

ROHIRRIM



The Program
Lifecycle Company™



The SMA Way and the Future of Proposal AI

Steven Aberle + Jacque Keats

The SMA Way and the Future of Proposal AI

Steven Aberle and Jacque Keats



Steven Aberle



- Applied AI Engineer, NLP Researcher & Solutions Architect
- Founder, CEO of Rohirrim. The first organization - specific generative AI solution for enterprises
- Generative AI patents for proposal management, procurement and acquisition
- 18 years experience with complex technical architectures for commercial, aerospace, defense, and intelligence organizations



Jacque Keats



- Software Engineer with 30+ years of experience
- SMA Chief Operating Officer
- Developed and took to market 5 commercial enterprise software solutions
- Developed a formidable post award consulting business
- 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

Initial Discussions between SMA and Rohirrim

August 2023

SMA Methodology Language Model Design and Training

July 2024

Prototype Testing



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



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

Proposal Management Pain Points: 2022-2023



Pressure to grow faster and more cost effectively

35%

Say they regularly miss proposal submission deadlines.

Low RFP win rates

62%

of organizations' win rates are less than 50%.

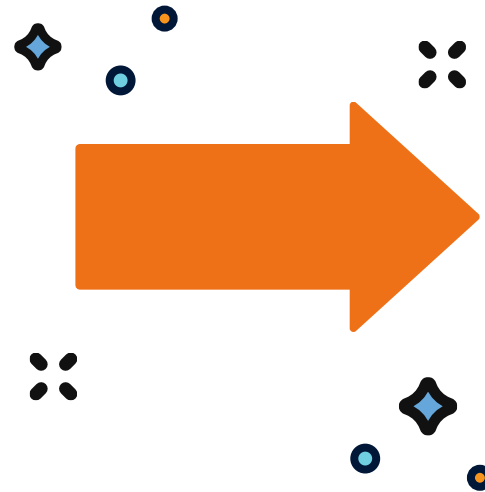
Teams stretched thin

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.



Press this button for
AI generated proposals!





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Common Issues Across Industry



A Reliance on gurus to Win

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

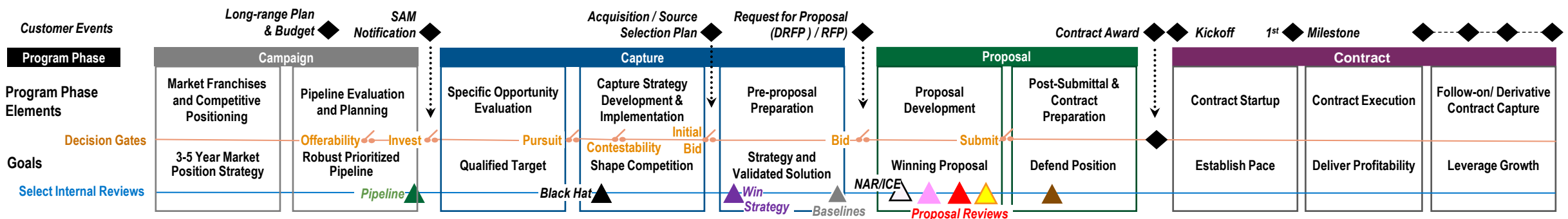
Pursue a distinctive and compelling strategy that is expertly executed in capture and convincingly documented in the proposal

D Unmanageable proposal costs

Thoughtful application of a modern, tailored process

E Unpredictable outcomes

How do we know our activities will be effective?



