APMP 2023
Western Region Conference

Microsoft Copilot and AI and Implications for Proposal Development

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Amy McGeady, Shipley Associates

October 2023

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About the speakers

Amy McGeady, PhD, CPP APMP Fellow

- Senior Vice President of Strategic Services, Shipley Associates
- Board Member, APMP International Board (2023-2024)

Marty Humm, CF APMP

- Full time contractor with Microsoft's Proposal Center of Excellence (PCoE) since 2020
- Shipley Vice President of Innovation (2023)

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Disclaimer: we do not represent Microsoft or hold any inside information about Microsoft products, product features, or release dates.

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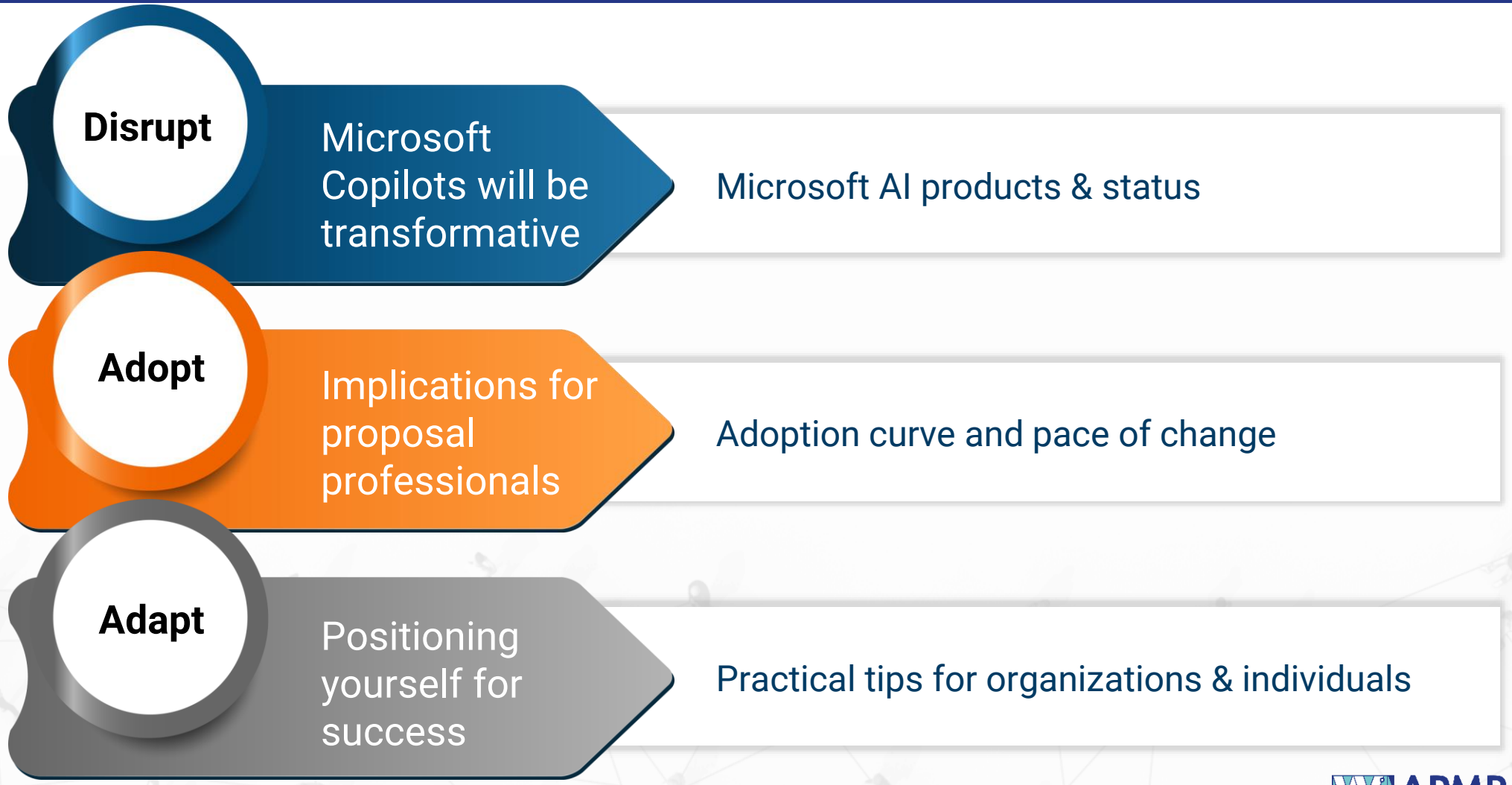
Our conversation today



