



From Bland to Grand

Make WINNING Orals Faster

Presented by:
Some Guy



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DISCOVER

Extract input from the RFP, DRFP, or past versions—get the lay of the land.

ESSENSE

Outline requirements and structure your presentation.

SCRIPT

Draft content and notes for each slide—your narrative backbone.

IMAGINE

Visualize graphics and rough layouts—sketch and conceptualize.

GAUGE

Test and review the draft slides with stakeholders or teammates.

NAIL IT DOWN

Render final slides—professional design, polished delivery.



Modify as Needed

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REQUEST for PROPOSAL (RFP)

Issued By: Horizon Learning Institute (HLI)

RFP Title: Enhancing L&D Efficiency through Automation and AI

Response Format: Oral Presentation (6 Slides Total)

Background:

Horizon Learning Institute (HLI) is a nationally recognized institution committed to educational innovation and continuous professional development. HLI's Learning & Development (L&D) department supports over 1,500 faculty and staff across 20 programs and 5 campuses.

As our demand for high-quality training materials grows, we are seeking a solution that improves speed and cost-efficiency—while improving instructional quality.

Project Objective:

HLI seeks a partner to help **automate and enhance L&D standard operating procedures** by incorporating AI, automation tools, or similar cost technologies. The desired solution will support our instructional design teams by streamlining course content creation, increasing consistency and quality, and reducing development time.

Proposal Requirements:

1. Intelligent Content Creation

Demonstrate how your solution uses automation or AI to assist in rapid, high-quality development of learning materials (e.g., lesson plans, modules, microlearning). Include examples or approaches relevant to higher education or faculty/staff training.

2. Optimized Workflow

Explain how your solution will be integrated into HLI's existing content development workflows. Describe tools, systems, and processes you'll automate or streamline. Simplicity and ease of adoption are key.

3. Management

Describe how the solution will be governed, scaled, and supported over time. Include training, user support, change management, and how you will ensure long-term success and adaptability. HLI is looking for a long-term, sustainable solution—not just a quick fix.

HLI Goals:

- Increase the speed of course development time
- Reduce overall L&D development costs
- Make it easy for non-technical staff to use the solution

Oral Proposal Format will be a 30 minutes delivery including 10 minutes of Q&A with 6 Slides Maximum including title and QA slide. One slide per requirement.

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Slide #3

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Slide #4

2. Optimized Workflow

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Slide #5

3. Management

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Slide #1

Slide #6

1. **Title Slide** (title, to, from, branding, date)

2. **Agenda Slide**

a) Message/overview to provide context

} Use as our
Executive Summary

3. **Intelligent Content Creation**

a) Demonstrate how your solution uses automation or AI to assist in rapid, high-quality development of learning materials (e.g., lesson plans, modules, microlearning). Include examples or approaches relevant to higher education or faculty/staff training.

4. **Workflow Optimization & Integration**

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6. **Q&A Slide**

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Copilot

Copilot AI generated content may be incorrect

Sure, I can help with that! Based on the content of your document, here is a suggested outline for your presentation:

Slide 1: Title Slide

- Title: Enhancing L&D Efficiency through Automation and AI
- Subtitle: Request for Proposal (RFP) by Horizon Learning Institute (HLI)
- Presenter: [Your Name]

Slide 2: Background

- Introduction to Horizon Learning Institute (HLI)
- Overview of HLI's Learning & Development (L&D) Department
- Current challenges and need for improved speed and cost-efficiency in training materials

Slide 3: Project Objective

- Goal: Automate and enhance L&D standard operating procedures
- Desired solution: Incorporate AI, automation tools, or similar cost-effective technologies
- Benefits: Streamline course content creation, increase consistency, quality, reduce development time

Slide 4: Intelligent Content Creation

- Demonstrate how automation or AI assists in rapid, high-quality development of learning materials
- Examples or approaches relevant to higher education/faculty/staff training

Slide 5: Optimized Workflow

- Integration into HLI's existing content development workflows
- Tools, systems, and processes to be automated or streamlined
- Emphasis on simplicity and ease of adoption

Slide 6: Management

- Governance, scaling, and support over time
- Training, user support, change management
- Ensuring long-term success and adaptability

Slide 7: HLI Goals

- Increase the speed of course development time
- Reduce overall L&D development costs
- Make it easy for non-technical staff to use the solution

Slide 8: Q&A

- Open floor for questions and answers

Some inspiration but too many slides.

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Slide 6: Management

- Governance, scaling, and support over time
- Training, user support, change management
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This outline should help you structure your presentation effectively. Let me know if you need any further assistance!

🗑️ 👍 🗨️

Can you add speaker notes? Can you include visuals? 🔄

+ Message Copilot 🌐 🗣️

Missing Q&A slide.