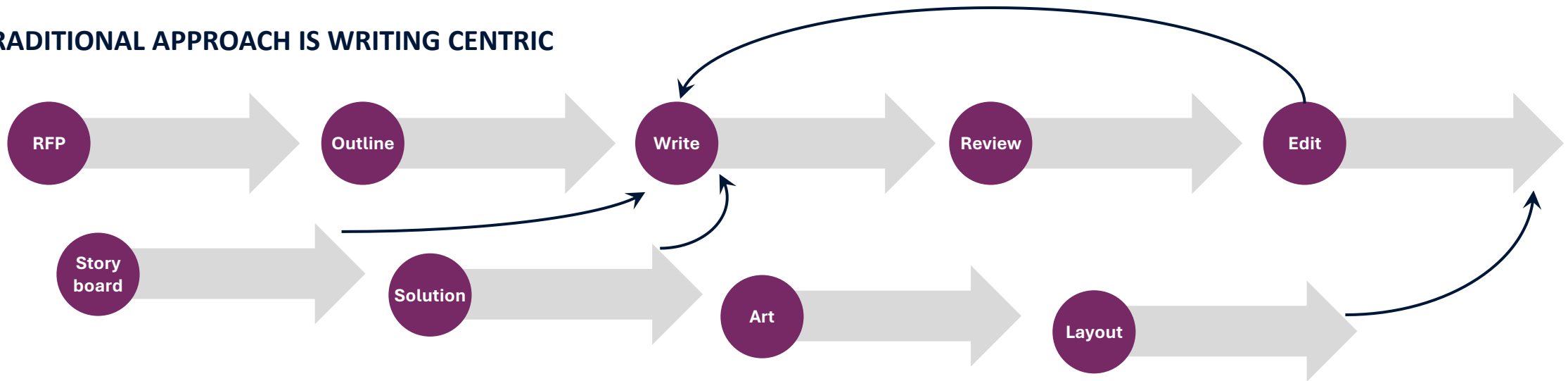
The SMA Process is designed to address the five most common issues in Business Acquisition