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Microsoft 365 Copilots

Disrupt

- New era of software innovation, widely accessible
  - Reimagine
  - Simplify
  - Optimize
- Some of the powerful things Copilots can do:
  - Edit an open document
  - Summarize and synthesize information
  - Analyze and generate insights
  - Brings together data from across Microsoft 365, e.g., calendars, emails, chats, document

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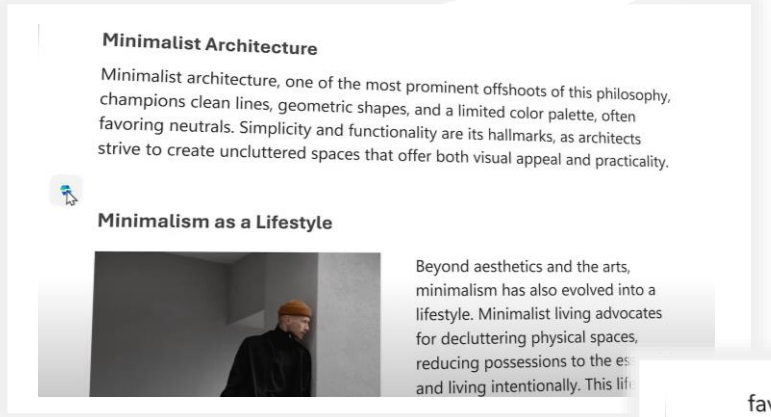
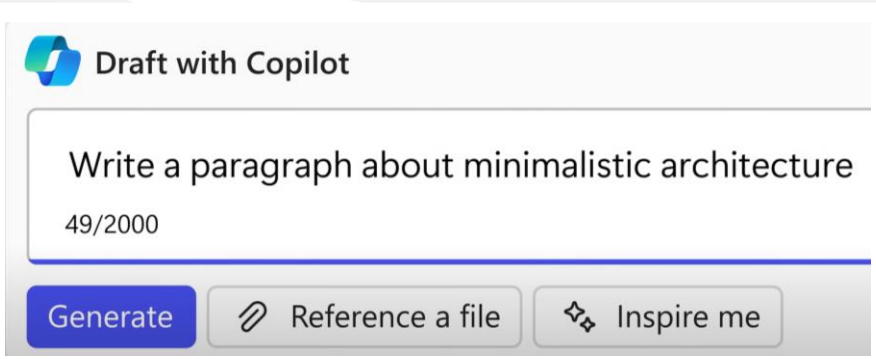
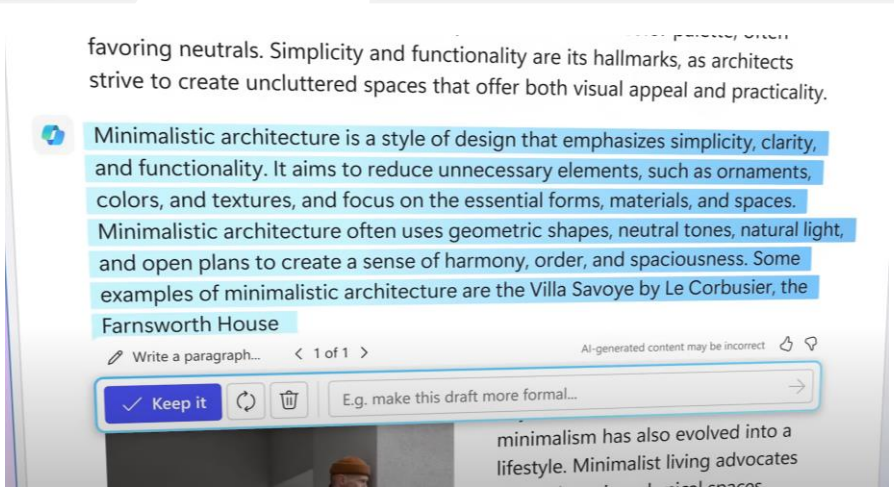
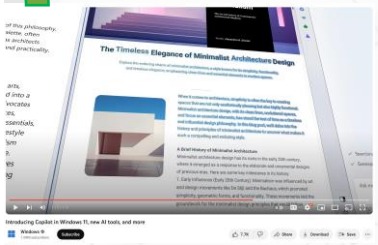
Microsoft 365 Copilot in Word