1. **Title Slide** (title, to, from, branding, date)
2. **Agenda Slide**
 - a) Message/overview to provide context
3. **Intelligent Content Creation**
 - a) Demonstrate how your solution uses automation or AI to assist in rapid, high-quality development of learning materials (e.g., lesson plans, modules, microlearning). Include examples or approaches relevant to higher education or faculty/staff training.
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1. Title Slide (title, to, from, branding, date)

Narrative:

Hi everyone, and thanks for having us. We know HLI is looking for a smart, sustainable way to enhance your L&D processes—and that's exactly what we're here to deliver. We've built a solution that's practical, easy to adopt, and built to last.

2. Agenda Slide

a) Message/overview to provide context

Based on insight + the RFP, HLI goals are:

- Number one: **improve quality**
- **Increase speed** of course development time
 - Make it easy
- **Reduce costs**

Narrative:

Got metrics? USE THEM!
4X 20% MOTIVATOR

Develop courses ^{4X} faster, lower cost, ^{20%} and increase quality with our easy to use, future-proof **R.A.C.E.** L&D automation solution.

↑
Package and "brand" your solution
(RAPID AUTHORIZING of COURSES & EDUCATION)

↑
MEANS

3 Archetypes!

Note to SMEs/presenters: Must answer What and How in our story. **What** is R.A.C.E. (MUST include what makes it easy to use and future-proof)? **How** does R.A.C.E. develop courses faster, lower cost, and increase quality?

3. Intelligent Content Creation

a) Demonstrate how your solution uses automation or AI to assist in rapid, high-quality development of learning materials (e.g., lesson plans, modules, microlearning). Include examples or approaches relevant to higher education or faculty/staff training.

Narrative:

Our Solution: AI-Powered Learning Design ← **MACRO**

We leverage AI-assisted content tools to accelerate the creation of high-quality instructional materials while ensuring alignment with higher education best practices. Our approach includes:

Automated Lesson Blueprinting

Our platform uses AI to convert learning objectives into customized lesson plans, including content outlines, assessments, and recommended media—within minutes. (Example: Faculty uploads a syllabus → AI generates module structures, quizzes, and engagement prompts aligned with Bloom’s taxonomy.)

Smart Module Builders

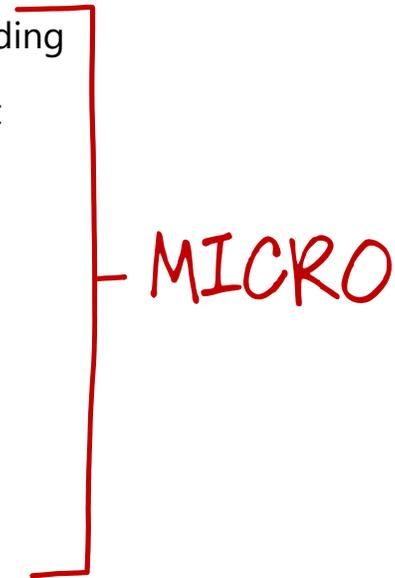
Drag-and-drop interfaces with embedded AI recommend content blocks (videos, scenarios, knowledge checks) based on course goals and learner profiles. (Relevant for both faculty onboarding and program-specific upskilling.)

Microlearning Generator

Upload a document or recorded lecture, and our system automatically creates short, mobile-friendly modules with key takeaways, flashcards, and optional AI-generated narration. (Saves hours of development time and boosts retention.)

Use Case: Faculty Training Series

HLL’s internal team needed a 6-part training series for new instructors. Using our tools, the content was drafted, reviewed, and ready for deployment in just 5 days—a process that previously took 3–4 weeks.



DIRECT BENEFITS

- Speeds up development by up to 60%
- Ensures consistency across programs
- Supports both novice and advanced instructional designers
- Scales easily across departments

↑
**CONNECT
the DOTS**

4. Workflow Optimization & Integration

- a) Explain how your solution will be integrated into HLI's existing content development workflows. Describe tools, systems, and processes you'll automate or streamline. Simplicity and ease of adoption are key.

Narrative:

Our Solution: Seamless Integration, Streamlined Production

We designed our solution to fit into existing HLI content development workflows—not replace them. Our tools enhance what your team is already doing, while simplifying and speeding up each phase.

Plug & Play with Existing Systems

We integrate directly with tools HLI already uses—like LMS platforms (e.g., Canvas, Blackboard), SharePoint, and Google Workspace—so there's no need for disruptive change. (Example: Faculty create drafts in Google Docs → AI assistant refines, formats, and uploads to LMS with one click.)

Automated Review & Version Control

Our solution tracks revisions, flags inconsistencies, and ensures all course materials meet instructional design standards **before** they go live. (Cuts down manual reviews and minimizes back-and-forth.)

