue.

Interestingly, practitioners are far more optimistic than leadership about AI improving their productivity and efficiency. 80% of the bid and proposal professionals surveyed expect AI to empower them to better use their time, compared to fewer than half of the executives surveyed. Fewer than a third of practitioners are concerned about AI reducing the headcount on their team.

Practitioners are undoubtedly closer to AI use cases for proposal and capture activities relative to executive leadership, given that they're either employing the technology or experimenting with it daily. It's clear from the sentiment surfaced in this research that most bid and proposal professionals no longer have fears surrounding job security. Instead, they're excited that AI development will create an environment in which they can better thrive, delivering even more impact to the business.

## Impact of AI on bid and proposal team resourcing and efficiency

■ Executives ■ Practitioners



# Beware of consumer-grade chatbots

Despite the promise of AI, proposal teams are hesitant to use consumer tools for business-critical responses — which is particularly relevant given that 64% of respondents are seeing heightened risk in responses YoY (see page 8).

Companies have reservations about using AI chatbots like ChatGPT, Claude, or Gemini for strategic responses. Respondents are most concerned with leaking sensitive data, submitting fictional content that’s generated through AI “hallucinations,” and an elevated risk of using non-compliant content in responses.

## Top risks of leveraging consumer-grade chatbots\*

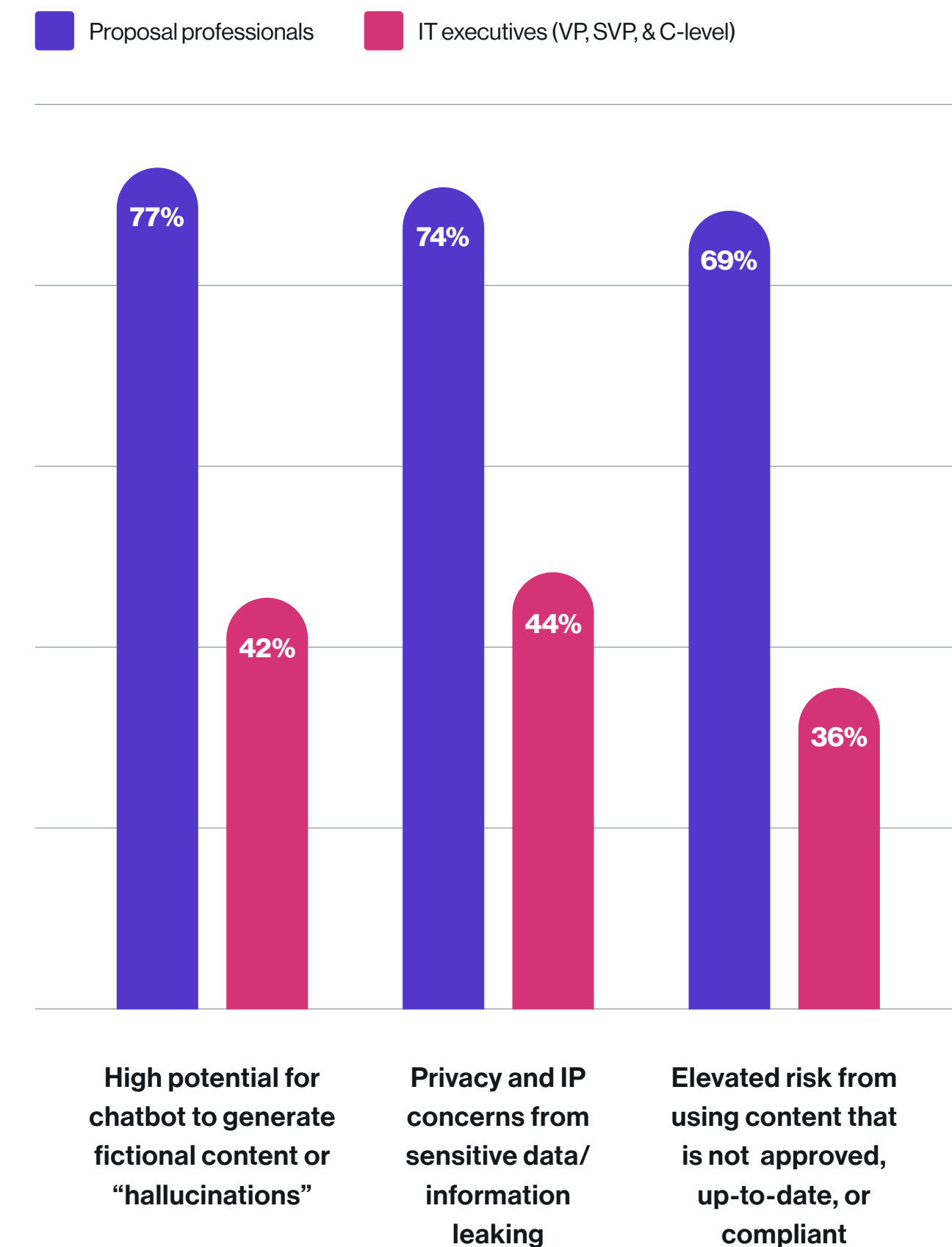
- 72%** Privacy and IP concerns from sensitive data/information leaking outside of the company
- 71%** High potential for chatbot to generate fictional content or “hallucinations” that end user does not detect
- 69%** Elevated risk from using content that is not approved, up-to-date, or compliant