Copilot









Watch video later

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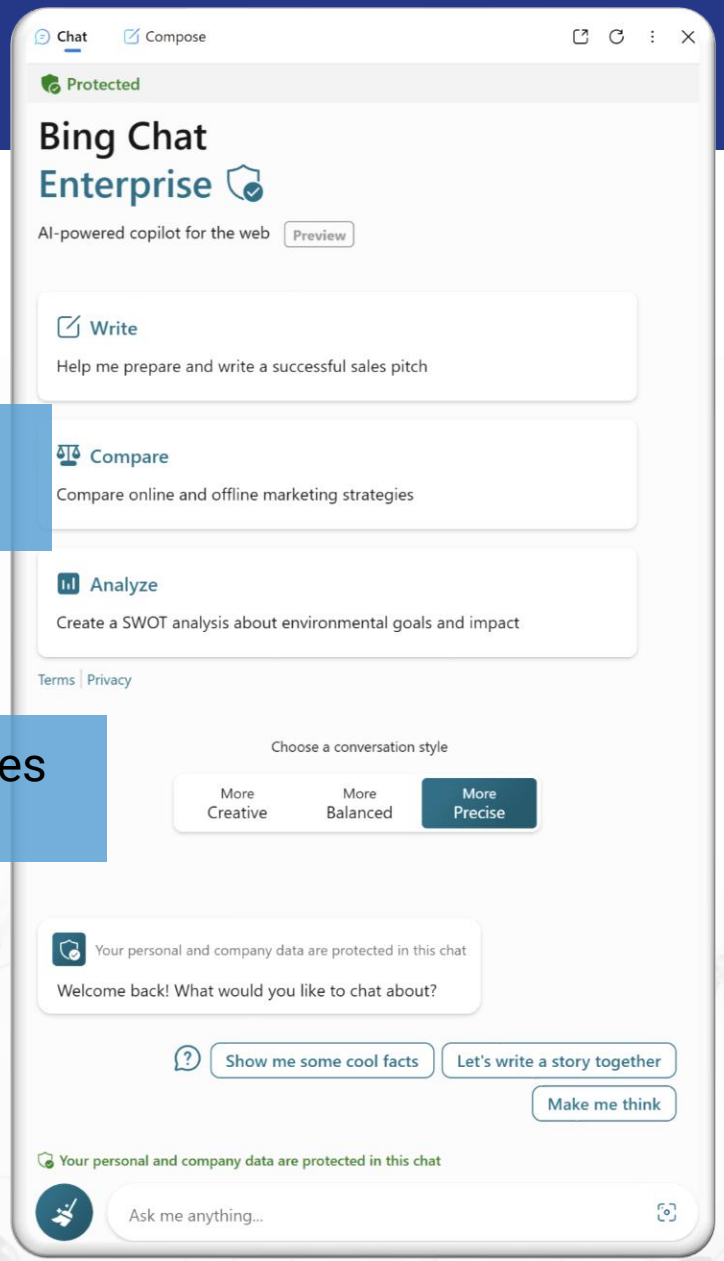
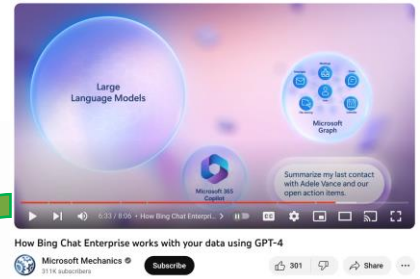
Bing Chat Enterprise

Disrupt

AI-powered web chat with search

Combines generative AI capabilities of Bing Chat with data protection





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Unveiled in 2023

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May-June

February

Bing Chat available in public preview

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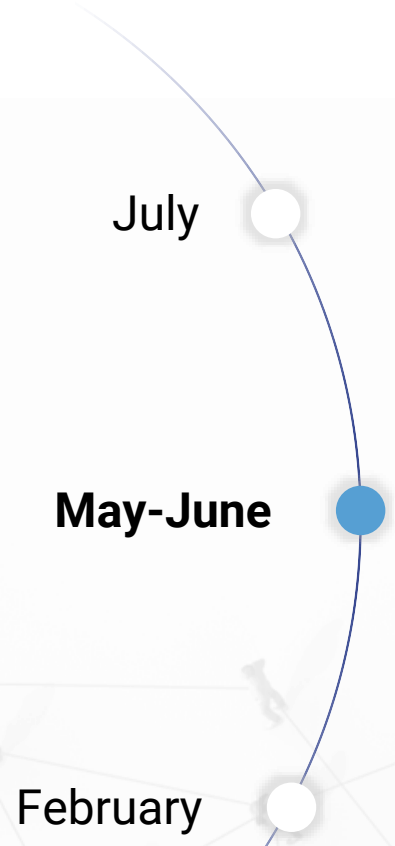

