

The AI Handbook for Strategic Response Management

How to work smarter & win more

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Unlocking revenue through AI-powered strategic responses

With increasing competition and shifting market forces, it has never been harder to win business. Organizations must not only provide buyers with the information they seek, but also do so in an efficient, accurate, and bespoke manner. For companies that don't have the right tools and processes in place, keeping up with buyer demands feels like driving a golf cart on the Autobahn.

Bid, proposal, and capture teams are among the top drivers of company success. They are responsible for [nearly half of a company's revenue](#) — a fact that doesn't escape leadership. Yet, questionnaires and assessments from buyers and partners are growing in length, complexity, and frequency, putting additional pressure on these already strained teams. There's more competition and less time to make your business case. Without the right systems in place to generate high-quality responses quickly, organizations will soon find themselves on the outside of high-stakes deals.



Artificial intelligence (AI) is the most transformative tool for sales and proposal teams since the introduction of computers. When [Strategic Response Management \(SRM\)](#) is powered by advanced AI, it provides the tools and processes that field teams throughout an organization need to keep up with buyers' evolving priorities, while protecting company interests and improving employee experience.

Organizations have an imperative to embrace AI — and data which we'll explore in this handbook shows that even in these early days of adoption, the companies that are activating AI-powered SRM are seeing faster growth.

In this guide, we'll explore what these leading companies are doing differently and reveal just how transformative AI is in reshaping sales, marketing, and revenue operations.

We'll discuss

- The business impact of AI in SRM
- Using AI to accelerate deals — and win more of them
- A brief primer on AI
- Finding the right AI SRM platform
- The future outlook for AI in SRM

“Powering a company’s knowledge-sharing efforts with AI enables better responses, higher win rates, and greater revenue. AI-powered Strategic Response Management is changing the paradigm for buyer-seller information exchange, infusing customer acquisition and revenue generation with unprecedented speed, accuracy, and efficiency.”



Ganesh Shankar
CEO and Co-founder, Responsive

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01 The business impact of AI-led SRM

Today's buyers are more discerning and demanding than ever before. 750 B2B executives and professionals surveyed in the [2024 State of Strategic Response Management Report](#) by APMP and Responsive revealed that buyers are putting increasing pressure on companies as they evaluate more complex solutions.

Buyers today:

- Have broader sets of requirements and tighter budgets
- Expect faster response times
- Are looking for platform or multi-product solutions
- Have more complex buying committees

77% of bid and proposal professionals have seen their workload increase in the last year. More than one in four say the work associated with responding to RFXs, DDQs, security questionnaires, and other information requests has increased by more than 50%.

A lot is at stake. The research found that nearly half of company revenue is tied to RFPs, bids, tenders and proposals, with 70% of companies reporting a YoY increase in revenue generated through RFPs and other strategic responses.

77%

Increase in work volume for bids, assessments & questionnaires

48%

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

70%

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

Yet, strategic response teams are overloaded and under-resourced. Fewer than half (48%) of practitioners surveyed say that they are well-resourced and only 52% report high employee satisfaction. With so much revenue tied to these teams, failing to equip them with the tools and resources they need to cope with the staggering increase in customer requests poses an existential threat to businesses.

The most successful organizations are investing in their strategic response teams, and overwhelmingly, they're turning to AI.

“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.”



Rick Harris
CEO, APMP (Association of Proposal Management Professionals)



Strategic Response Management (SRM) refers to the people, practices, and technology that unlock organizational knowledge for profitable growth.

SRM brings together experts from across an organization to centralize and democratize organizational knowledge to drive more revenue while reducing business risk.

Traditional operating models lean on siloed teams and scattered information.

SRM breaks down these walls and streamlines collaboration and information sharing across all revenue-generating teams.

“For business leaders, Strategic Response Management 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.

Armed with AI, advanced analytics, and mature approaches to knowledge management and cross-functional collaboration, companies at the forefront of SRM adoption will continue to see outsized impact on revenue operations and gain key competitive advantages.”



Stephen Diorio

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

AI-led SRM drives unparalleled efficiency, collaboration, decision-making, and guided experiences at scale — empowering organizations to command an outsized competitive advantage while also enabling bid and proposal teams to maximize their impact.

How companies adopting AI are gaining an edge

AI-led SRM is quickly becoming essential for businesses looking to stay competitive. Its results resonate throughout an organization, enabling greater trust, revenue, and growth — and fewer silos.

According to the [2024 State of Strategic Response Management Report](#) by APMP and Responsive, AI-led SRM helps organizations:

Centralize company knowledge Nearly half of organizations have an overwhelming volume of siloed and scattered information	Close more business Companies with revenue growth are 3X more likely to use AI-powered SRM platforms	Diminish risk 64% of companies say they've seen the business risk associated with information exchange significantly increase over the last year	Gain better insights to improve product and go-to-market strategies Companies with the highest win rates use data analytics from response systems to inform business strategy	Enjoy more rewarding employee experiences 97% of companies that consider SRM important to their business saw an increase in employee satisfaction
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AI is the most transformative business technology since the internet. According to a recent [McKinsey report](#), nearly three-quarters of companies have adopted AI in at least one function. Both the adoption rate and number of use cases are on the rise.

The thirst for AI is clear: According to *The 2024 State of SRM Report*, 89% of companies are at least experimenting with AI, for everything from content generation to critical workflow automation. But we're still in the infancy of this potentially revolutionary technology, and many are still wondering what's possible today — and what's coming.

The use cases for AI across an opportunity lifecycle are diverse, and we'll dive into all of them in the next chapter.

"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."



