WHERE TO START WITH AI · NO. 7

Responding to RFPs

An RFP response assistant, rolled out in two stages: it drafts a sourced first pass, then, on its own, completes the authorized standard sections. Commitments stay with people.

Stage 1 · the sales engineer decides, with AI support

Stage 2 · AI completes authorized sections, people commit

Illustrative case: fictitious company; all figures are approximate.

WHY START HERE

It meets all four tests of a good first workflow

High volume

Several bids a month, with largely recurring questions.

Clear owner

Sales leadership, which already runs the bid process.

Clear output

A sourced first draft, question by question.

Known pain point

For sales as well as the experts they pull in.

Answers already written. The assistant draws on past proposals, product data sheets, and customer references the company already has. The risk does not go away. It becomes more visible, measurable, and manageable once the sources, the scope, and the escalation thresholds are defined.

Illustrative case: fictitious company; all figures are approximate.

ON ONE CONDITION

Low risk, but only within a strict scope

1. **An approved answer library**
   kept current, with an owner for each answer.

2. **Current internal sources**
   data sheets, certificates, approved references.

3. **No commercial commitment**
   left to AI: pricing, timelines, warranties, signature.

4. **Unusual, sensitive, or ambiguous bids**
   routed to the sales engineer.

> Outside this scope, it becomes a different use case with a different risk profile.

THE WORKFLOW AS IT RUNS TODAY

Six steps, all done by hand

Example Equipment Inc. · 900 employees · fictitious company

1	**RFP package received** specifications, appendices	
2	**Requirements reviewed** criteria, deadlines, required documents	● Requirements scattered across appendices
3	**Past proposals searched** in shared folders	● Right version hard to find
4	**Sections drafted one by one** company, technical, references	● Same text rewritten for every bid
5	**Expert input gathered** engineering, quality, legal	● Last-minute follow-ups
6	**Pricing, review, signature** by an authorized signatory	● Little time left for pricing

≈ 8
bids a month (illustrative)

≈ 60%
of questions already answered (illustrative)

≈ 6 days
of work per bid (illustrative)

● friction point · illustrative figures

Illustrative case: fictitious company; all figures are approximate.

BEFORE YOU START

Build the answer library

The work starts by building an answer library: approved text, current product data sheets, valid certificates, and customer references cleared for use. Each answer has an owner and an expiration date. The tool comes after.

1
Approved answers

2
Current data sheets and certificates

3
One owner per answer

4
An expiration date

> **The tool comes after.**

Illustrative case: fictitious company; all figures are approximate.

STAGE 1 · HUMAN IN THE LOOP

The assistant drafts the first pass, the sales engineer decides

The RFP comes in
through the same channel as today.

↓

The assistant drafts a first pass
question by question, citing the source.

↓

The sales engineer decides
completes, corrects, and prices.

↓

Every correction is logged
section by section.

What this stage produces: a section-by-section measure of how accurate the proposed answers are.

Estimated duration: 2 to 3 months.

Illustrative case: fictitious company; all figures are approximate.



STAGE 2 · AUTHORIZED STANDARD SECTIONS

It completes authorized sections; the sales engineer owns the commitment

THE ASSISTANT COMPLETES WHEN

- The question matches an approved answer
- The source is current and cleared for use
- The section involves no pricing, timeline, or commitment