Microsoft Copilots in early access program

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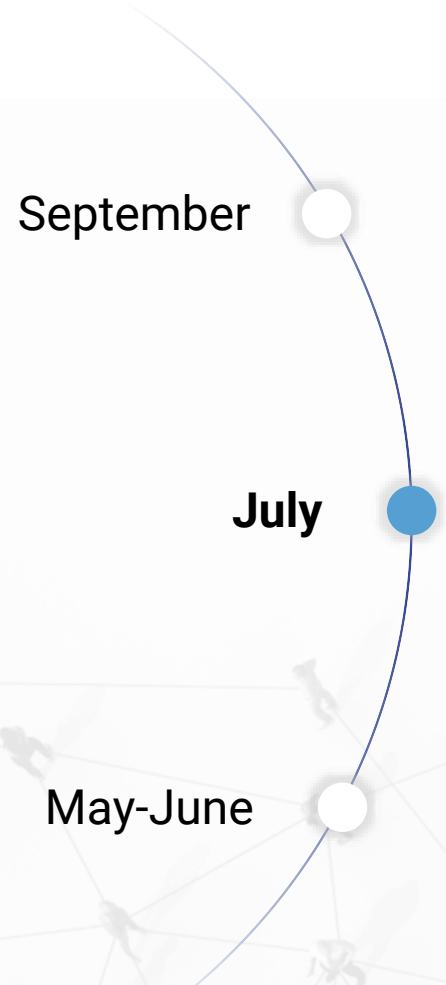

Bing Chat Enterprise available in public preview

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September-November

September — Microsoft Copilot Copyright Commitment announced

July

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September-November

Microsoft 365 Copilot, Windows Copilot, and Teams Copilot release

September

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A Few More Details

Disrupt

SOLUTION AREA	COPILOT
Modern Work	• **Microsoft 365 Copilot** | Preview • **Bing Chat Enterprise** | Nov. 1 for Enterprise customers • **Windows Copilot** | Beginning Sept. 26
Business Applications	• Copilot in Power Apps | Preview • Copilot in Powe Automate | Preview • Copilot in Power Virtual Agents | Available • Copilot in Power Pages | Preview • **Microsoft Sales Copilot** | Preview • Copilot in Dynamics 365 Field Service | Preview • Copilot in Dynamics 365 Customer Insights | Preview • Copilot in Dynamics 365 Business Central | Preview • Copilot in Dynamics 365 Supply Chain Center | Available

SOLUTION AREA	COPILOT
Digital & App Innovation	• GitHub Copilot | Available • GitHub Copilot X | Preview
Data & AI	• Copilot stack with Azure AI | Available • Copilot in Power BI | Preview • Copilot in Microsoft Fabric | Preview
Security	• Security Copilot | Preview

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Accelerating Proposals with Bing Chat Enterprise

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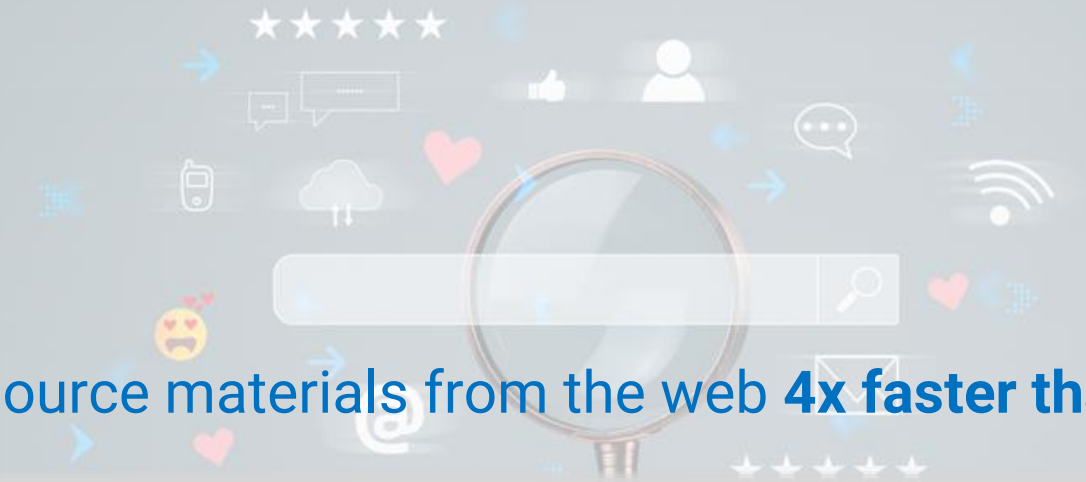

RESEARCH

Gather and assess source materials from the web **4x faster than web browsing.**

Generate 5 possible hot buttons of my customer based on news articles, press releases, industry blogs, etc. Summarize rationale and how we might address them with our solution.