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

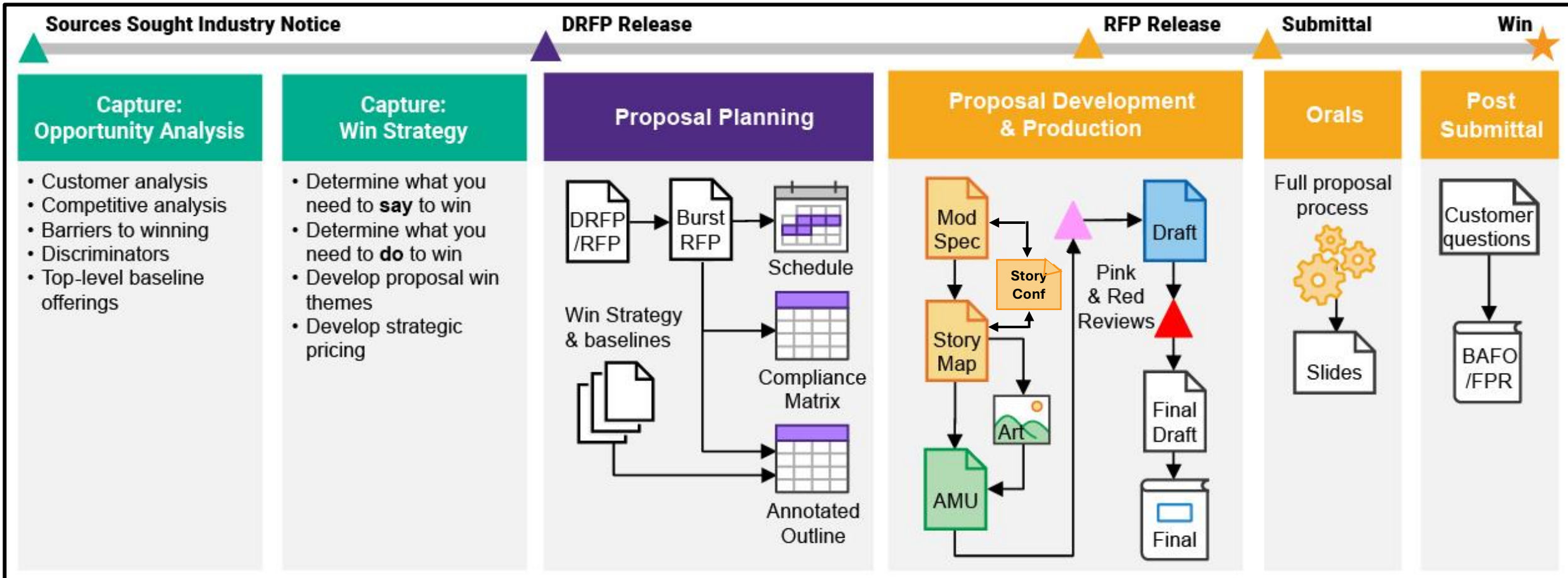


Appears to exhibit elements of best practices **but**

- 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

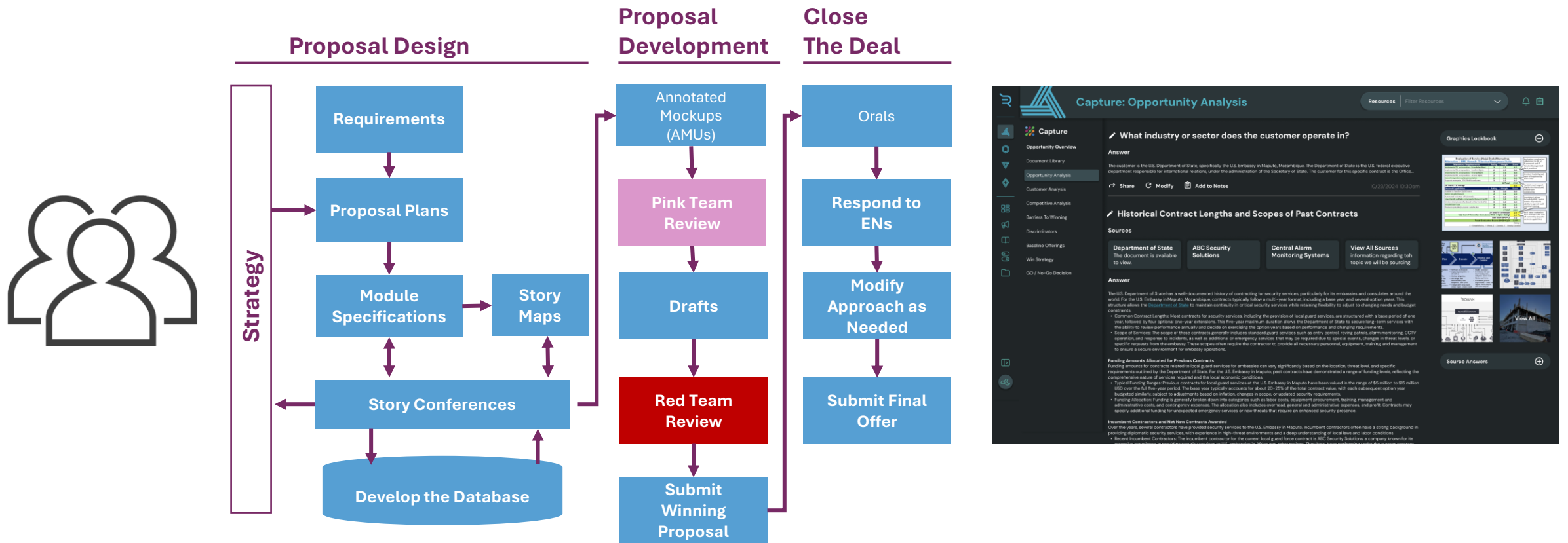
System Thinking Makes SMA Way Successful