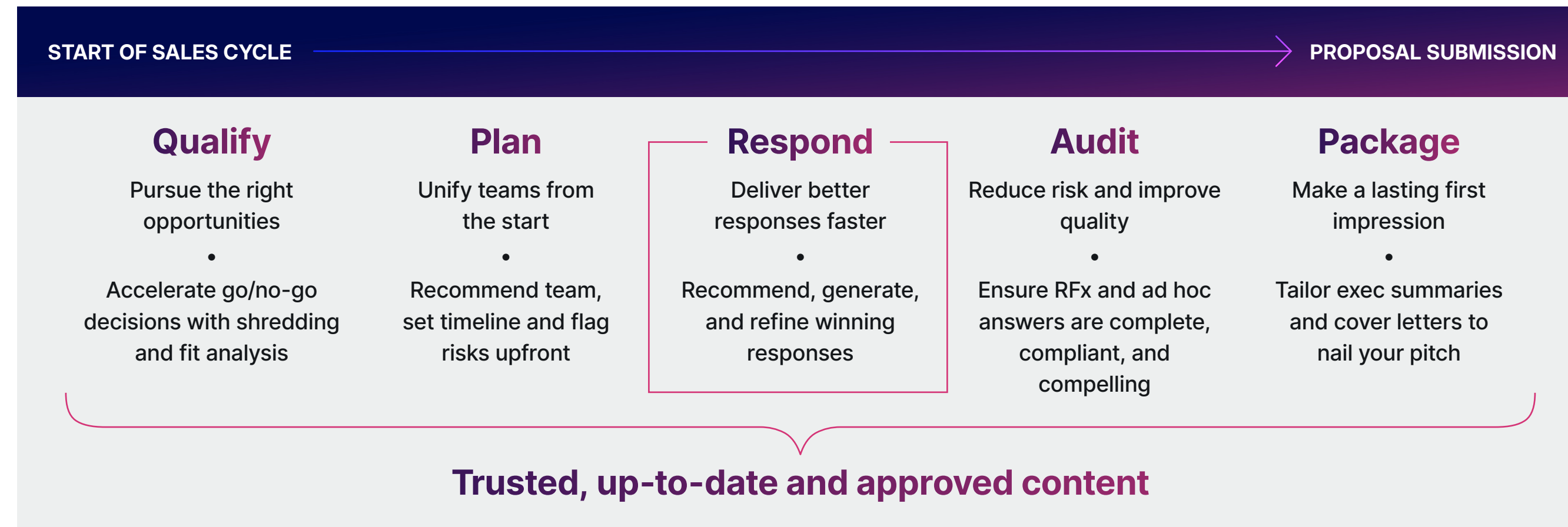
Monika Pradhan

Business Services Strategist, AVP & Asst. Sec |
Treasury Management Services Training and
Communications, First Citizens Bank

02 Using AI to accelerate deals — and win more of them

AI makes each step in the opportunity lifecycle more strategic and effective. Companies can use AI to centralize their knowledge; draft winning first drafts to bids, assessments, and questionnaires; and help sellers quickly and confidently respond to buyers' questions that are peppered throughout the process.

In theory, the lifecycle of a sales opportunity is neat and sequential — beginning with qualifying the opportunity and ending with winning it. For RFPs, the process may look something like this:



While these steps highlight the lifecycle of a major pursuit, the reality is much more complex. More specialized and lengthier questionnaires — coupled with expanded buying committees with diverse stakeholders — have turned the standard opportunity lifecycle into a cross-functional and collaborative process that can take several paths, requiring expert navigation from sellers.

“The average buying cycle involves three considered vendors, four separate departments, and eight buying group members, four of whom are outside the buyer’s company. In addition, the sequence of steps that buyers follow before they purchase varies and is rarely linear — meaning that their planned stream of tactics will rarely line up neatly with buyers’ processes.”

FORRESTER®

How organizations are using AI for SRM today

AI-driven SRM amplifies the usage of an organization's knowledge, leveraging it to fuel growth at every step of the sales process.

According to the [2024 State of Strategic Response Management Report](#), companies experiencing higher revenue growth are 3X more likely to use an AI-powered SRM platform, implementing AI throughout the pursuit process across a variety of use cases (which we explore in the next section). Those who stick to basic capabilities risk falling behind competitors who embrace a wider range of AI tools to transform how their teams qualify and win bids.

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

The use cases for AI in SRM today are largely scattered. But the anticipated promise for AI applications across the opportunity lifecycle is much more vast. According to the research, organizations expect that AI will impact SRM in the future by:

- 63%** Automating or simplifying content management
- 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%** Setting up project timelines, tasks, and review cycles with minimal user input

Let's explore the range of AI use cases that can drive revenue and results for your organization.



Use cases for AI in SRM

AI-powered SRM platforms **centralize knowledge across your organization** while uniting teams to both contribute to and use that knowledge across every type of strategic response, proactively and reactively addressing buyer concerns and questions. Every step of the sales cycle can be accelerated and improved with AI, including qualifying opportunities, automating workflows, summarizing requirements, crafting first drafts, managing content, improving compliance, and more.

Intake, analysis, and go/no-go decision making

Is it really an opportunity if it's not winnable or doesn't align with your business goals? AI can automatically shred RFX documents, saving hours, days, or even weeks of work.

Tools like [Responsive Requirements Analysis](#) will extract requirements and other information to create various matrices, including a compliance matrix, capability matrix, requirements matrix, evaluation checklist, and more. AI can also process hundreds of pages to create concise summaries, instantly identify key requirements to accelerate evaluation, and generate lists of acronyms and their definitions to simplify the navigation of complex RFXs.

The impact

Strategic response teams not only save valuable time by automating the document shredding and intake process, but they can also quickly conduct fit analyses to avoid spending time on unwinnable projects or opportunities misaligned with organizational goals. As a result, sales and proposal teams spend more time crafting winning, personalized responses and tracking proposal requirements to ensure compliance and prevent disqualification.

First draft

First drafts are time-consuming and repetitive, given that discrete buyers often ask similar questions. Most response professionals would much rather fine-tune responses than manually tackle questions they've seen many times before.

AI will instantly complete a draft response to questionnaires with the push of a button. To do this, AI scans your entire knowledge base to access the answers to nearly identical questions from stored Q&A pairs. For new questions your organization hasn't fielded in the past, AI plays the master curator of your content library, deducing the context of the question and drafting meaningful responses from your trusted content. The best platforms will also customize responses to fit a specified voice and tone.

Should there not be adequate content in your knowledge base for the AI to confidently respond to a question, the SRM platform will flag the question for the bid or proposal manager, who can then assign it out for SME input.

The impact

AI accelerates project timelines and improves cross-functional collaboration. When a proposal manager takes a draft as close to completion as possible with AI, they protect subject matter experts' (SMEs') valuable time. AI not only reduces time to first draft by as much as 80% but also reduces the number of questions that a proposal manager will need to assign out to SMEs.

"We were able to reduce the time maintaining our Content Library by 50% through the elimination of writing/editing tasks involved in each RFP response, and AI has contributed to our increasing win rate."



Autumn Wenner
Content Proposal Specialist at JAGGAER

Content generation and refinement

Beyond the first draft, AI can be leveraged to significantly speed up the writing and editing process.

GenAI tools compose answers quickly using prompts (i.e., directions you give to the AI to execute). Some platforms will allow you to automatically refine and personalize answers with pre-built prompts such as “rewrite,” “elaborate,” “shorten,” and “passive-to-active voice,” for example. The best SRM platforms are advanced enough to process custom prompts, like specifying a word count or tuning tone.

The impact

Whether you need to craft new responses to questions you haven’t fielded before or you need to refine what’s already written, an AI-powered SRM platform acts as your personal copywriter. From a single input, AI can craft a response that’s compliant, on-brand, and personalized for your targeted audience.