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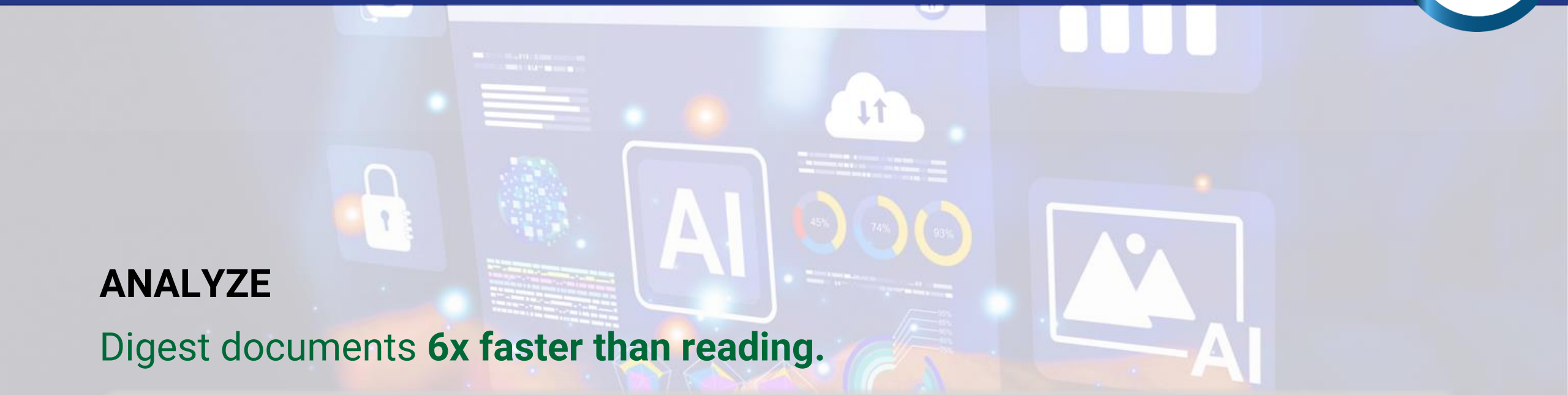

ANALYZE

Digest documents **6x faster than reading.**

Read my RFP and generate a timeline of all procurement dates it references, identifying possible mistakes and discrepancies in the RFP.

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Accelerating Proposals with Bing Chat Enterprise

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PLANNING

Develop outlines, schedules, storyboards, and other plans **10x faster than working them out manually.**

Based on the RFP sections M and L, create an outline that optimizes ease of evaluation and compliance with instructions.

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DRAFTING

Useful content with minimal editing and massaging. **8-16x acceleration drafting excellent content.**

Create a short answer response to this technical feature question with citations to full documentation on the web.

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Accelerating Proposals with Bing Chat Enterprise

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EVALUATING

Fast scoring and qualitative feedback on proposal drafts. **2x faster individual reviewing or like having 20% more Red Team reviewers.**

Based on the RFP's evaluation criteria, how does this section currently score as written, and what improvements do you recommend?

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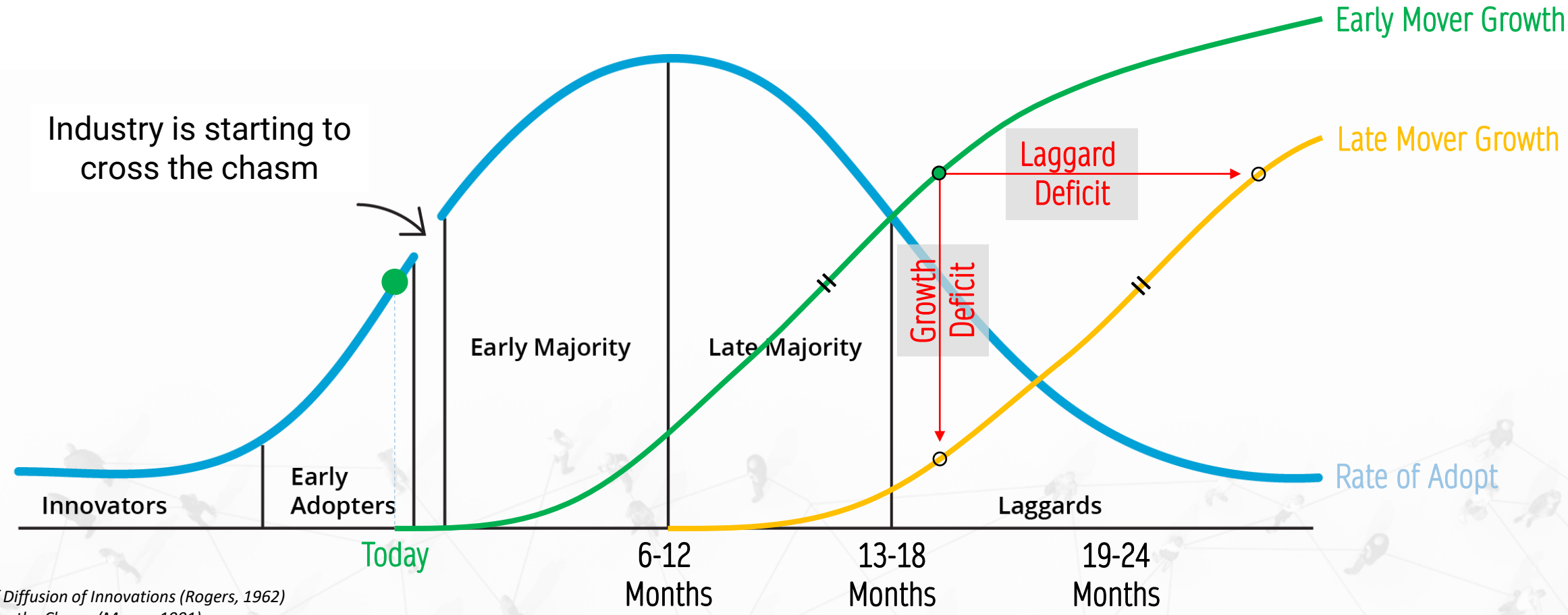
Where are we now?

