The SMA Way and the Future of Proposal AI

Steven Aberle and Jacque Keats

ROHIRRIM ◎ The Program Lifecycle Company™

DO MORE TOGETHER

Steven Aberle

o Applied AI Engineer, NLP Researcher & Solutions Architect

o Founder, CEO of Rohirrim. The first organization - specific generative AI solution for enterprises

o Generative AI patents for proposal management, procurement and acquisition

o 18 years experience with complex technical architectures for commercial, aerospace, defense, and intelligence organizations

Jacque Keats

o Software Engineer with 30+ years of experience

o SMA Chief Operating Officer

o Developed and took to market 5 commercial enterprise software solutions

o Developed a formidable post award consulting business

o 20+ years of proposal management and program architecture experience supporting $1B+ government acquisitions

DO MORE TOGETHER

The integration of the SMA Way and Rohirrim's leading RFP AI Automation Platform will pave the way for a future in which creating winning proposal responses is more attainable and scalable.

This partnership will supercharge both our customers, making it easier than ever for them to create compliant and compelling proposal submissions that rise above a crowded field of competitors in a fraction of the time.

Let's ride!

May 2022	August 2023	July 2024
Initial Discussions between SMA and Rohirrim	SMA Methodology Language Model Design and Training	Prototype Testing

A Winning Partnership

RohanRFP

- o Exclusive Patent on AI-Driven Proposal Methodology
- o Deep Integration with SMA's System Engineering Approach
- o Advanced Automation of Complex Proposal Tasks
- o World's First Methodology-Specific AI Model

The User

USER OUTCOMES

- o Tailored AI for Success with SMA Methodologies
- o Improved Compliance and Risk Management
- o AI-Driven Capture and Strategy Alignment

The SMA Way

- o Proven Legacy in Proposal Development
- o Long-Standing Industry Trust and Credibility
- o Essential Principles for Capture and Proposal Development
- o Proprietary Competitive Assessment (CA) / Price to Win (PTW) Methodology

ROHIRRIM

THE PROGRAM LIFECYCLE COMPANY
POWERED BY SMA TOD

Proposal Management Pain Points: 2022-2023

Pressure to grow faster and more cost effectively

Low RFP win rates

Teams stretched thin

35%

Say they regularly miss proposal submission deadlines.

62%

of organizations' win rates are less than 50%.

81%

Say they spend 30+ hours a week just on business development related activities.
18% of those in leadership positions spend 50+ hours on these activities.

Proposal Management Pain Points: 2024
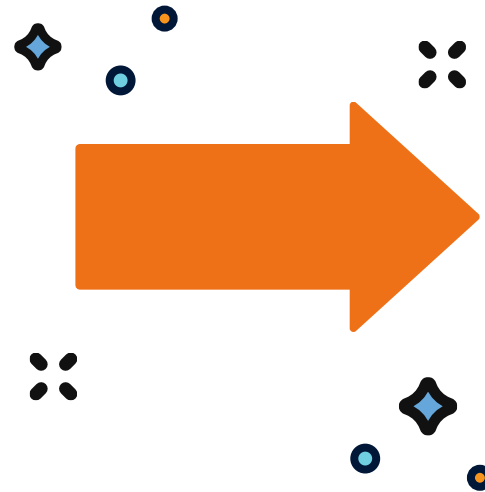
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Common Issues Across Industry

Reliance on gurus to Win (A)

Lack a robust Win Strategy and collaborative disciplined process that can be explicitly managed, and lead a Proposal Process with tradecraft that can be taught and result in predictable outcomes

(B) **Insufficient and ineffective Capture**

The common response to uncertainty is to wait, choosing to delay critical strategy actions to conserve precious funds, despite our better judgment

(C) **The proposal does not tell the why us story and does not differentiate**

Pursue a distinctive and compelling strategy that is expertly executed in capture and convincingly documented in the proposal

(D) **Unmanageable proposal costs**

Thoughtful application of a modern, tailored process

(E) **Unpredictable outcomes**

How do we know our activities will be effective?

Customer Events		Long-range Plan & Budget		SAM Notification			Acquisition / Source Selection Plan		Request for Proposal (DRFP) / RFP				Contract Award		Kickoff	1st	Milestone			

Program Phase	Campaign		Capture			Proposal		Contract		

Program Phase Elements	Market Franchises and Competitive Positioning	Pipeline Evaluation and Planning	Specific Opportunity Evaluation	Capture Strategy Development & Implementation	Pre-proposal Preparation	Proposal Development	Post-Submittal & Contract Preparation	Contract Startup	Contract Execution	Follow-on/ Derivative Contract Capture

Decision Gates: Offerability — Invest — Pursuit — Contestability — Initial Bid — Bid — Submit