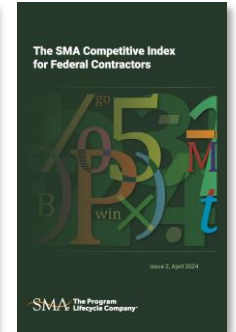
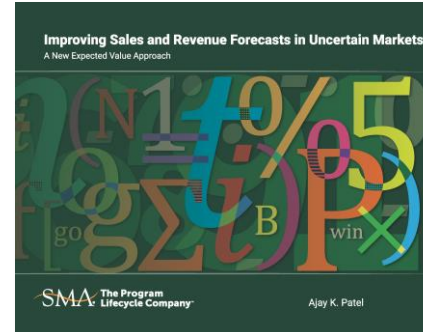
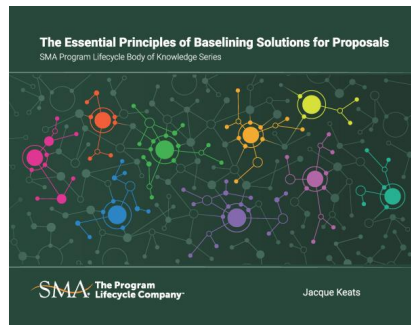
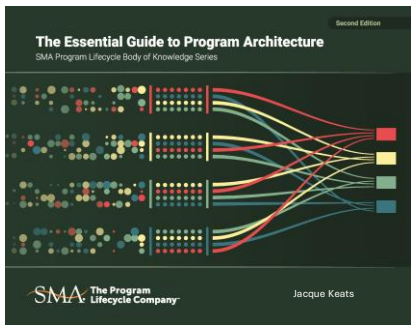
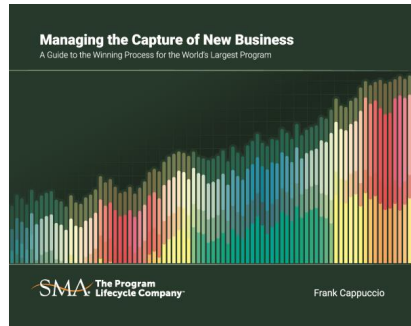
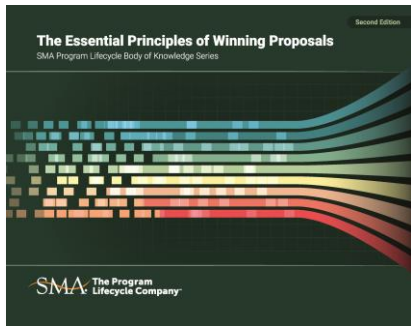
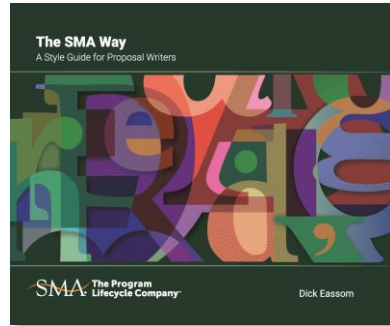
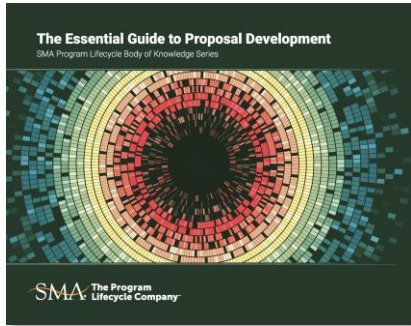
Aligning the Technology, to the Process, to the User



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.



What is Rohan • The SMA Way



- Purpose-built to understand the entire SMA Way, from baselining solutions to managing work breakdown structures and risk mitigation
- Not a Generic AI System: Deep understanding of complex proposal processes through extensive pre-training on SMA Way
- 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
- 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

Capture: Opportunity Analysis

Who is the customer (organization or individual) we are targeting?

Sources

- Office of Acquisition Management (A/LM/AQM)
- Organization Core Business Operations
- 19AQMM23R0166
- View All Sources information regarding the topic we will be sourcing.

Answer

The customer is the U.S. Department of State, specifically the U.S. Embassy in Maputo, Mozambique. The Department of State is the U.S. federal executive department responsible for international relations, under the administration of the Secretary of State. The customer for this specific contract is the [Office of Acquisition Management \(A/LM/AQM\)](#), which is part of the Bureau of Administration in the Department of State. This office oversees procurement and contracting functions, supporting diplomatic missions worldwide by providing secure environments for conducting diplomatic activities.

Industry or Sector the Customer Operates In

The customer operates in the government sector, particularly in diplomacy and international relations. As part of the U.S. government, the Department of State is tasked with leading the country's foreign policy, representing the U.S. in international affairs, and protecting U.S. citizens abroad. The services requested under this solicitation pertain to security services, which are crucial to the Department's mandate of safeguarding U.S. personnel, facilities, and interests in foreign countries.

Key Characteristics and Demographics of the Customer

Size and Locations of the Organization: The U.S. Department of State is a large organization with numerous overseas diplomatic missions, including embassies and consulates. The specific office managing this contract is located in Arlington, VA, United States, while the services required are for the U.S. Embassy in Maputo, Mozambique. The embassy's address is PO Box 783, Av. Marginal #5467 Sommerschild, Maputo, Mozambique. [Organization Core Business Operations:](#) The core operations of the Department of State, and by extension, the U.S. Embassy in Maputo, revolve around diplomacy, foreign policy, and international security. The embassy facilitates diplomatic relations between the United States and Mozambique, provides consular services, and protects U.S. citizens in Mozambique. Within this scope, ensuring the security of U.S. personnel, facilities, and sensitive information is critical, which is why local guard services are a vital component of the embassy's operations.

