

MKTG 3

Pitch & Proposal Best Practices: How to Optimize Your Process

Comparisons of Currently Available Pitch Automation Tools



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Criteria	CP Proposal Pilot™	PMAPS Legal	Hubbard One Proposal Generator	PitchBook Builder	RFPMonkey.com™	Enterprise Management Suite for Proposals™	Proposal Automation Suite/RFP Machine	Sant Suite 8 ProposalMaster® and RFPMaster®	Saturno WebProposal
Company	Content Pilot	Proposal Software	Hubbard One	ICVM Group	RFPMoney.com™ LLC	Octant	Kadient/Pragmatech	Santcorp	Saturno Design
Integrated with content management system? Web site?	Web site content integration.	Can integrate with CMS	Yes	Yes. CMS was designed to produce content for both the web site and PitchBook Builder.	No	Integrates with many other systems, including Documentum, GoldMine, SalesLogix, Siebel, SAP, DB2, Microsoft Outlook, Word, Excel; Microsoft CRM, Oracle	No	Yes	Yes
Compatible with/exportable to word processing programs?	Microsoft Word (and PDF generation).	Tightly integrated with Microsoft Word	Microsoft Word, with Microsoft PowerPoint available in 2010	Yes	Retrieval/display is HTML through the web. Copy/Paste is the method used to include retrieved contents into Word.	Yes	Tightly integrated with Microsoft Word.	Content is selected and built into a cohesive document in Microsoft Word for proposals, and in Word and Excel for RFPs.	Yes
Focused on legal industry?	Yes	Yes; product is tailored law firm solution	Yes	Yes	No	No	No	No	No
Centralized or decentralized solution?	Both (proposal product can be purchased separately from other content management products in the suite)	Works for both	Both	Can be set up either way	Can be both	Both	Works for both	Unknown	Both
Web based?	Yes	An optional web-based read-only portal is available	Yes. Password-protected access.	Yes	Yes	Yes - Microsoft IE 6 or later; Netscape 7.1 or later.	An option	Yes	Yes, with secure login
Reporting tools?	Win/Loss Tracking, debrief notes feature, dashboard status view (with task list)	Yes – comes with customizable reporting and tracking tools, including 25 pre-built reports to start	Robust search builder provides graphical and textual reporting for proposals and opportunities, including user defined fields. Searches can be saved by user for re-use.	Yes	Yes	Yes. Provides views of sales and proposal pipelines	Yes, comes with a customizable tracking database module.	Yes, customizable	Unknown
Customizable templates?	No limit to the number that can be designed by vendor.	Yes	Yes. "No limits to proposal customization or design."	Yes – customized style sheets to match existing brand.	No. RFPMonkey.com focuses on storing, categorizing, and retrieving Question & Answer pairs for reuse, not producing response documents or new RFP templates.	Unknown	Yes	Yes	Unknown
Customizable database?	Yes – vendor customizes to user needs.	Yes	Yes. Fields can be added to database, capture, search and detailed screens by non-technical users.	Yes	Standard database structure with customizable categorization values (category, sub-category, product, version, division).	Unknown	Yes – you have control over the directory structure and keywords.	Yes	Unknown
Content integration with other systems (HR, finance)?	CRM, Time and Billing, and other SQL database applications.	PMAPS offers built-in integration with LexisNexis InterAction CRM	Integrates with all Hubbard One products including Web Sites, Contact Manager, Experience Manager and other applications.	Yes – the CMS draws information from HR, InterAction and other systems.	No	Yes – Create, write and manage proposals, coordinate resources across multiple departments.	Not without custom programming.	Unknown	Connects to CRM and Contact Management databases
Keyword searchable?	Yes	Yes – all content is full-text searchable (no need to assign key words)	Yes	Yes. Can also save templates based on pitch or users.	Yes. Also full text search.	Unknown	Yes	Unknown	Unknown