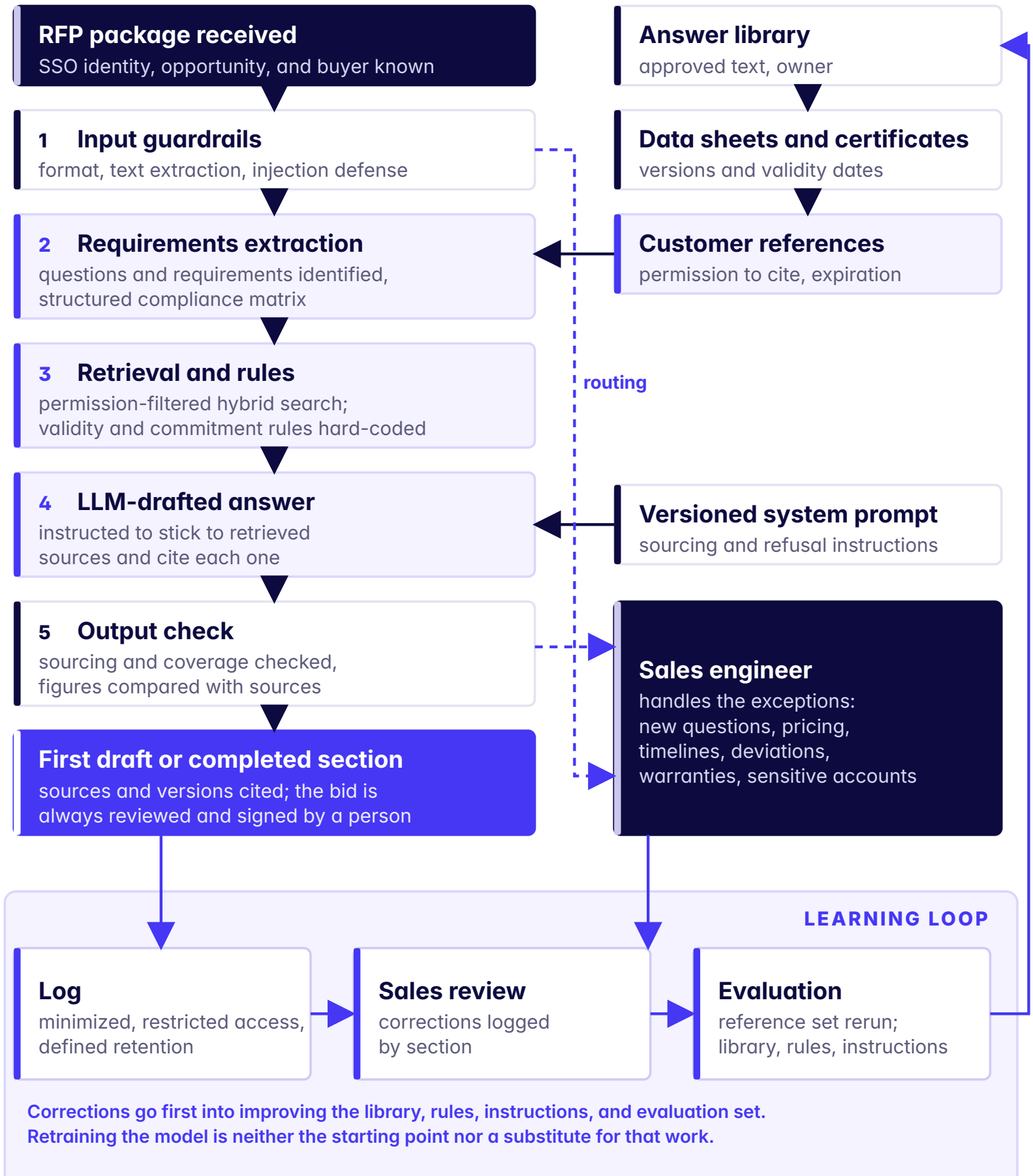
IT ROUTES TO THE SALES ENGINEER WHEN

- The question is new or ambiguous
- No approved, current source covers it
- The section involves pricing, timelines, warranties, a deviation from the specifications, or similar

> Every week, the sales team reviews a sample of completed sections and keeps the library up to date.

UNDER THE HOOD · EXTRACTION, RETRIEVAL, LLM

Reference architecture: how the system stays under control



Illustrative case: fictitious company; all figures are approximate.

UNDER THE HOOD · CONTROLS AND SECURITY

The controls required before any autonomous answer

1 **Evaluation**
A reference set of about 40 past bids, pseudonymized or minimized, with the final answers annotated by sales engineers. Metrics: answer accuracy and sourcing, unsourced claims, requirement coverage, and the rate at which exceptions are correctly routed. Rerun whenever the model, the library, or the instructions change.

2 **Observability**
Every run is logged: requirements extracted, IDs of cited sources, routing decision. Buyer data, pricing, and résumés: log minimized, access restricted, retention defined by purpose and applicable obligations.

3 **Identity and access**
SSO (SAML or OIDC). Permissions apply at retrieval: pricing, margins, and résumés visible by role. Only an answer's owner can change it. Signing authority stays with authorized signatories.

4 **Data**
Hosting and data transfers verified for the chosen solution; contractual terms barring use of the data for model training; encryption; buyer confidentiality and RFP rules taken into account; documented Swiss FADP assessment.

5 **Application security**
Safeguards against prompt injection, including in the buyer's documents. Permitted outcomes: draft a sourced first pass, complete an authorized standard section, or route to a person. Submission and signature stay with people.

> Three options: the module in your existing sales tool, a proposal management platform, or a custom build (extraction, retrieval, model API). The choice comes after the library audit, not before.

Illustrative case: fictitious company; all figures are approximate.

MOVING FROM STAGE 1 TO STAGE 2

A decision based on evidence, one section at a time

The move to stage 2 should not be decided in advance. It depends on what the sales team observes during stage 1: the accuracy of the proposed answers, the corrections needed, and the system's ability to recognize questions that fall outside its scope.

WHAT THE TEAM OBSERVES

- Accuracy and sourcing of proposed answers
- Corrections needed, by section
- Exceptions correctly routed
- No significant incident observed within the tested scope
- A current library, each answer with an owner

> The company overview and certifications could move to stage 2, while technical answers stay in stage 1.

Illustrative case: fictitious company; all figures are approximate.

THE GOAL, AND HOW TO MEASURE IT

The goal is not to take bid responses away from the sales team. It is to cut the time spent finding and rewriting the same text, get a complete first draft sooner, and free up sales engineers' time for the solution, the pricing, and the commitment.

Time from receipt of the RFP to a complete first draft

≈ 6 days → **≈ 3 days**

today (illustrative) — illustrative stage 2 target

Also tracked: the share of standard sections reused without rewriting, **50–60%** (illustrative target)

Data protection	Swiss FADP: purposes, data processed (résumés, contacts), confidentiality of RFP documents, hosting, and transfers clarified before launch.
Governance	The head of sales owns the outcome and reviews a sample of completed sections every week.

Illustrative case: fictitious company; all figures are approximate.

In this example, AI does not take bid responses away from the sales team.

It steps in first where an approved answer and a current source are enough to write the response.

So the useful question is not “Which tool should we buy?” It is **“Which repetitive work can we have AI assist with, measure, and then delegate under clear controls?”**

> **What repetitive work in your company already meets these conditions?**

Sergio Castagna Consulting.
sergiocastagna.com · info@sergiocastagna.com · Geneva

Sergio Castagna Consulting is a member of the OpenAI Partner Network and a registered partner in the Google Cloud Partner Network. The tool comes after the problem is defined.