“It could take five to 10 minutes to manually find something in the library or to take two things and merge them together. With [Responsive] AI Assistant, it is actually answering, on average, our questions in 30 seconds.”



Andrew Mersman
Senior Director of Solution Consulting at Netsmart

Intelligent workflows

Strategic response projects are complex, requiring teams to manage multiple tasks and processes simultaneously. Siloed and distributed workforces create bottlenecks and delays. AI-powered SRM platforms will automate critical workflows and do the heavy lifting in project management.

Leading AI-powered SRM solutions should also include technology that matches question assignments to the ideal subject matter expert (SME) based on that SME's area of expertise and available bandwidth. AI-powered workflow automation makes assigning questions to SMEs seamless and intuitive, and GenAI-powered drafting and editing capabilities reduce the workload for both proposal managers and SMEs.

The impact

Automating task assignment and workflow management reduces manual coordination, leading to faster response times and higher output quality. By intelligently matching tasks to SMEs, SRM platforms ensure that each question is handled by the best person for the job. With AI managing workflows, teams can communicate more effectively, reducing the friction often associated with cross-functional collaboration.



Knowledge management

Scattered and poorly managed company knowledge affects every function across an organization. At best, it sends people scrambling to find the right information, and at worst, it exposes companies to risk.

An AI-driven SRM platform is an invaluable partner to knowledge managers, helping ensure information is accurate, compliant, and easily retrievable. When ingesting new content, AI can be deployed for auto-tagging, organizing knowledge in a coherent manner. To reduce redundant, obsolete, or trivial (ROT) content, intelligent workflows can automatically surface specific items to review, flagging information that puts the integrity of the knowledge base at risk.

The impact

By proactively identifying ROT content, AI helps maintain a clean, accurate, and reliable knowledge base. This reduces the risk of misinformation, enhances compliance, and supports better content governance. It also supports a more effective deployment of AI. The relationship between content management and response quality is indisputable: trusted, up-to-date content is the foundation upon which GenAI is deployed. Ultimately, AI-supported content management in SRM platforms creates a single source of truth for company knowledge, making it simple for anyone to find the trusted information they need.

“Content management capabilities allow our team of content managers to effectively manage more than 18K pieces of collateral. Moderation and review workflows allow our team to work directly with SMEs and control the flow of information to our more than 13K users around the globe.”



Amanda Heather
Business Program Manager & Content Lead at Microsoft

Elevating compliance and reducing business risk

AI-driven SRM systems can cross-check responses against regulatory guidelines, automatically flagging discrepancies or outdated information and thereby providing an extra layer of assurance that every piece of content is accurate and up-to-date.

Moreover, these platforms enhance transparency by automating detailed audit trails and documenting every change and update. AI-powered SRM systems can provide insights into who made changes, when they were made, and why, creating a clear line of accountability.

The impact

By automating these processes, AI not only beefs up compliance but also saves valuable time and resources that would otherwise be spent on manual checks, allowing teams to focus on crafting responses that are strategically aligned with business objectives.



Improved quality and personalization

Shorter timelines mean less time to give prospects the personalized experience that helps close deals. AI-powered SRM enhances response quality and personalization by automating the process of tailoring content to meet the specific needs of each prospect. With AI, responses are not just generated faster; they can be crafted with precision, aligning closely with the language, tone, and requirements of your target audience.

The advantages of AI are stackable: The efficiencies and gains offered by AI and described above across content management, SME collaboration, and content generation consistently improve your knowledge base.

This content library is the spine of your AI-driven SRM processes—because AI consistently improves your content library, the power of your responses, bids, and proposals is continuously strengthened.

The impact

By regularly refining your knowledge base and drawing on the most relevant, high-performing content, AI enables each automatically generated response to be accurate, compelling, and targeted. Additionally, dozens of hours of work done by AI across a proposal or response lifecycle means that this valuable time is now freed up for bid and proposal professionals to play a more strategic and impactful role. With more time, bid and proposal managers can thoughtfully customize responses for every opportunity and complete more responses without additional headcount, driving more revenue for the business.

“We track the amount of time people spend in each project and compare that to our win-loss report. When people spend more time and effort customizing, that’s where we see increased wins.”



Beth Bissell
Global Bid Management Team Lead at Stibo Systems

Knowledge retrieval

The best AI-driven SRM platforms will democratize on-demand knowledge retrieval across your entire organization, enabling field teams to independently search for answers via conversational AI in order to answer questions as they arise. These systems utilize natural language processing (NLP) and machine learning algorithms (more on these in the next chapter) to understand the context behind questions, allowing users to find the most relevant and high-quality content quickly.

This functionality is key to driving the broader impacts within SRM that go beyond traditional proposal management or responding to questionnaires. AI enables any team member to tap into trusted organizational knowledge to answer any ad hoc questions from anywhere.

The impact

AI eliminates the time-consuming task of manually chasing down answers. Technology like **Ask by Responsive** equips all customer-facing teams with access to a conversational assistant to address buyers' questions with current, compliant organizational content. This not only gives employees agency but also reduces the time to response, significantly improving the experience delivered to customers and prospects.

Enabling field self-service also allows the proposal team to shine. As Carrie Jordan, Global Director of Proposals serving Microsoft's Proposal Center of Excellence, observed, "Without being bogged down by internal information requests [by sales], 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"

Delivering guided experiences for prospects

Organizations can transform how buyers interact with their content by leveraging virtual assistants that navigate through dense documentation like security and compliance information. These AI tools provide an intuitive, interactive layer that helps prospects quickly identify relevant information, answer specific questions, and clarify any uncertainties without the need for manual searches.

These guided experiences are particularly valuable for complex and lengthy documents where buyers may struggle to find the most critical information (like detailed product information, ESG disclosures, and risk assessments such as CAIQ, ISO27001, and VSA).

The impact

By turning static proposals into dynamic, interactive experiences, AI transforms the buyer's journey, making it more engaging, efficient, and aligned with their decision criteria. Given the novelty of this application of AI (available in [Responsive Profile Center](#)), early adoption ensures you gain an outsized edge over your competition when it comes to delivering standout experiences during the sales process.



Looking ahead: Driving commercial strategy and navigating change

Technology has already begun to shift the role of bid and proposal teams from “get it done” to “prioritize opportunities for profitable growth.” AI will empower teams to be more discerning, bringing in additional bid and market intelligence that helps proposal teams capture and win more opportunities — and more of the right opportunities.

Elevating beyond the initial fit analysis and go/no-go decisions, AI will help identify nascent opportunities that shape growth strategies and customer engagement. It will help organizations unlock new markets based on trends from emerging regions or verticals — and anticipate and address customers’ questions earlier in the sales process.