\*Ranked as a top-five impact

Particularly interesting is the gap in concern between proposal professionals and IT executives. Bid and proposal teams are much more attuned to the risk of using consumer-grade chatbots. As RFPs, assessments, and questionnaires get longer and more complex, compliance becomes paramount — and more difficult. The vast majority of proposal professionals have concerns about data leaks, AI hallucinations, and non-compliant content. In comparison, these risks are on the radar of fewer than half of IT executives.

It’s important to note that the best AI-powered SRM platforms are also designed with privacy and ethics in mind. When assessing vendors, be sure to confirm that organizational data will not be shared externally to train AI models. Platforms of choice should have clear AI governance and documentation; these serve as guiding principles as the technology is developed and evolves.

## Greatest risks of leveraging AI chatbots for Strategic Response Management



# Companies with revenue growth are 3X more likely to use AI-powered SRM platforms

More than a third of all companies have yet to officially deploy any AI technology to support their bid, proposal, and capture activities. Many companies have been slow to roll out policies around using AI responsibly, so some teams may be hampered by their organization's lack of guidance.

**38%**  
**Experimenting with AI but haven't yet deployed anything**

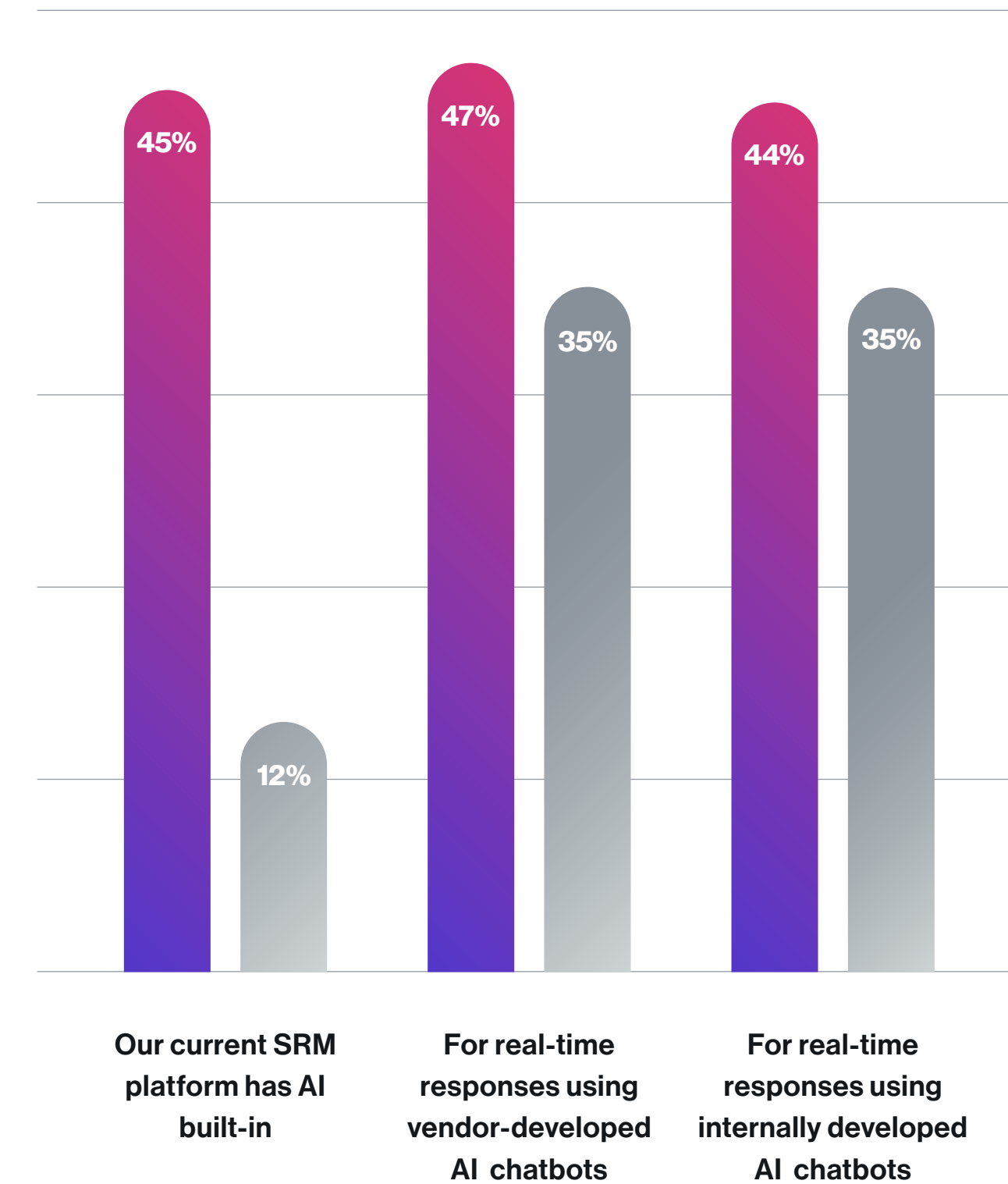
However, the opportunity for AI to bring advanced speed, efficiency, and accuracy to Strategic Response Management — and to subsequently catalyze faster growth — is immense, and companies at the forefront of AI adoption are seeing revenue climb.

Organizations experiencing revenue growth are more likely to be using GenAI-focused chatbots to help with real-time responses. Crucially, the largest AI gap observed between Leaders and Novices concerns AI-driven SRM platforms: almost half of Leaders are using these platforms, while only 12% of Novices are.

The best SRM platforms will have a slate of AI functionality that not only includes GenAI tools, but also critical AI-driven capabilities across automation, workflow management, content governance, project management, analytics, and more. These capabilities produce operational benefits that translate to real business outcomes. As evidenced by this survey, companies leveraging AI broadly through SRM platforms are seeing more revenue and faster growth.

