

Case Study

GenAI Development Services Help an IT Services Company to Bring Down Proposal Generation Time by 70%



Customer Overview

Customer

A global Managed IT Services provider

Profile

The client delivers comprehensive IT management and consultancy services to organizations worldwide

Industry

IT Services

Services

Generative AI

Business Need

In the competitive landscape of business development, crafting compelling proposals, including Statements of Work (SOWs), Request for Proposal (RFP) responses, and Managed Service Agreements (MSAs), is a crucial element for success. To address the challenges associated with proposal creation, the Managed Services client was looking to create a cutting-edge Customer Proposal Builder leveraging Generative AI (GenAI).

Through this innovative solution, the client aimed to streamline the proposal generation process and enhance the efficiency and accuracy of content for Client Advisors and Business Development Managers (BDMs).

Solution and Approach

Synoptek began the engagement by creating an MVP, demonstrating it to stakeholders, validating the results, and creating an integrated solution within the CRM platform. In the development of this solution, 2 major steps were involved: the creation of embeddings and prompt development using LLMs.

Cybersecurity

OpenAI's GPT-3.5+ architecture for natural language understanding and generation

Cloud Services

Azure Machine Learning for model training and deployment

Azure Cognitive Services for additional AI capabilities

APIs

Custom APIs and connectors to seamlessly integrate GenAI with the existing proposal creation workflow

- To develop the GenAI-enabled proposal builder MVP, we designed the UI using Streamlit and Azure web applications.
- To facilitate intelligent content generation, Large Language Models were employed to create embeddings for different proposal types.
- These embeddings capture the essence and structure of successful proposals, allowing the GenAI model to understand and replicate effective language patterns.
- The solution was built on the robust Azure tech stack, incorporating cloud services such as Azure Machine Learning and Azure Cognitive Services.
- OpenAI's advanced language models were seamlessly integrated, enabling the generation of high-quality, contextually relevant content.
- We undertook a weekly cadence of status updates on project progress and conducted ad-hoc meetings to deliver demos, address issues, etc.
- Post development, we provided the necessary training to stakeholders with technical documentation to enable a seamless experience of the platform.
- We also provided application support for 30 days to resolve bugs and address user concerns.

Future iterations of the solution will focus on enhancing the customization capabilities of the GenAI. These will allow users to tailor proposals with greater precision based on client nuances, industry specifics, and project requirements. There is also a possibility of implementing a user feedback loop to enable continuous improvement. Insights from Client Advisors and BDMs will inform ongoing refinements to GenAI algorithms, ensuring the solution evolves to meet the dynamic needs of proposal creation.

Business Benefits

The Customer Proposal Builder using GenAI has revolutionized the way the Managed Services company approaches proposal generation. By leveraging advanced language models, a robust tech stack, and an innovative approach, the client can save time in proposal building while also elevating the quality and consistency of proposals.

The GenAI-enabled Customer Proposal Builder enables the Managed Services client to enjoy several benefits:

- Client Advisors and BDMs experience a remarkable 70% reduction in the time required to draft, edit, and refine proposals.
- The automated content generation significantly accelerates the proposal creation process while resulting in the creation of more professional and polished proposals.
- The GenAI-driven Proposal Builder ensures consistency and accuracy in language usage, minimizing errors and mitigating the need for extensive proofreading.
- Since a large percentage of proposal content is automatically generated by GenAI, it allows teams to focus on strategy, customization, and client-specific elements rather than repetitive tasks.

As we look to the future, the integration with CRM applications and ongoing customization enhancements promise to further optimize the proposal creation process, driving greater efficiency and effectiveness in the client's business development efforts.

About Synoptek

Synoptek delivers accelerated business results through advisory-led, transformative full-life-cycle systems integration and managed services. We partner with organizations worldwide to help them navigate the ever-changing business and technology landscape, build solid foundations for their business, and achieve their business goals.