The impact

While some teams already operate this way, AI can analyze data at a level of speed and precision previously unimaginable so that bid, proposal, and capture teams can surface insights that directly contribute to company and GTM strategy, earning them a bigger seat at the table and guiding their organizations through the complexities of an ever-changing market.



03 A brief primer on AI

Our fascination with artificial intelligence (AI) can be traced back to centuries of study of the brain and how our minds think. This captivation laid the groundwork for formalizing AI as a science — specifically a computer science — alongside the emergence of computing in the 1950s.

Modern-day computing and data science are founded on the Turing Machine, a mathematical model constructed by Alan Turing, who is considered the father of AI. Turing is perhaps best known for his code-breaking during World War II, during which he invented a machine known as “the Bombe” to crack messages the German armed forces assumed were secure.

After the war ended, he continued developing the theories he’s most famous for today, including the Turing Machine and the Turing Test. This test measures a machine’s ability to mimic behavior indistinguishable from a human’s. His work provides the fundamentals for machine learning (ML) and natural language processing (NLP), core branches of AI that form the basis of the technology powering many business applications, including AI-driven SRM platforms.

AI — and specifically GenAI — arguably became the talk of the town when OpenAI made a splash by making its ChatGPT publicly available in late 2022. The technology quickly captured everyone’s imagination and exploded in impact. Millions around the world began experimenting with its capabilities to explore use cases that ranged from complex coding to building grocery lists.

Though ChatGPT may be credited with making AI broadly accessible, the reality is that complex, modern-day AI has been operating under the surface in everyday technology we’ve been using since the 1990s. Strategic Response Management (SRM) is no exception. While conversations around AI-supported SRM have picked up steam in the past couple of years, its origins can be traced back to the start of the [Responsive Platform](#) in 2015.

Most people don’t need to fully understand the details of the technology behind their user experience, but the sophisticated AI engine behind an SRM platform automates key processes and amplifies potential use cases, so it’s worth having a high-level understanding of what goes on “under the hood.”

Let’s dive into a primer on AI.





Making sense of the AI alphabet soup

Even the simplest, most user-friendly AI applications (like GenAI chatbots) either live on top of or are trained by more advanced technology. Here are the essential ones.

Traditional AI

Traditional AI – sometimes referred to as Narrow AI – focuses on performing discrete tasks via preset algorithms or rules. These AIs rely on rule-based systems, but they won't create anything new. They sound simple, but they are immensely powerful, providing the foundation for a slew of AI capabilities within an SRM platform, including:

Automating repetitive tasks

For example, Traditional AI can automatically categorize an RFX during the intake process by industry, size, or other criteria, and then assign the RFX to appropriate team members based on their expertise.

Recommending relevant content

Using a series of predefined rules that mimic human decision-making, recommendation engines can recommend the most relevant content from a centralized content library based on the context of an RFP or customer question.

Simplifying workflow management

Traditional AI will automatically trigger workflows when certain conditions are met, like when an RFP is submitted or when internal approvals are completed, helping speed things up.

Improving response quality

Brands have rules, and Traditional AI can ensure they're enforced. These systems will guarantee all responses align with brand guidelines, messaging, and compliance standards, automatically flagging deviations.

Predicting bid outcomes

Traditional AI uses historical data to predict the likelihood of winning a bid based on certain parameters, such as industry type, business size, or past outcomes.

Machine Learning (ML)

Machine learning (ML) goes beyond the preset rules of Traditional AI and involves training algorithms on data so they can learn patterns and make decisions without being explicitly programmed. It forms the backbone of many AI applications by enabling systems to improve over time based on feedback and new data.

ML models continuously adapt to new information, making them more dynamic and responsible. They surface in the following SRM platform capabilities:

Data-driven content recommendations

ML applies historical data and user behavior to suggest the most relevant content for any question. For example, ML algorithms can analyze past RFPs, responses, and win rates to identify which content blocks are most successful in specific contexts — helping improve win rates over time.

Better writing

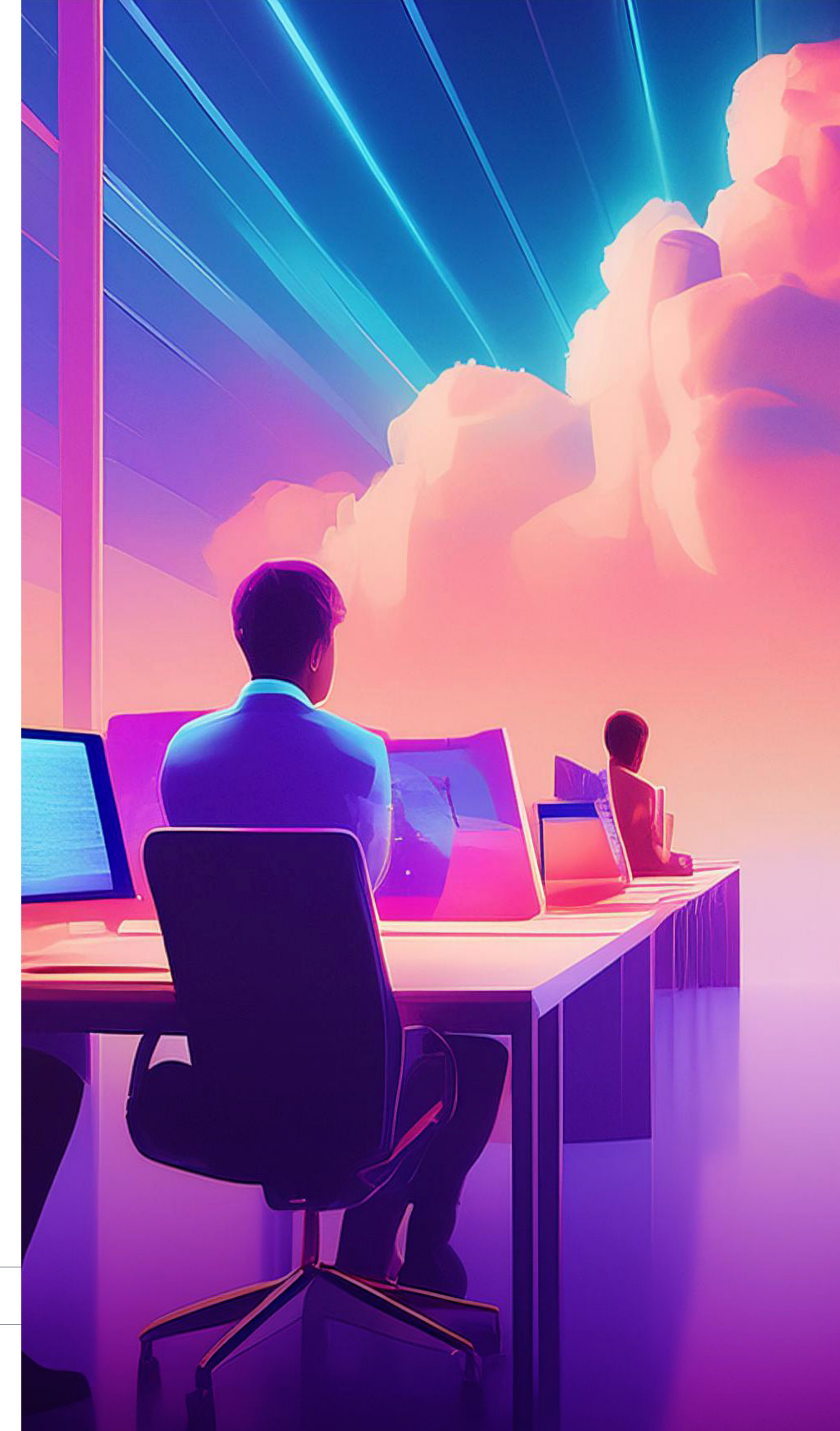
ML algorithms can learn from past proposals and successful bids to pinpoint what kind of language, tone, or format is most effective. For example, if a particular writing style (e.g., bulleted lists) has historically resulted in higher win rates, the system can suggest similar approaches for new proposals.