Goals	3-5 Year Market Position Strategy	Robust Prioritized Pipeline	Qualified Target	Shape Competition	Strategy and Validated Solution	Winning Proposal	Defend Position	Establish Pace	Deliver Profitability	Leverage Growth

Select Internal Reviews: Pipeline · Black Hat · Win Strategy — Baselines · NAR/ICE · Proposal Reviews

The SMA Process is designed to address the five most common issues in Business Acquisition

Why Other Proposal Processes are Often Challenged

A waterfall approach (including many aspects of the Shipley processes) is designed to
create a coherent technical report modeled after traditional writing methods taught in school

TRADITIONAL APPROACH IS WRITING CENTRIC
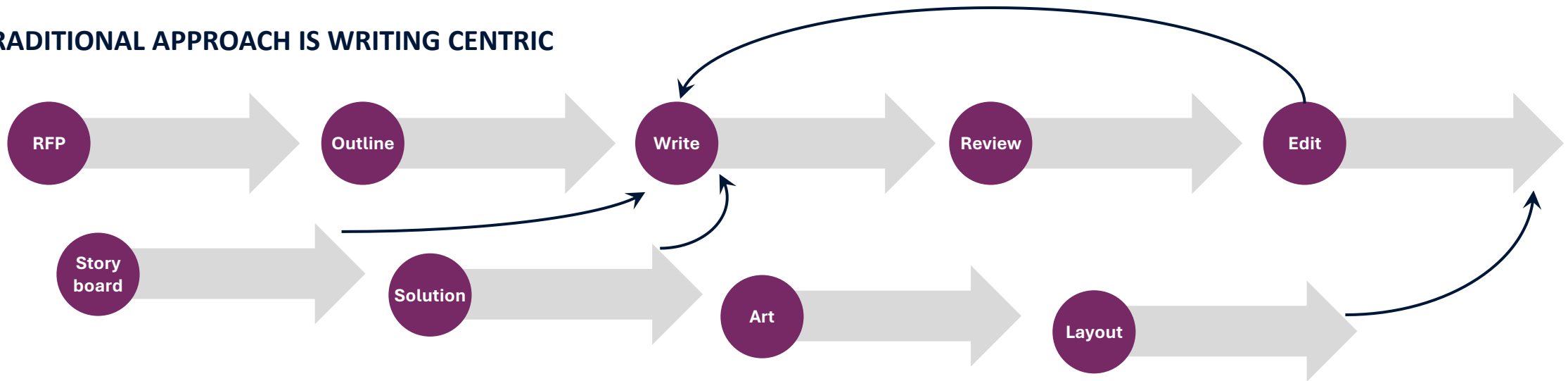
Appears to exhibit elements of best practices **but**

- Lacks clear line of sight between strategy and the end-product

- Generates unnecessary waste with solutioning and writing

- Quality is tested, not built-in

- Does not reduce the difficulty of writing for authors unaccustomed to "writing for persuasion"

- End product emerges in an *ad hoc* manner

Often-times results in the challenge of editing your way to a winning proposal

System Thinking Makes SMA Way Successful
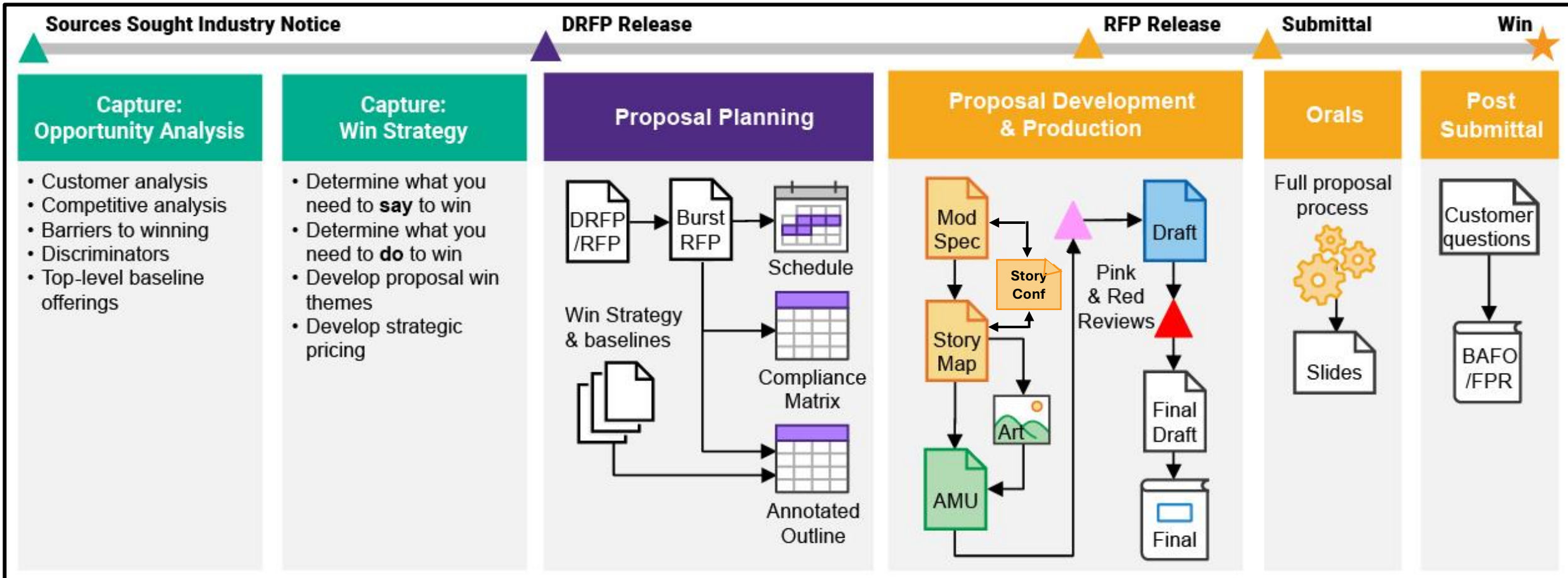
Aligning the Technology, to the Process, to the User