## Current use of AI in Strategic Response Management

Leaders\* Novices\*\*



\*Revenue increased YoY \*\*Revenue decreased YoY

# Industry spotlight



**Andrew Mersman**  
Senior Director of  
Solution Consulting



## How has AI transformed the proposal function at Netsmart?

Our decision to adopt an AI-first solution was never a choice; it was a necessity. At Netsmart, complex external information requests increased by 94 percent. Embracing AI was essential for the proposal team to keep up with changing buyer expectations. AI that's natively integrated into our SRM platform has been a complete game-changer. By centralizing our content and ensuring everything is up-to-date, we've automated many aspects of the response process and improved our ability to make bid/no-bid decisions about new opportunities. Within our SRM platform, AI enables document shredding to identify key terms and automatically responds to requests by quickly finding and applying relevant answers from our content library. Tasks that used to take us five to ten minutes now take mere seconds. This efficiency has not only saved us time but has improved the accuracy and consistency of our responses. The initial implementation of AI streamlined our workflows and set a new standard for our proposal and response teams, enabling us to respond faster and more effectively.

## What was your strategy for increasing the adoption of AI?

We knew it was crucial to build a solid foundation before diving into more advanced AI capabilities. Our initial focus was on refining our Strategic Response Management processes and ensuring our content was accurate and current. This step was essential because a strong foundation without cracks allows for smoother uptake of advanced features. We were keen on building trust within our teams and ensuring proper adoption of the technology. Once we had that foundation in place, we could effectively expand our use of AI to draft and optimize the quality of our responses, which led to even more impactful and efficient responses. This approach helped us maintain efficiency and trust while gradually scaling up our use of AI capabilities.