Adopt



Law of Diffusion of Innovations (Rogers, 1962)
Crossing the Chasm (Moore, 1991)
Rewired (McKinsey, 2023)

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How BD with AI may progress

Adopt

2023-2024

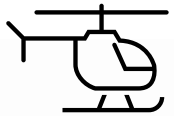
AI widely acknowledged as a transformative force for BD

2025-2026

AI-pioneering professionals and organizations lead industry

2027-2028

Roles/specializations evolve drastically to reflect reinvented BD process



2029+

Optimal division of labor between humans and AI reaches maturity

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Navigating the future of BD with Shipley BD.ai

Adapt

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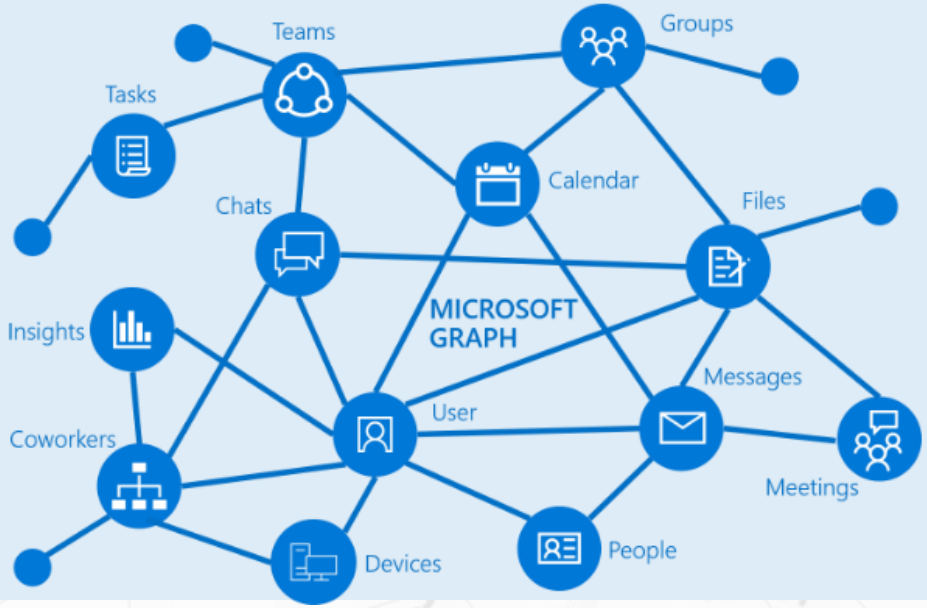
Organizations: prepare for BD.ai by preparing for Copilot.

Adapt

Microsoft Graph connects your productivity tools

Copilot utilizes this graph to provide optimal assistance

Using tools as intended such as chats vs. email enhances AI effectiveness.