RohanRFP's integration of the SMA Way harnesses decades of expertise in proposal development and systems engineering, aligning AI to business processes that result in wins.
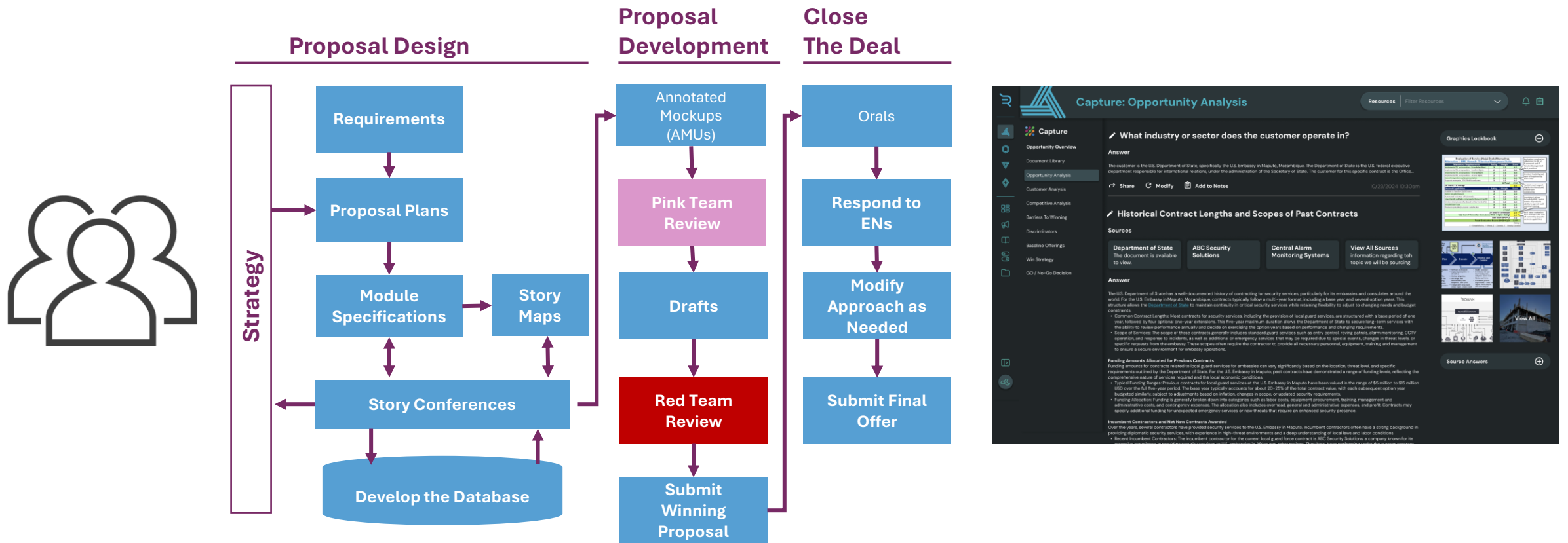
o Purpose-built to understand the entire SMA Way, from baselining solutions to managing work breakdown structures and risk mitigation

o Not a Generic AI System: Deep understanding of complex proposal processes through extensive pre-training on SMA Way

o Enables AI and human collaboration to execute the full business development and capture process: Opportunity Analysis, Customer Analysis, Competitive Analysis, Defining Discriminators, Baseline Offerings, and Win Strategies

o Generate SMA Way Module Specifications, Story Maps, and Annotated Mock-Ups - setting a new industry standard for detailed and compliant RFP responses