Summary of Background or Scope of Services

The scope of services for this contract is to provide local guard services for the U.S. Embassy in Maputo, Mozambique. This includes providing a secure environment for embassy operations, protecting U.S. government personnel, facilities, and equipment from damage or loss, and preventing unauthorized access and criminal or terrorist attacks. The local guard force (LGF) acts as a critical security layer, complementing other physical, technical, and procedural security measures. The [Performance Work Statement \(PWS\)](#) in Section C outlines that the primary mission of the LGF is to protect life and prevent damage or loss to U.S. Government property. The services include standard guard duties, additional or emergency guard services, vehicle patrols, CCTV monitoring, and response to security alarms. The contract involves a combination of Time-and-Materials (T&M) and Firm-Fixed Price components, reflecting the need for both predictable guard operations and flexibility to respond to evolving security threats.

Graphics Lookbook

Source Answers

10/23/2024 10:30am

Rohirrim | The SMA Way: Capture and Baselineing Solutions



Capture: Opportunity Analysis

Resources | Filter Resources

Capture

- Opportunity Overview
- Document Library
- Opportunity Analysis
- Customer Analysis
- Competitive Analysis
- Barriers To Winning
- Discriminators
- Baseline Offerings
- Win Strategy
- GO / No-Go Decision

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[View All Sources](#)
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Share
Modify
Add to Notes

10/23/2024 10:30am

Evaluation of Service (Bids) Desk Alternatives

Mandatory Requirements	Rating	Weight	Score
Compliance with base practices - Security Agency	2	1.5	3.0
Compliance with base practices - Change Mgmt.	2	1.5	3.0
Compliance with base practices - Admin Mgmt.	2	1.5	3.0
Cost of Acquisition and Implementation	2	1.5	3.0
Compliance with base practices - Risk Management	3	1.0	3.0
Total			15.0

2d Family - All Average

Desired Capabilities	Rating	Weight	Score
Security Management	2	1.0	2.0
Public Security Systems	2	1.0	2.0
Operational readiness of resources	3	1.0	3.0
Clear lines of body and access control (per US)	3	1.0	3.0
Emergency response capability based on current staff	3	1.0	3.0
Reliability of staff	2	0.5	1.0
Product reputation, customer satisfaction	2	0.5	1.0
Total			15.0

Final Score of Knowledge Base Lower POC - All Average

Final Score (per bid)	Final Score (per bid)
15.0	15.0
Total Evaluation Score (Mandatory)	30.0

Graphics Lookbook

Source Answers

Rohirrim | SMA Way: Compliance Matrix to Module Specifications



Proposal Writer

Resources | Filter Resources

Generate good times, come on! *Let's Generate!*

Please wait while we generate your outline for you... Actually, why wait? Feel free to go check out some of our other features while we generate your outline for you! If you're not completely satisfied with your proposal, go back and edit the tags you've highlighted in a previous step. If the outline looks good but you would like to edit some pieces then you can save and continue and edit to your heart's content!

Create a new proposal or edit an existing one. I'll analyze your summary and requirements against all of your company's artifacts and create solutions to help you along. Buckle up. You're about to become superhuman.

Back To All Proposals

Upload Files | Tag Files | Review Sections | **4 Compliance Matrix**

Undo | Redo | Save Matrix | Collapse Volumes | Download Matrix

Outline	Weighting/Scoring	Req. Paragraph	Req. Title	Req. Text
2 Technical Proposal (226 Items)				
	The Government will evaluate the Offeror's proposal on an Acceptable/Unacceptable basis. To be considered technically acceptable, the technical proposal must...			
	The Government will evaluate the Offeror's proposal on an Acceptable/Unacceptable basis. To be considered technically acceptable, the technical proposal must...	B.7.2	Radio Network and Hardware	Radio Network and Hardware: Contractor shall acquire and install dedicated frequencies, usage...
	The Government will evaluate the Offeror's proposal on an Acceptable/Unacceptable basis. To be considered technically acceptable, the technical proposal must...	B.7.2	Cell Phones	Cell Phones: The monthly rate include all costs associated with smart phones as required.
	The Government will evaluate the Offeror's proposal on an Acceptable/Unacceptable basis. To be considered technically acceptable, the technical proposal must...	B.7.2	Firearms and Ammunition	Firearms and Ammunition: If the Contractor shall...
	The Government will evaluate the Offeror's proposal on an Acceptable/Unacceptable basis. To be considered technically acceptable, the technical proposal must...	C.4	Local Guard Services	C.4 LOCAL GUARD SERVICES: The Contractor shall provide services in accordance with the Performance Work...