Strategic decision-making

ML takes predictive analytics a step further by using more sophisticated models like regression analysis, decision trees, and even neural networks to forecast the likelihood of winning a bid. It can consider broader variables, including competitor analyses, client sentiment, and industry trends, to provide more nuanced and accurate predictions.

Dynamic workflow optimization

Unlike Traditional AI, which relies on fixed rules to trigger workflows, ML-based systems can dynamically adjust workflows based on evolving data. For example, the system can learn which team members deliver the fastest and highest-quality responses and automatically prioritize tasks accordingly.





Deep Learning

Deep Learning is a more advanced subset of ML that uses artificial neural networks with multiple layers (often called “deep” networks) to model complex patterns in data. These models can automatically learn intricate patterns and relationships from large volumes of unstructured data, such as text, images, and even speech.

Here’s how Deep Learning transforms SRM processes:

Automated summaries

Deep Learning models can summarize complex and lengthy documents, like government-issued RFPs, and extract key points and requirements while generating document summaries, saving hours.

Compliance matrices

These AIs can analyze non-text data like images, charts, and diagrams and automatically flag any content that might pose a compliance risk or need further review.

Real-time language translation

For organizations pursuing opportunities globally, Deep Learning models will translate content into different languages while preserving context and meaning.

Generative AI

Generative AI (GenAI) focuses on creating new content from existing data. It’s fundamentally different from Traditional AI, Machine Learning, and Deep Learning, as those models cannot generate entirely new content.

GenAI’s ability to create human-like content and engage in natural language conversations offers several advanced functionalities across SRM:

Conversational AI for real-time assistance

GenAI powers virtual assistants that can assist strategic response teams and prospects in [navigating responses in real time](#). These AI tools can answer questions, suggest content, and even tailor responses.

Creative brainstorming

Everyone gets writer’s block. GenAI can get the gears turning by suggesting new angles, narratives, and approaches.

LLMs & SLMs

Large Language Models (LLMs) and Small Language Models (SLMs) are a class of GenAI that leverage vast amounts of data to understand and generate human-like language. They are trained on billions of parameters to grasp context, nuances, and semantics.

LLMs are larger and more general than SLMs, which are trained on domain-specific data and designed to serve a specific purpose (like writing responses to security questionnaires, for example).

Both can be viewed as the brains behind native GenAI SRM technology. They deepen GenAI's functionality by adding contextual understanding and customization across SRM.

Contextualized content recommendations

LLMs and SLMs analyze the context of each question to suggest the most relevant content from the knowledge base. By understanding nuanced language patterns and specific terminology, these models ensure that responses are both customized and aligned with the requester's needs, improving both efficiency and personalization.

Enhanced proposal drafting and editing

SRM platforms can generate full-length drafts for proposals, bids, and other responses in minutes by leveraging LLMs. They can even highlight areas where additional input from SMEs may be needed, creating a refined draft that balances automation with human insight.

NLP

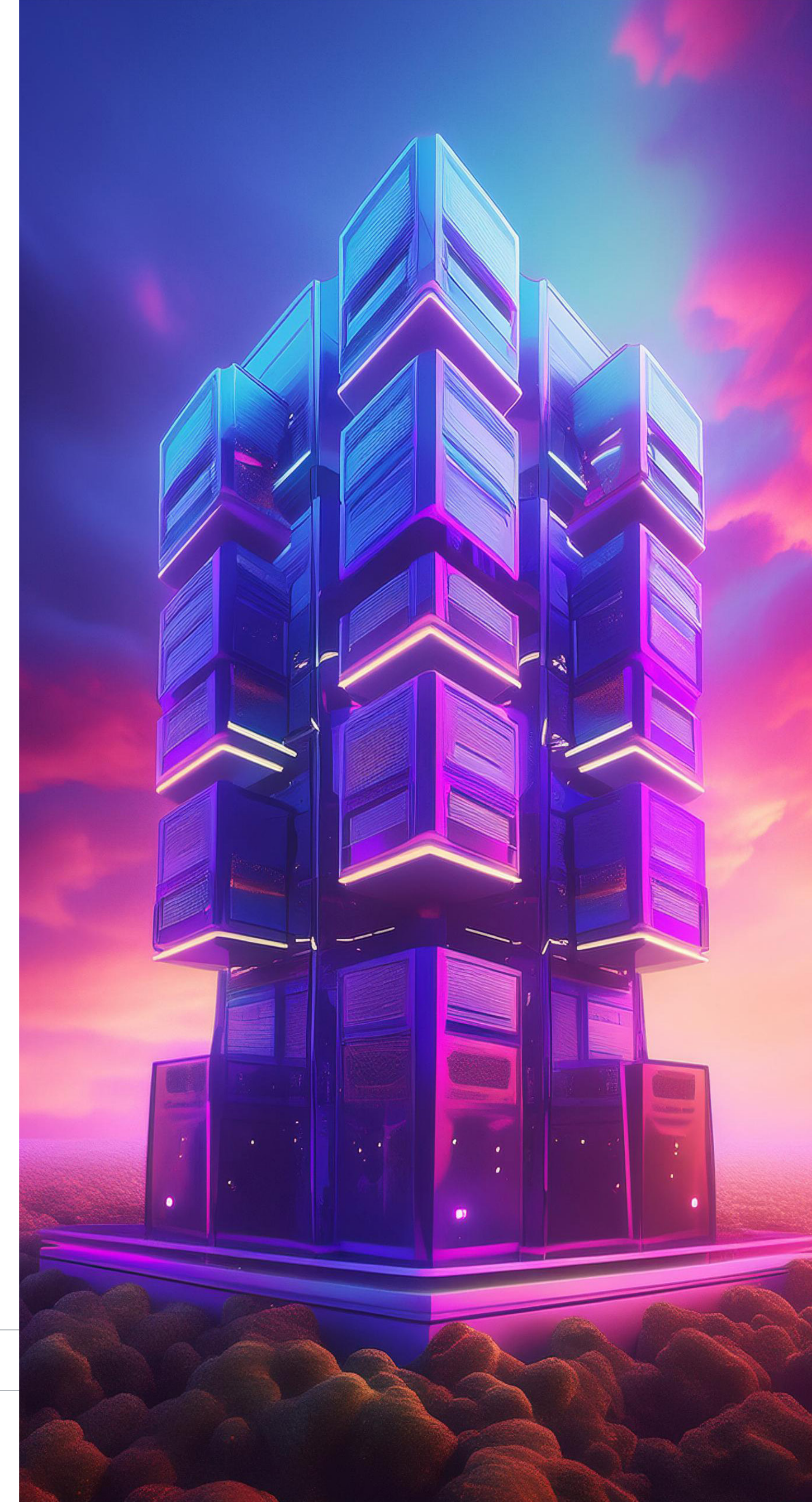
Natural language processing (NLP) enables computers to understand, interpret, and respond to human language. SRM is all about communication and exchanging information, so NLP is foundational to many of the AI models explored here and deployed across SRM platforms.