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Document automation available?	Yes	Yes	Yes; can allow selective access to pre-approved materials.	Yes – can output to word processing document or electronically (viewable by the client through the web browser)	Print option is available that quickly outputs all approved entries to a formatted Word document but does not include “finishing” items such as a cover page.	Unknown	Yes – “Blueprints” and “SmartDocs”	Yes	Yes
Compatible with document management systems?	Ability to integrate directly with any firm DMS.	Yes	Not directly, but from within Microsoft Word.	Yes	No	Integrates with Microsoft Share-Point and other document management systems.	Yes	Assumed to be compatible since output is in Word.	Connects to eContent Management databases
Cost (or pricing model)	Annual license fee and one-time customization and development fee.	Flexible – both per-seat and enterprise-wide license options. An import of any existing proposal software application is included.	Either traditional licensing model or subscription.	Varies on how many CMS areas are leveraged as well as the complexity of the output style. From \$20K one-time build.	Varies by account level and subscription term. Fees are calculated quarterly, with discounts for extended terms. For example, a 2-year term can cost as little as \$2,323.20 or as much as \$21,331.20. Additional services are available for additional fees. Further discounts available through referral program.	Unknown – will differ based on the needs of the organization.	User license plus annual maintenance fees. Site license for web-based application.	Unknown	Unknown
User-friendly, intuitive interface?	Simple, web-based interfaces.	Database GUI is layered on Microsoft Word	Web-based interface with optional Word plug-in	Yes	Web-based interface	User-friendly views of sales and proposal pipelines.	Based on Microsoft Word interface, but database interface requires extensive training to learn.	Yes	“Looks and works just like the word processing software you already use every day.”
Customer Support Levels?	support@contentpilot.net	Account execs, user conferences, training	Support coverage during U.S. business hours.	Support through vendor project team.	Online help content and instructor-lead training available	Telephone and e-mail, plus online knowledge base for common technical problems and a ticket system to open service requests.	Account Execs, ListServ, user conferences, training courses (online and in-person) for all products.	Customer Support phone numbers for US and Europe; online documentation, tutorials and web orientations	Unknown
Number of personnel	<10	Unknown	>200	14	Not disclosed. Small company.	Unknown	Unknown	35	Unknown
Headquarters / Locations	Based in Texas	Westport, CT	Chicago, Boston, Eagan, New York, London	Mattituck, NY	Marietta, GA	Sterling, VA	Lowell, MA	Cincinnati, OH	Portland, OR
URL	www.contentpilot.net	www.proposalsoftware.com	www.hubbardone.com	www.icvmgroup.com	www.rfpmonkey.com	www.octantsoftware.com	www.kadient.com	www.santcorp.com	www.saturnodesign.com
Notes / Other	All products are focused on the legal industry. Proposal Pilot includes a flexible deals and cases tool. Company also offers other “pilot” products to handle brochures, blogs, newsletters, extranet, intranet, alumni and web applications.	Company is focused on proposal technology. PMAFS stands for Proposal Management And Production System.	A Thomson Reuters subsidiary. An additional Content Globalization module enables proposal generation in a variety of languages.	ICVM Group is a full-service web design, development and hosting firm. We offer strategic creative services such as brand and corporate identity development in addition to our deep expertise in the design and construction of websites, web-based applications and content management systems.	Interesting feature that allows users to rate content (excellent, good, average and bad). User permissions can be set to facilitate approvals and assignment workflow.	Purchase through an “integration partner.” <i>Information provided here is from vendor materials and has not been verified for accuracy.</i>	Pragmatech is Kadient’s proposal automation product line/brand. The RFP Machine® enables knowledge managers to build, edit, and maintain a central repository of company, product, and service information required for automated RFP and RFI response documents. The Proposal Automation Suite™ adds document automation features.	Suite of products includes ProposalMaster®, RFPMaster®, PresentationBuilder® and ProSearch®. <i>Information provided here is from vendor materials and has not been verified for accuracy.</i>	General concept is to publish proposals online and have recipient view or output to their word processor “with just one click.” <i>Information provided here is from vendor materials and has not been verified for accuracy.</i>