What is Rohan • The SMA Way

- Opportunity Analysis

- Deep Customer Analysis

- Competitive Analysis

- Barriers to Winning

- Discriminators

- Baseline Offerings

- Win Strategies

- Module Specifications

- Story Maps

- Annotated Mock Ups

Rohirrim | SMA Way: Compliance Matrix to Module Specifications

Application of systems thinking to winning business is core to the SMA Way

o Our proposal development tradecraft and processes provide enduring practices and that can be taught and when executed well, consistently produce predictable winning outcomes

o We also developed methodologies and processes for campaign strategy, CA/PTW, program architecture, program startup, milestone reviews and surveillance that are based on systems thinking principles

o Our services and solutions apply systems thinking to key activities across the program lifecycle from campaign planning to pursuit to proposal to program execution

SMA's SHAPE™ Solution guides capture activities	SMA's analytic-based Making Winning Choices™ approach to Win Strategy	SMA's systems engineering approach to proposal development
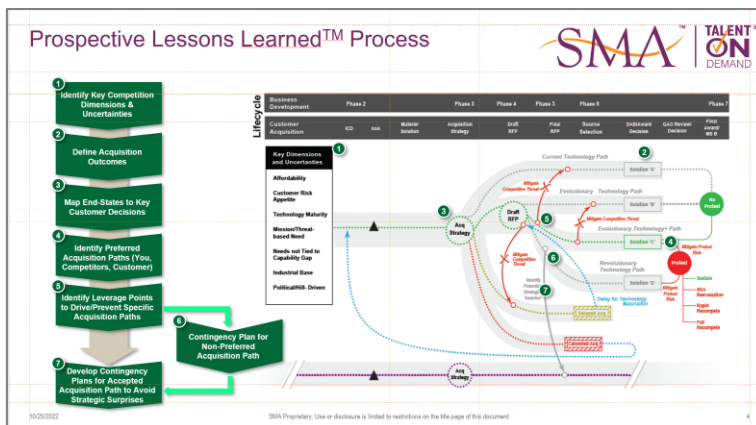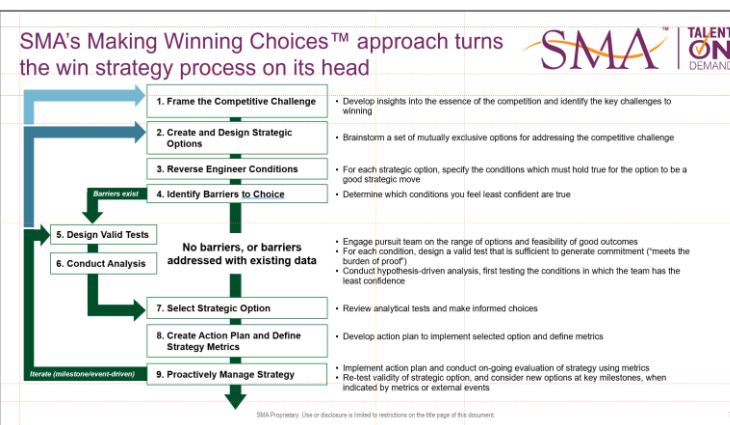
Dynamic Tension

Deliberately managed dynamic tension is an essential ingredient to creating a winning offer

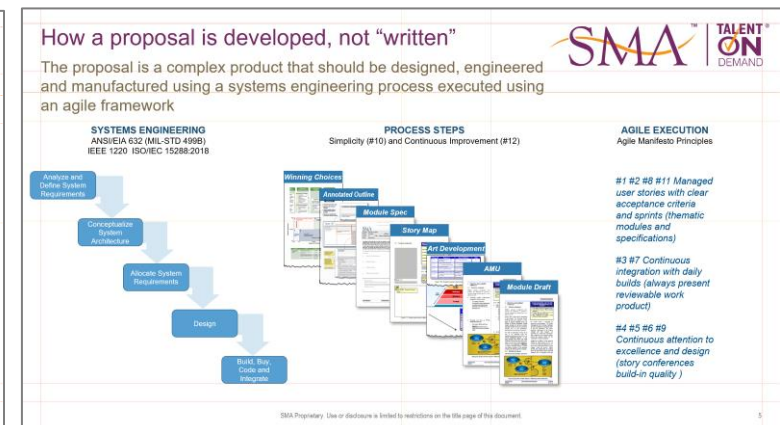*Advocate for feasibility*

Product/ Program Manager

Relationship Manager/BD Lead

Advocate for the Customer

Manage execution risk

Ambitious KPIs for available budget

Proposal Manager — *Load balancer*

The best solution for the lowest price

Solution Architect/ Engineer

Sales/Capture Manager

Advocate for winning

Achieve objective KPIs

Advocate for product performance