Automated question-answer matching

NLP, together with ML, powers semantic search, which can analyze the language of any question to deduce context and match it with the most relevant response from your content library. By understanding intent and context, semantic search ensures accurate and appropriate content suggestions, reducing the manual effort needed to search for relevant information.

Data extraction

NLP can identify and extract essential data points from long documents, such as names, dates, dollar amounts, and compliance terms. This automates and drastically shortens the process of pulling out critical details for go/no-go decision-making, compliance checks, or legal review.



Humans at the helm; AI at the ready

AI is certainly a game-changer in SRM. It's already proven to be an immense time saver and productivity booster.

However, it cannot operate in isolation. When the conversation around AI first heated up, many bid and proposal professionals feared the technology would supplant them. But research from APMP and Responsive's [2024 State of Strategic Response Management Report](#) revealed that AI is not a threat to employment. Instead it's only a threat to those too slow in AI adoption or those who don't figure out a way to incorporate AI meaningfully.

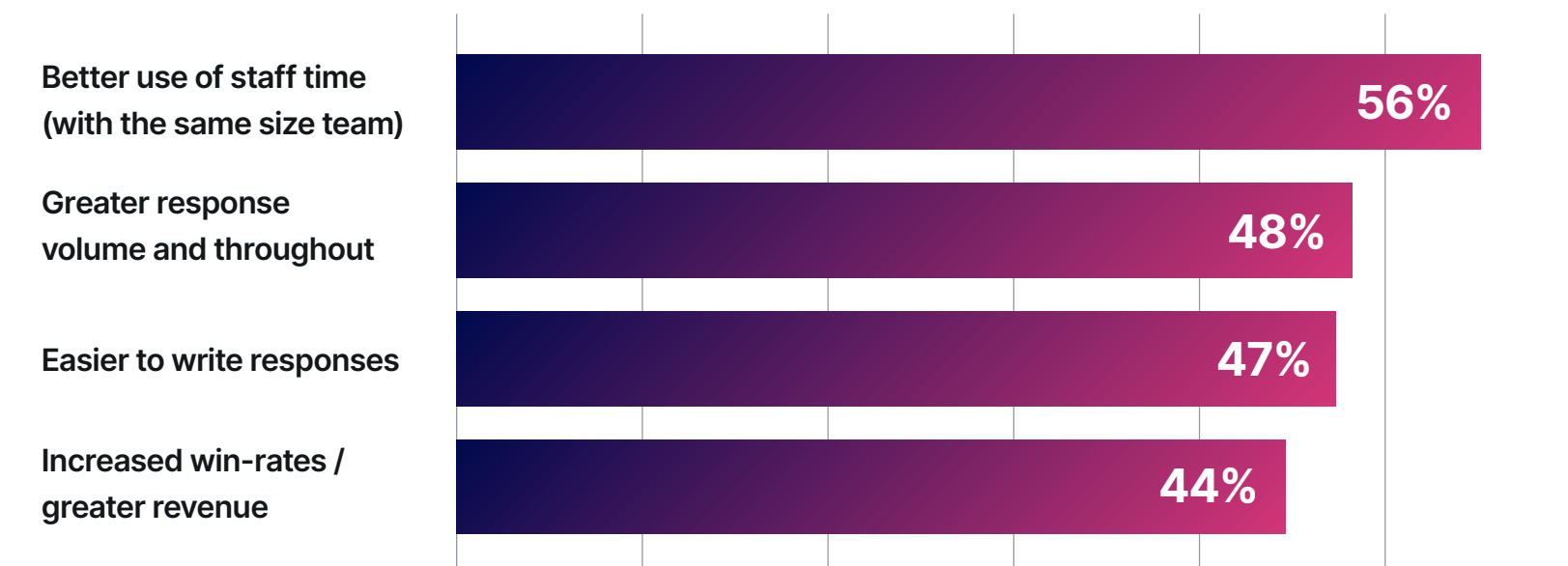
Among companies with the highest win rates (designated as "Leaders" in the report), AI is seen as augmenting human input rather than replacing it. According to those surveyed, the top expected impact of implementing AI in SRM is that it will optimize the use of staff time while operating with a team of the same size.

"One thing AI can't do – and I don't think we'll ever get it – is having emotional intelligence. When you read something that's quite lengthy, that's been written solely by AI, it can come across as soulless. It will be compliant. It will answer the question. But it just doesn't have that passion that a human can bring to something. And it doesn't have the capacity to really understand the customer on a human level and personalize responses beyond just curating relevant information."