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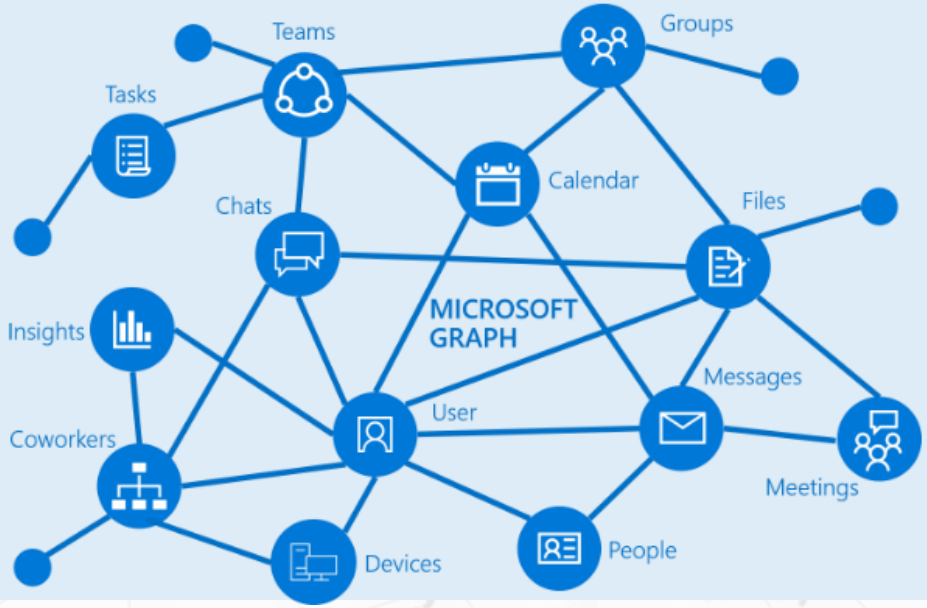

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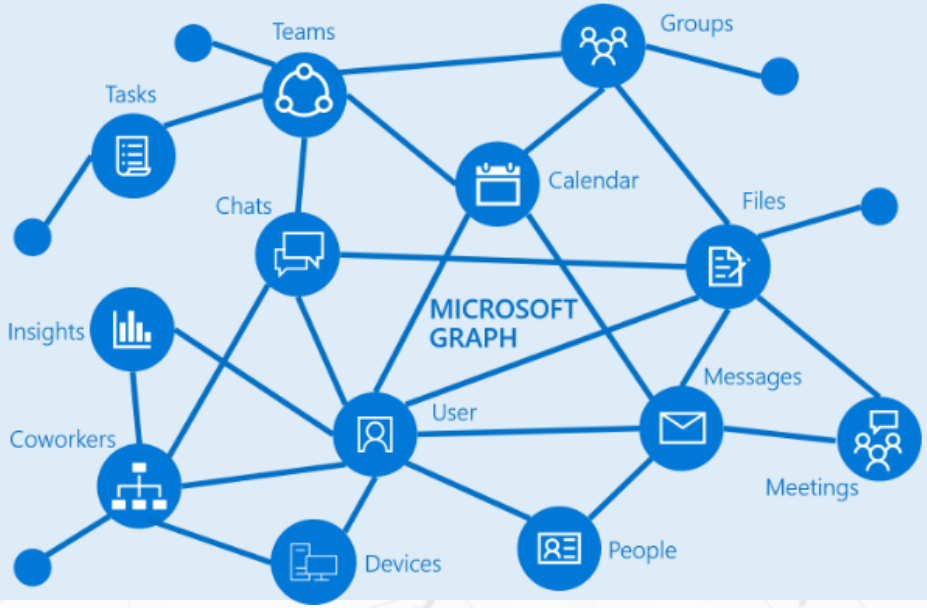

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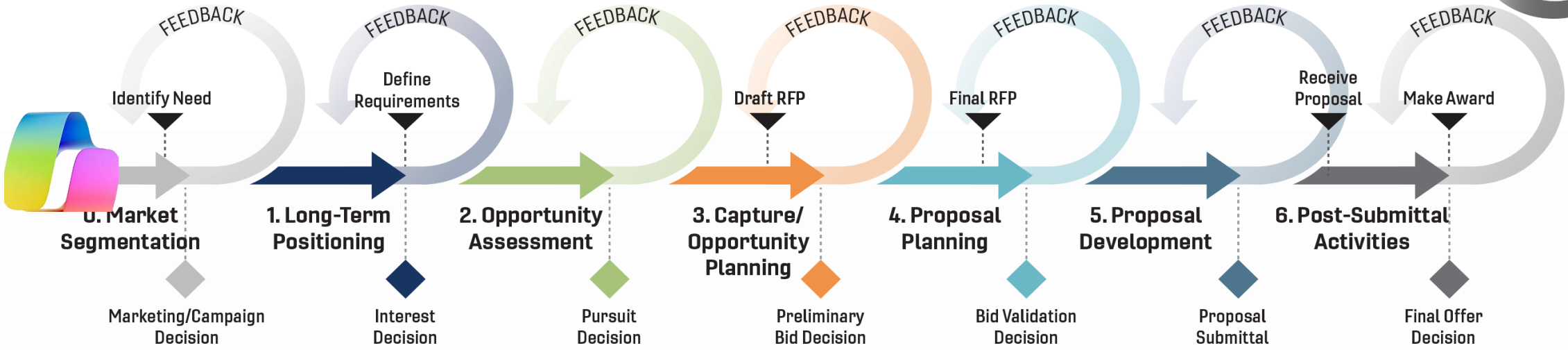
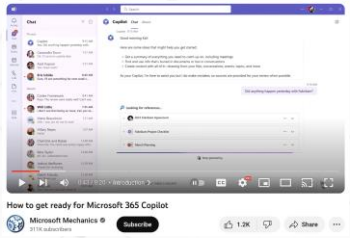