Previous Step | Continue to Proposal Writer

Proposals Details

Opportunity Title: RFP Shred DOS

Opportunity ID: RFP Shred DOS

Procurement Org: [Redacted]

Place of Performance: [Redacted]

Start Date - End Date: [Redacted]

Due Date: [Redacted]

Edit Proposal Details

Module Specification

Establishes Content

TALENT ON DEMAND

Questions 2 through 6 are MANDATORY; others may be added as required.

Approach is one-to-one match with Key Issues. Select themes and win actions from the Win Strategy Element tree.

Concise, clear statement of purpose. Use short bullet statements, NOT sentences and paragraphs.

Features describe what is distinctive about our approach. Benefits describe what these features mean to the customer.

- Prepared by Authors
- Each Module Specification is limited to a single topic
- The first 8 questions are standard; others may be added and tailored to the procurement

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What is Rohan • The SMA Way



Resources | Filter Resources

View All Proposals
Save Proposal
Download Proposal

Proposal Writer

RFP Shred SMA Way
Compliance Matrix | Module Specification | Story Mapping | Annotated Mock Up | Proposal

Highlight text to show options

VOLUME I – Technical Proposal

Help Desk Scope (C.1.1.1.1), (M.5)

Instruction Table

Instruction Paragraph Indicator	Instruction Title	Instruction Category	Instruction Text
L.7.1	Volume I	Technical Proposal	The written proposal shall consist of four (4) separate volumes: Volume I is Technical, Volume 1 A is the Technical Proposal for the Sample Task Orders, Volume II is Price, and Volume III is Administrative. (a) Cost information shall appear only in the Cost Proposal. (b) The page limits for the three (3) volumes are depicted in the table below. Volume Title Page Limit I Technical Proposal 200*

Evaluation Criteria Table

Paragraph Indicator	Evaluation Criteria / Factor Text
M.5	M.5 Technical Evaluation Areas/Factors M.5.1 Evaluation of all proposals submitted by the Offerors will be made in accordance with the factors outlined in this section. The following are the technical areas, in order starting with the most important, which the Senate will use to evaluate the Offeror's proposal. Solicitation 2012-R-050 Page 22 of 25 • Maintenance and Help Desk • Purchasing and Installation • Program Management • Inventory (including warehouse) • Past Performance • Optional Tasks • ISO/COOP • Optional Personnel • Transition

Requirement Table

Paragraph Indicator	Requirement Type	Requirement Text
C.1.1.1.1	Shall	C.1.1.1 Help Desk Scope C.1.1.1 The scope of Help Desk service includes but is not limited to, software application support, operating system support, file maintenance, workstation and laptop configuration, network configuration, network communications, remote access, peripheral support (printers, monitors, scanners, modems, etc.), server support, and general maintenance. Support for non-standard IT products shall be provided on a best effort basis as described in C.4.3.6.13.

Type in what you'd like to change about the response
Modify Document

Annotated Mock Up

"Full Scale Model of the Final Page" | Defines the Page Before Writing

NOTE: Authors' use of information in Annotated Outline is critical—remind them again!

Thesis Statement (from Annotated Outline) should be 35 words or less and summarizes:

- Our direct response to include primary proposal requirement
- Our approach and solution
- Our homework and qualifications reflected
- Customer benefits
- Quantified substantiation
- Points that are ideally unique for our competitors

Row and column headers minimum necessary for AMU

Bold assertion (claim)

Quantified substantiation

Figure callout guides reader to figure and key information

Action caption succinctly presents the message

Define central message statements for each paragraph

Bulleted essence points represent paragraphs and content allocated to each page (short and punchy; no sentences)

Ready for Review when:

- The Thesis Statement summarizes our response
- The message and supporting facts are defined for every paragraph
- All figures are complete and each conveys a clear message
- The reader gains a sense of the overall "story"
- Win strategy themes are clearly planted
- Prepared by Authors
- Recent reviews by Volume Lead
- Full scale model of the final pages with bulleted essence statements