Streamlined Collaboration

Built-in task boards, content approval workflows, and notifications help L&D teams, SMEs, and reviewers stay in sync—without adding more tools. (One-click assignments, auto-deadlines, and AI-generated task summaries keep things moving smoothly.)

Use Case: Multi-Department Course Launch

In a recent deployment, a university used our system to coordinate 3 departments developing a cross-listed course. What took 6 weeks previously was done in 2.5 weeks—with better visibility and less stress.

DIRECT BENEFITS

- Integrates with your existing tools
- Reduces manual handoffs and rework
- Easy for faculty and staff to adopt
- Transparent, trackable, and scalable

5. Management

- a) Describe how the solution will be governed, scaled, and supported over time. Include training, user support, change management, and how you will ensure long-term success and adaptability. HLI is looking for a long-term, sustainable solution—not just a quick fix.

Narrative:

Our Solution: Built for long-term success

We don't just deliver tools—we deliver a framework for sustainable success. Our approach covers governance, training, user support, and change management to ensure HLI achieves lasting value from this initiative.

Governance & Oversight

We establish a joint Governance Team (HLI + our experts) to guide strategy, monitor performance, and ensure alignment with your goals.

- Quarterly reviews
- Clear roles/responsibilities
- Agile improvement cycles

Scalable Training & Onboarding

We provide tiered training for different user groups (L&D staff, faculty, admins) through:

- Live and on-demand sessions
- Interactive job aids and walkthroughs
- "Train-the-trainer" program to scale internally

Embedded User Support

Ongoing, human-centered support includes:

- Dedicated client success manager
- 24/7 in-app support + response SLA
- User feedback loop integrated into product evolution

Change Management Made Simple

We provide a change roadmap with:

- Clear communication plans
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Ensuring Long-Term Success

We help HLI adapt over time through:

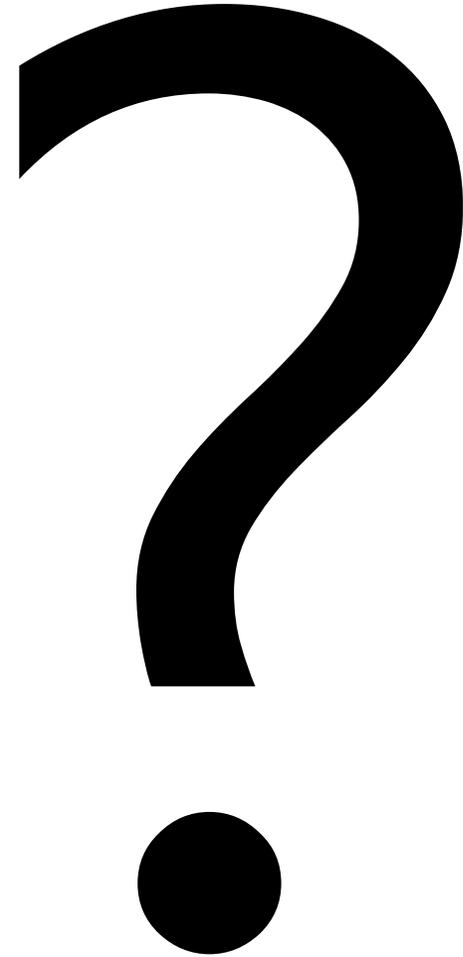
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- Annual impact reviews + optimization plans

DIRECT BENEFITS

- Sustainable and scalable solution
- High adoption and satisfaction rates
- Built-in flexibility for future needs
- You're never on your own—we grow with you

6. Q&A

HLI develops courses faster, lowers cost, and increases quality with Advance's easy to use, future-proof R.A.C.E. L&D automation solution.