BD.ai accelerates and links BD phases with AI techniques

Watch video later



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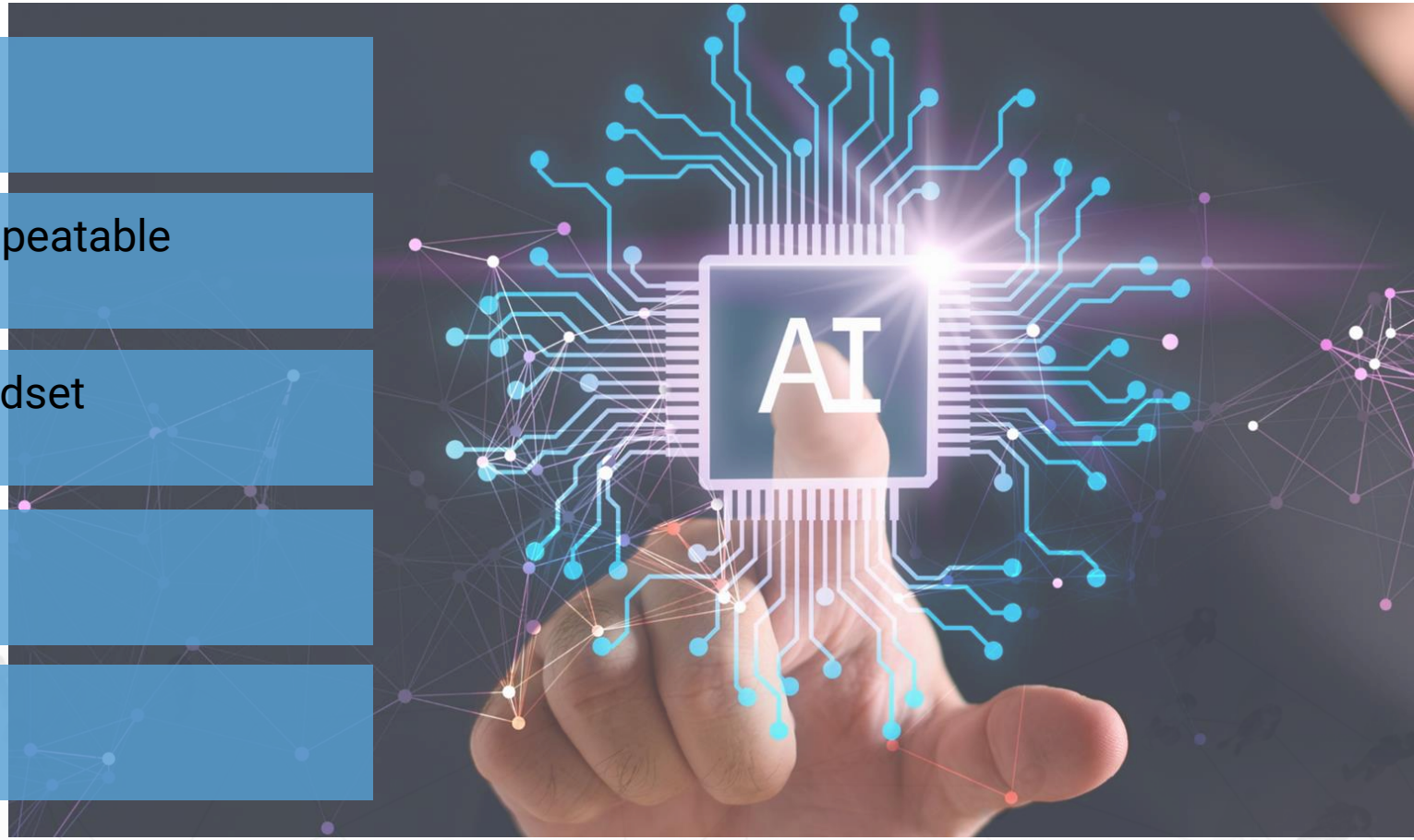
Professionals: 5 things to do this year…

Adapt

1. Stay current on AI news
2. Try AI in a proposal and develop a repeatable technique for future proposals
3. Practice the new conversational mindset with AI
4. Change an IT bad habit you have
5. Hone your uniquely human skills



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Conclusion

2023 has shown AI is here and will likely change our lives.

Strategically, there is still time to truly catch the first wave and beat laggard competitors.

The future is unwritten—don't underestimate your individual voice in how AI unfolds.

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