Refine action caption

Action caption states the "message" of the graphic

Keep it crisp

Full sentence

Write the art, don't illustrate the text

Replace figure placeholders with draft tables and graphics

Focus art on ONE idea

Highlight the BENEFITS

Make the message clear

Create graphics that amplify text

Avoid cartoon-type illustrations

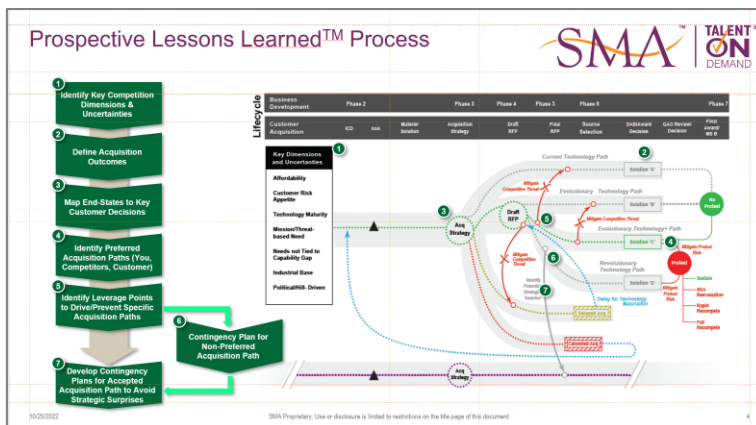
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Application of systems thinking to winning business is core to the SMA Way

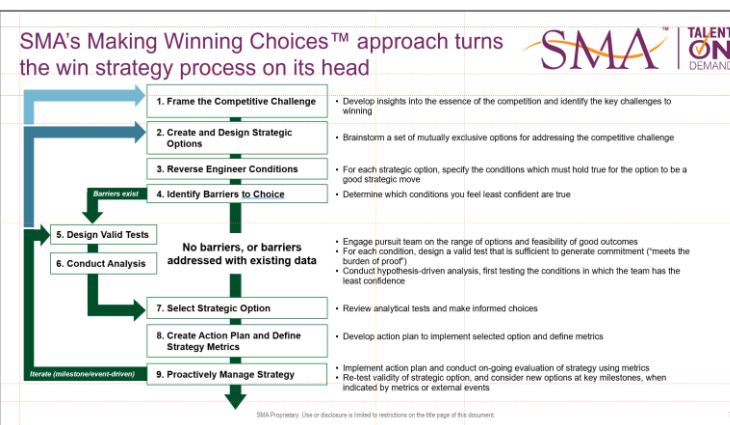


- Our proposal development tradecraft and processes provide enduring practices and that can be taught and when executed well, consistently produce predictable winning outcomes
- We also developed methodologies and processes for campaign strategy, CA/PTW, program architecture, program startup, milestone reviews and surveillance that are based on systems thinking principles
- Our services and solutions apply systems thinking to key activities across the program lifecycle from campaign planning to pursuit to proposal to program execution

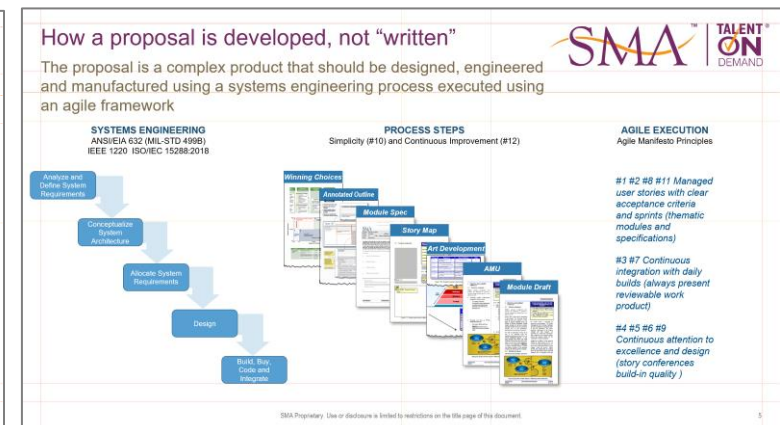
SMA's SHAPE™ Solution guides capture activities



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