## What benefits have you observed from using AI?

The benefits have been remarkable. AI has dramatically reduced the time it takes to craft winning responses. This efficiency has allowed us to respond to 63% more RFPs within just the first 10 months of implementing our AI-powered system. Additionally, we've reduced outdated content in our library from 45 percent to just 2 percent. When it comes to AI, the adage "garbage in, garbage out" is true! Improving the quality of our content was critical for the AI to be effective. The result has been faster responses that are more relevant and accurate. These improvements have directly contributed to increased revenue and win rates, all without adding to our team. AI, combined with SRM, has enabled us to win better and faster, setting a new standard for our Strategic Response Management practice.

# Five pro tips to unlock faster growth

# Five pro tips to unlock faster growth

The insights from this research reflect a bid and proposal management function in transition. Changes in buying behavior are putting pressure on companies to grow efficiently, prompting bid, proposal, and capture teams to transform from back-office support to frontline revenue generators.

It's time for organizations to embrace a new approach.



# Unlock growth with these five pro tips:

## 01. Influence

### **Elevate Strategic Response Management as a business-critical priority**

To position SRM as a strategic imperative, bid and proposal teams must earn a seat at the table where go-to-market strategies are set, alongside functions such as sales, marketing, revenue operations, and customer success. Strategic response leaders need to make a compelling business case for the resources they require as a critical part of the revenue engine — and deliver results that justify the investment.

## 02. Advocate

### **Change how your organization views the strategic response team**

Words matter: articulate the value of your bid, capture, and proposal team by sharing a clear charter describing the strategic role it plays, and define processes and responsibilities focused on driving revenue growth. Educate others to see the team as strategists and partners by tying their work to business outcomes.

## 03. Align

### **Drive executive and cross-functional alignment**

Ensure that there is two-way communication between senior leaders and strategic response teams. Involve the C-suite directly in key opportunities, and regularly share both topline impact and insights—providing actionable, data-backed recommendations to improve commercial success and product strategy. Bid and proposal teams should proactively educate and deepen relationships with executives, SMEs, and business partners, increasing the team’s visibility by ensuring that all stakeholders understand their roles and impact in the pursuit process.

## 04. Scale

### **Extend best practices with an AI-powered SRM solution**

Not all AI tools are the same. Use an SRM platform that leverages more than “off-the-shelf” GenAI. Look for capabilities like AI-powered content management, intelligent workflow automation, and strategic response insights to scale most effectively. Choose a platform with robust self-service content solutions that democratize company knowledge, which will increase the efficiency of bid and proposal team activities — and employee satisfaction across the board.

## 05. Measure

### **Define and report on the right metrics**

Track activity metrics like response time and volume to improve team productivity, but focus more on outcomes that matter to the business, such as revenue growth, win rates, return on investment (ROI), compliance, and employee satisfaction. SRM teams can elevate leadership and impact by going “beyond the numbers” to improve performance based on win/loss analysis, market insights, and emerging trends from bid and capture data.

# Industry spotlight



**Monika Pradhan**  
Business Services Strategist,  
AVP & Asst. Sec | Treasury  
Management Services  
Training and  
Communications



## What trends are you seeing in the industry?

Changes in our social environment are playing a major role in the bid and proposal space. We're getting more questions surrounding community outreach programs, diversity initiatives, employee wellness, and work-life balance. Prospective clients want to see a more well-rounded version of how an organization functions rather than predicating their decisions solely on the basis of your financial details and product overviews.

As clients and prospects request more details, we have to leverage more and better relationships — and figure out how to make things more efficient — because we have to conduct extensive data gathering and effectively manage content that is a mile wide and a mile deep.

## What does Strategic Response Management mean to you — and why is it so business-critical?

Leading our proposals team and having held a number of other revenue-focused roles in my career, I love the concept of Strategic Response Management because it captures how expansive our profession truly is. When we are managing major bids and pursuits, it reaches far beyond the team working on a response.

We have the opportunity to work closely with cross-functional teams and expand knowledge within the organization. Proposal teams really take the lead in developing a broad scope of connections. We bring people together and curate trusted, accurate, customer-ready responses. All told we add tremendous value by driving collaboration and standardization across the business — at scale.