Melinda Bunston
Chief Executive Officer, APMP UK | Senior Capture Manager, QinetiQ

Leaders' anticipated impact of AI in Strategic Response Management**



**Companies with win-rate >60%

It makes sense that those on the frontlines of SRM are AI's biggest champions. Those who use AI every day are also familiar with its limitations — the most significant of which are that it lacks human nuance, creativity, and empathy. Humans will always be essential, even when AI is leveraged heavily. The SRM human/AI interplay can be described this way:



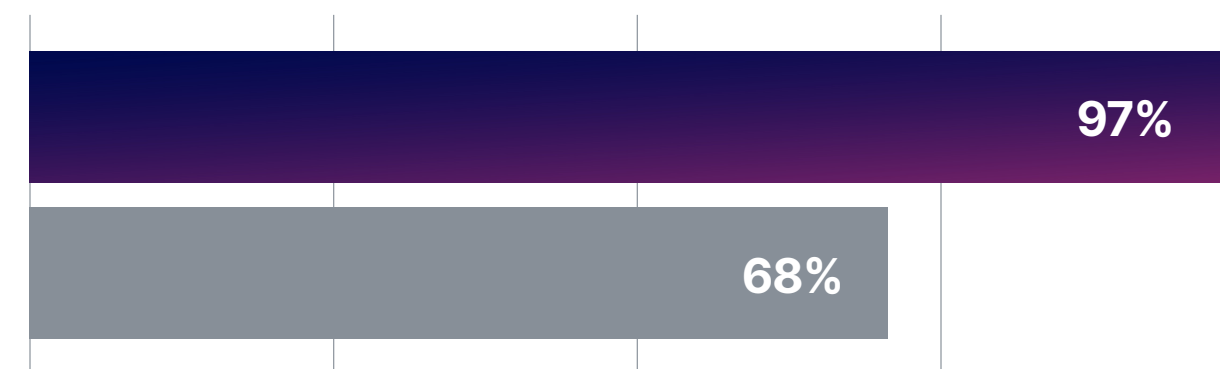
04 Finding the right AI SRM platform

There are many response management products on the market, but most are limited in scope. Some are just point solutions, addressing only a subset of needs within SRM (e.g., they can only help with RFPs).

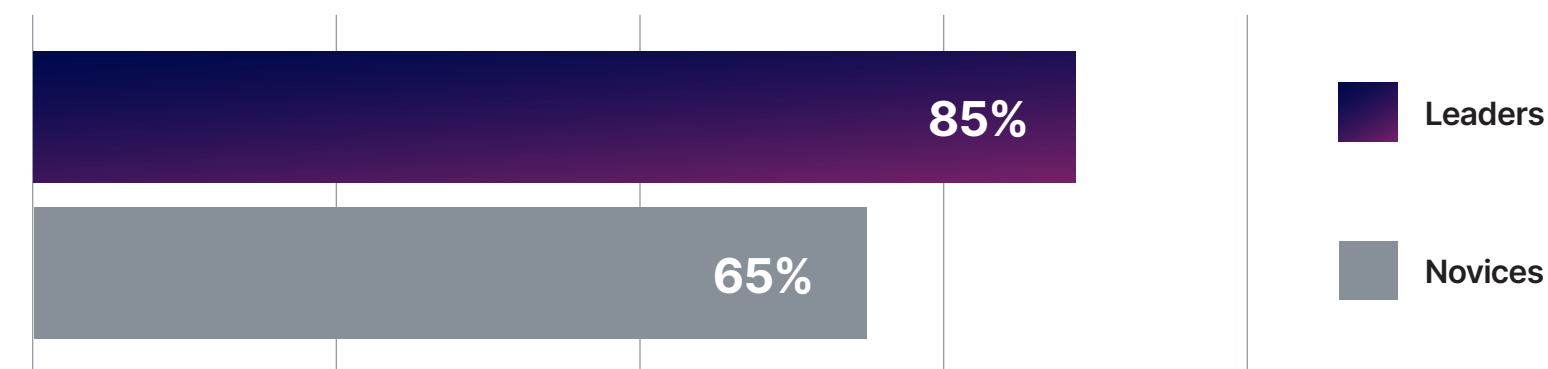
Others are broader, but their AI capabilities may be limited to only GenAI, aiding with content generation but offering no efficiency gains in the full scope of SRM operations. In addition, AI solutions that focus solely on the power of GenAI without sufficient consideration for content management, task management, and collaboration will ultimately deliver limited value.

If your organization hasn't already adopted an SRM mindset, you're falling behind. According to the [2024 State of Strategic Response Management Report](#), companies experiencing higher win rates and employee satisfaction are far more likely to deem SRM an organizational priority and recognize strategic response teams as impact players in shaping GTM strategy.

Strategic Response Management (SRM) considered important



Strategic response teams shape GTM strategy



Critically, leading organizations are winning more by adopting an AI-powered SRM platform. The study found that companies experiencing revenue growth are **3X more likely** to use an AI-powered SRM platform to power the orchestration of questionnaires, bids, and inquiries with prospects, clients, and partners.

“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.”



Danelle Morrow
CF. APMP, Award-winning
GTM Executive &
Transformational Leader



Transforming an existing response infrastructure with AI-powered SRM requires a thoughtful and strategic approach. Here's a step-by-step process to ensure seamless integration and adoption throughout your organization.

The implementation roadmap for an AI-powered SRM Solution

1. Align your SRM strategy with business goals

- Identify the key objectives for implementing SRM. These may include increasing win rates, becoming more efficient, delivering more accurate responses, mitigating risk, driving revenue, and more.
- See where SRM fits into broader organizational goals to gain cross-functional support.
- Bring key stakeholders into the discussion before selecting potential vendors to underscore the necessity of SRM at your organization. SRM functions optimally when there is alignment and cross-functional buy-in, including across revenue, operations, marketing, legal, IT, security, and legal teams.

2. Assess technical requirements and identify integration must-haves

- Thoroughly analyze existing response systems and workflows to identify areas where AI might have the most impact. Are manual processes slowing down response times? Which workflows are repetitive and could be automated?
- Assess existing data infrastructure to identify content locations and quality. How is content being surfaced and vetted?
- Examine current technical infrastructure to ensure seamless integration and data flow. Which tools are external teams working in?

3. Choose the right tech partner

- Research AI-powered SRM platforms to determine their expertise in your desired functionality, such as document shredding, project management, proposal generation, and content management. This step may require an RFP.
- Assess AI-powered SRM platforms' scalability, security, and compliance to ensure they meet organizational and governmental requirements and can meet future business needs.
- Ensure that AI models respect user and company privacy and that data is never shared outside the organization. Confirm your chosen vendor has robust AI governance in place.
- Look for partners that offer extensive onboarding and ongoing support services. SRM will be most effective if you achieve organization-wide adoption.

4. Obtain stakeholder buy-in

- Develop a clear business case highlighting the ROI, efficiency gains, and risk mitigation benefits of the specific AI-powered SRM solution you choose.
- Determine what specific metrics your organization wants to achieve and how your team can meet those goals using the chosen AI-powered SRM solution.
- Arrange demos and pilot programs to illustrate value and functionality.
- Involve legal counsel to advise on privacy concerns.

5. Democratize knowledge across the organization

- Create cross-functional teams to foster knowledge-sharing across various subject matter experts and content users.
- Perform a content audit to help ensure access to the latest and most accurate information.
- Instill a repeatable content review process to ensure your information repository is up-to-date and mitigates risk. SRM solutions with AI-powered functionality can automate most of this process.