We each hold a unique and dynamic role that is instrumental to our results. We are not just driving growth — we are helping the business understand which opportunities we should be prioritizing to make the most efficient use of company resources.

## What's weighing on your mind as you incorporate AI into your capture and proposal process?

We've entered the AI acceleration era, but for us, it's still new. The rapid emergence and pervasive advancement of AI is both a challenge and an opportunity.

It's a bit of the Wild West where few know the complexities and intricacies of what AI can do, which can be scary. What's happening on the back end? We don't know. We see things getting produced, but the details are still blurry.

I fundamentally believe that AI will cause a paradigm shift in how we do business — both within and beyond Strategic Response Management — but we are still figuring out how. It's an opportunity for us to lead and to get familiar with the technology so we can develop a model that allows us to improve our strategy, creativity, and relationships to add material value to the business and our customers. AI at its best will be an extension of our team at every step of the pursuit process.

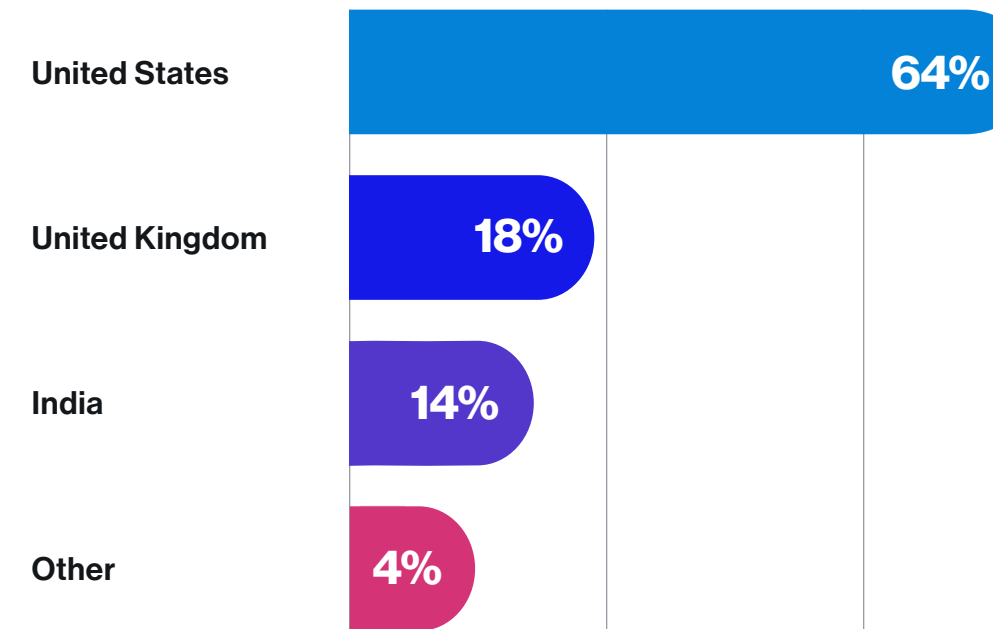


# Research methodology

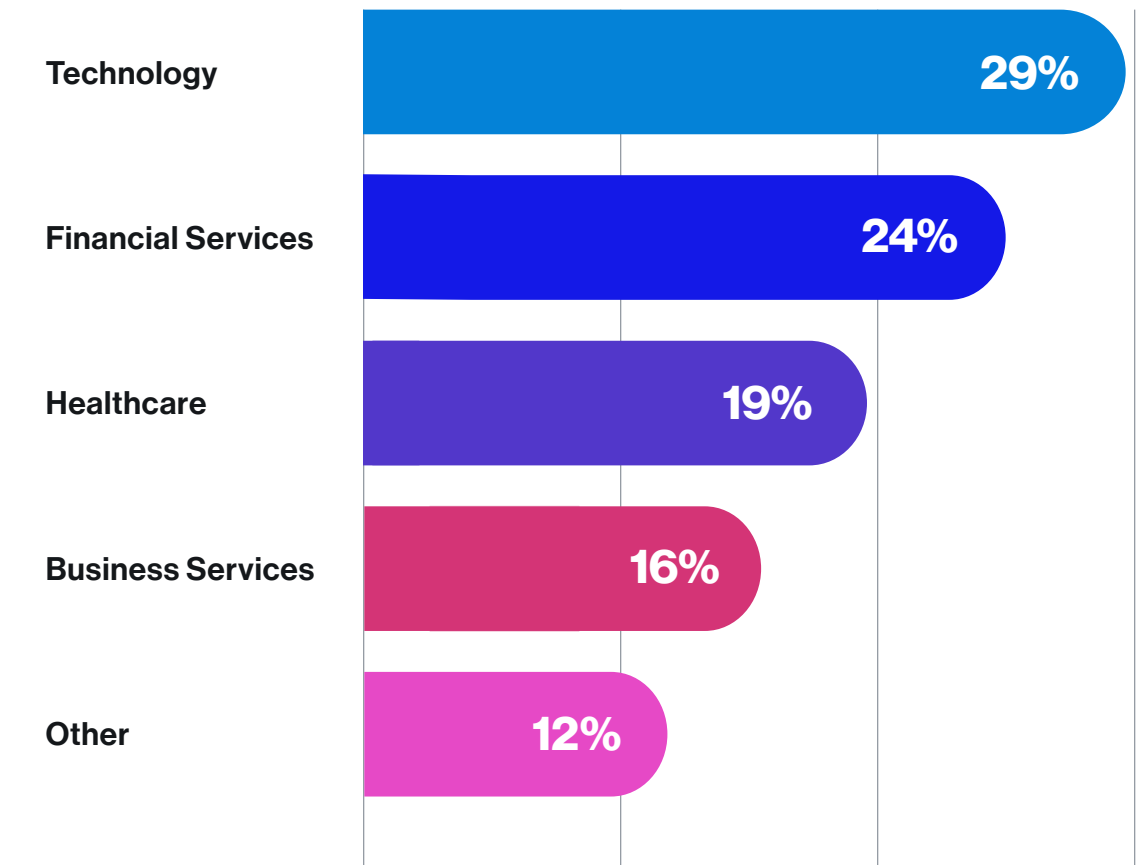
# Research methodology

This report is based on a global web-based survey of executives and practitioners who have ownership or influence over their company's response management activities and initiatives. The survey was fielded in May 2024 to 754 respondents in proposal management, sales, IT, and executive management roles with 250 respondents sourced from APMP membership and 504 respondents sourced by Callan Consulting. It was designed by Callan Consulting and Responsive.