6. Drive adoption

- Implement change management strategies to address resistance. These include proactive stakeholder engagement, clear communication, and addressing concerns to foster a smoother transition to new technology.
- Launch training programs and workshops to build AI and overall platform literacy, focusing on collaboration, content management, and AI optimization.
- Integrate SRM platform training into new employee onboarding.
- Set clear expectations, such as fluency timelines.
- Establish ethical guidelines.





Think like a CIO: The top 8 questions you should be asking

Before introducing another platform to your company's tech stack, any CIO would thoroughly evaluate it by asking critical questions to ensure it aligns with organizational needs, security standards, and operational efficiency.

However, many growing organizations might not have a CIO. Whether you're a CIO yourself or putting on the CIO hat, here are the questions you want to make sure you ask of your potential AI-powered SRM platform vendor.

1. How is the AI trained?

Data sources and quality

Inquire about the data sources used to train the AI models. Are the data sets relevant to the specific use cases within your industry? Understanding the quality and diversity of training data helps ensure the AI provides accurate and relevant responses.

Supervised vs. unsupervised learning

It's essential to know whether the AI is trained using supervised learning (with labeled data and human input) or unsupervised learning (where it learns patterns independently). Knowing this helps gauge how well the AI will understand and respond to context-specific queries.

Continuous learning and updates

Ask if the AI model is continuously updated with new data to keep it relevant as market trends, business needs, and language evolve. Regular updates are crucial for maintaining accuracy and adapting to changes.

2. How is accuracy ensured?

Validation and testing processes

Understanding how the AI's accuracy is validated and tested is important. What methods are used to check the model's performance, and how often are these checks conducted? CIOs should look for platforms that use rigorous testing frameworks and maintain high accuracy standards.

Feedback mechanisms

Ask if there are built-in feedback loops that allow users to flag inaccuracies or suggest improvements. User feedback is vital for refining AI models and improving response quality.

3. Are there litigation risks?

Compliance with regulations

Verify if the SRM platform adheres to industry-specific regulations (e.g., GDPR, HIPAA, CCPA). Non-compliance can lead to legal liabilities and fines.

Accountability and liability

Understanding who is accountable if the AI generates inaccurate or misleading information is crucial. Ask about liability clauses in the vendor agreement and whether the platform offers any indemnity against errors.

Audit trails and documentation

Ensuring that the SRM platform provides robust audit trails and documentation for AI-generated content can help in compliance audits.

4. How does an AI-led SRM platform fit into our tech stack?

Integration with existing systems

Assess how well the SRM platform integrates with the company's current tech stack, including your CRM, ERP, content management systems, and communication tools like Slack or Microsoft Teams.

Scalability and flexibility

It's essential to understand if the platform can scale with organizational growth and adapt to new technologies or changes in existing systems. Confirm that the SRM platform offers robust APIs for integrating with other business applications.

Data synchronization

Understanding how data synchronization works across different systems and ensuring real-time data exchange can prevent inconsistencies and improve operational efficiency.

Workflow compatibility

Ensure the SRM platform aligns with existing workflows and does not disrupt established processes. The goal should be seamless integration that enhances productivity rather than adding complexity.

5. How will you implement AI across your organization?

Implementation timeline

Inquire about the typical time required to deploy the SRM platform, including setup, customization, and user training. A clear implementation timeline helps in planning and resource allocation.

Support during implementation

Asking about the level of vendor support during the implementation phase is crucial. This includes technical support, training programs, and onboarding resources to ensure a smooth rollout.

User adoption

Consider how intuitive the platform is for end-users. Ease of use directly impacts user adoption rates, so platforms with user-friendly interfaces and clear documentation are preferable.

6. Is proprietary data private?

Data ownership

Clarify who owns the data processed by the SRM platform. Ensuring that your organization retains full ownership of its data is crucial for privacy and control.

Data encryption

It's essential to know what encryption standards are used for data at rest and in transit. High levels of encryption help protect sensitive information from unauthorized access.

Data access controls

Ask about access controls and how the platform ensures that only authorized users can access proprietary data. Role-based access and multi-factor authentication are key features to look for.

7. Are you protecting competition-sensitive and personally identifiable data?

Data masking and anonymization

The platform should offer data masking and anonymization features to protect competition-sensitive information and PII, especially when using shared environments or generating reports.

Compliance with privacy laws

Ensuring that the platform complies with privacy laws and regulations that protect PII is essential to avoid legal penalties and maintain customer trust.

Incident response plans

CIOs should confirm that the vendor has a comprehensive incident response plan to address data breaches or leaks involving sensitive information.

8. Have you taken steps to avoid copyright infringement?

Content licensing

Ask how the SRM platform handles content licensing and whether it uses third-party data sources that might be subject to copyright restrictions. It's essential to ensure that all content used by the AI is legally licensed.

Content creation guidelines

Understanding the platform's guidelines for content creation can help prevent copyright infringement. CIOs should look for AI that generates original content and does not simply copy from existing sources without attribution.



A pressing mandate

Winning business has never been harder. Organizations are constantly looking for ways to operate more efficiently, so the stakes of making the right purchase and choosing the right partner are high. Buyers are applying greater scrutiny to every request, whether it's through formal questionnaires like RFPs or casual inquiries via email or phone. This trend is not just growing — it's intensifying.

Bid and proposal teams bear the brunt of this pressure. These vital and largely under-resourced teams are being asked to handle a greater volume of requests that are rising in complexity, with a greater chunk of company revenue on the line every year. Without immediate change, organizations will struggle to keep up, risking missed opportunities and revenue loss.

AI-powered Strategic Response Management (SRM) is the solution. The right AI-powered SRM platform is a powerful catalyst for bid and proposal teams, empowering them to produce more impactful responses faster and to operate as true strategic

partners to the business. Companies that have already adopted AI-driven SRM are already seeing tangible results: faster growth, improved win rates, enhanced collaboration, and reduced costs.

Selecting the right SRM platform is essential to realizing these benefits. Organizations must focus on tools that go beyond GenAI functionality and seamlessly integrate with existing systems, democratize knowledge, and offer scalable automation to keep pace with evolving buyer expectations. Continuous advancements will make these platforms smarter, faster, and more efficient. When businesses embrace AI, they will continue to access new advantages, gain deeper insights, and improve employee and customer experiences. Those who hesitate risk falling behind.

AI-powered SRM is not just changing how businesses respond — it's reshaping how they operate, unlocking the speed, accuracy, and agility necessary to thrive. The time to act is now.



The AI Handbook for Strategic Response Management

How to work smarter & win more

Brought to you by  **responsive**

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 worldwide 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.

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