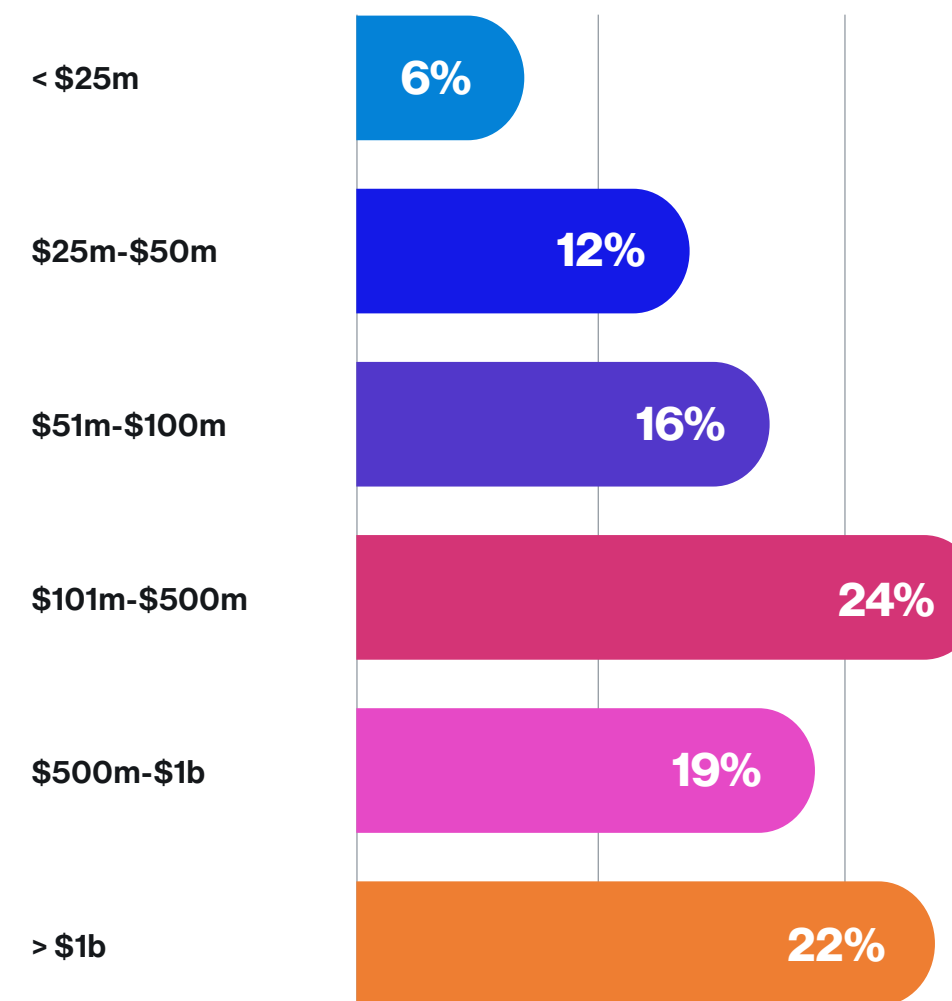
## Countries surveyed



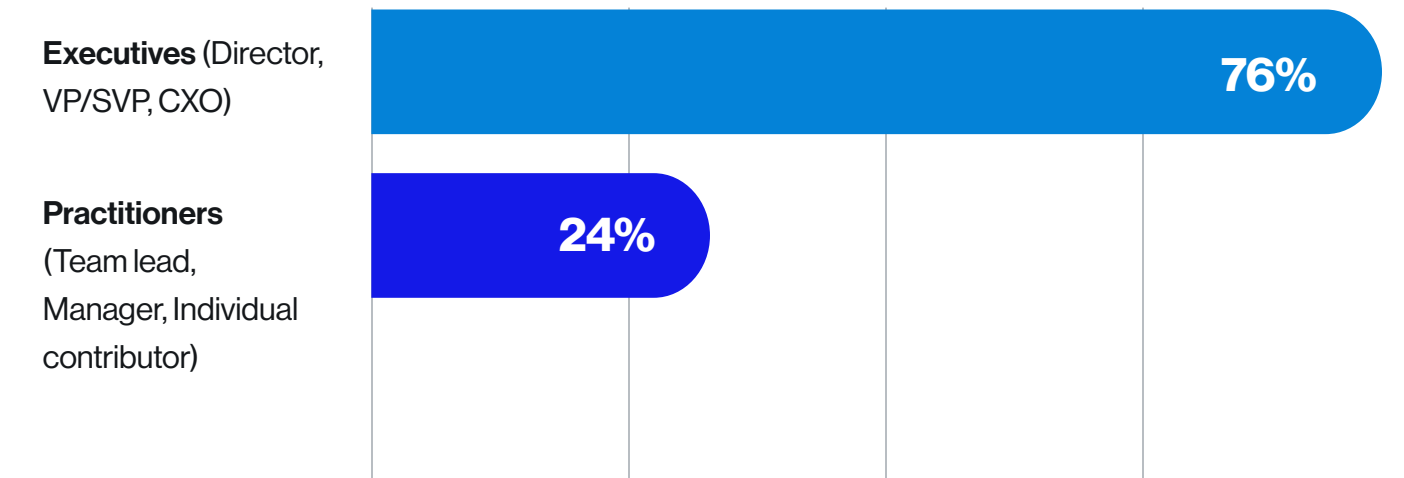
## Industries surveyed



## Revenue



## Job level



# How Leading Companies Are Winning More



**Responsive** is the global leader in Strategic Response Management software, transforming how organizations share and exchange critical information. The AI-powered Responsive Platform is purpose-built to manage responses at scale, empowering companies across the world to accelerate growth, mitigate risk, and improve employee experiences.

Nearly 2,000 customers have standardized on Responsive to respond to RFPs, RFIs, DDQs, ESGs, security questionnaires, ad hoc information requests, and more. Responsive is headquartered in Portland, OR, with additional offices in Kansas City, MO, and Coimbatore, India. Learn more at [responsive.io](https://responsive.io).



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