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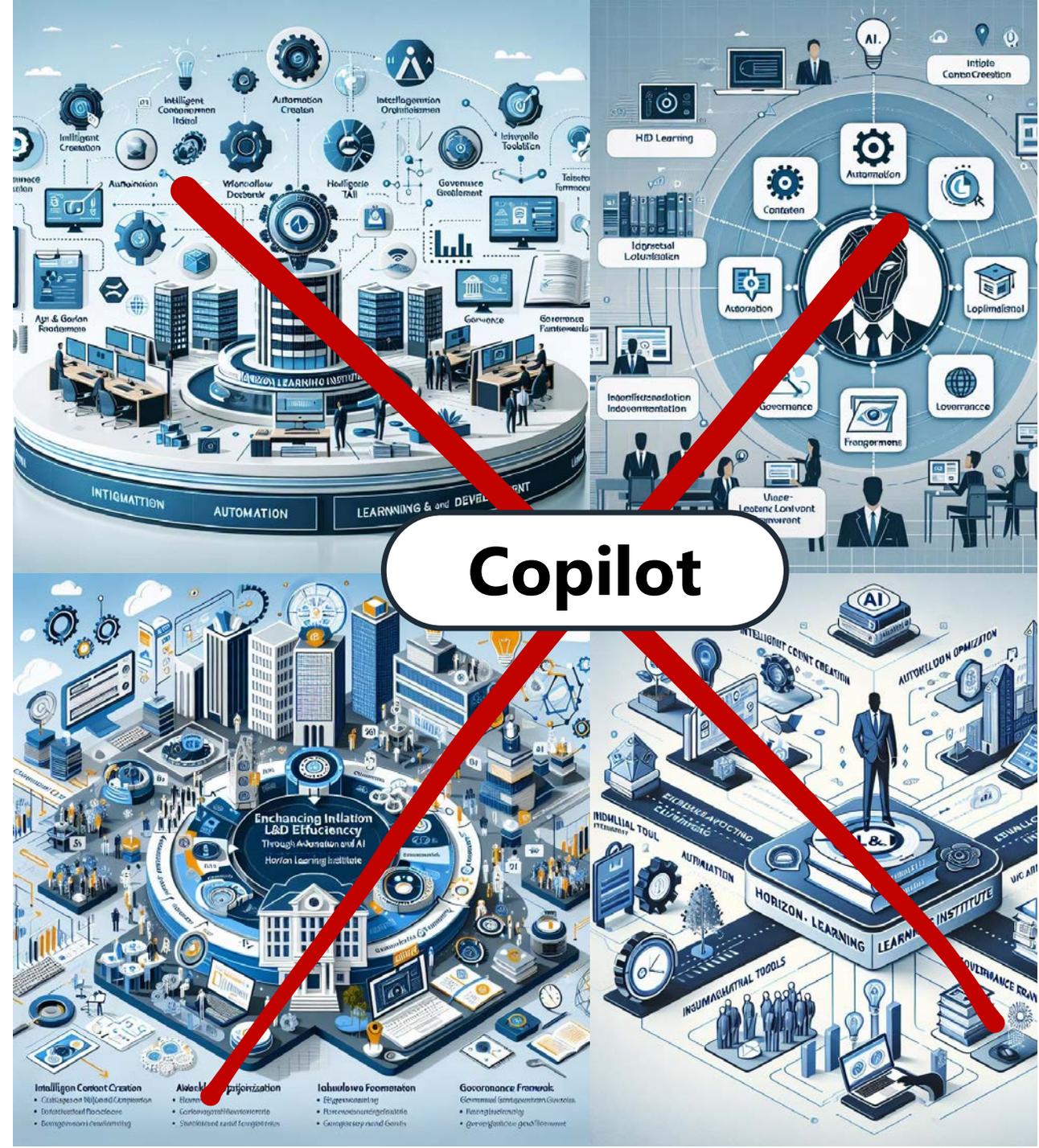
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Drag-and-drop interfaces with embedded AI recommend content blocks (videos, scenarios, knowledge checks) based on course goals and learner profiles. (Relevant for both faculty onboarding and program-specific upskilling.)

ChatGPT



Microlearning Generator

Upload a document or recorded lecture, and our system automatically creates short, mobile-friendly modules with key takeaways, flashcards, and optional AI-generated narration. (Saves hours of development time and boosts retention.)



Use Case: Faculty Training Series

HLI's internal team needed a 6-part training series for new instructors. Using our tools, the content was drafted, reviewed, and ready for deployment in just 5 days—a process that previously took 3–4 weeks.

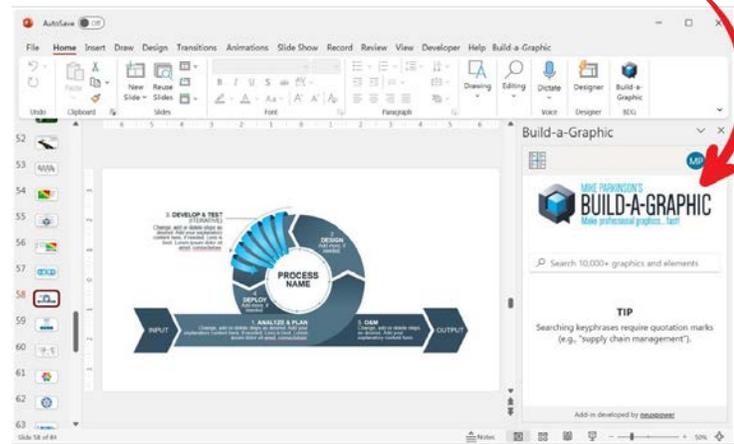
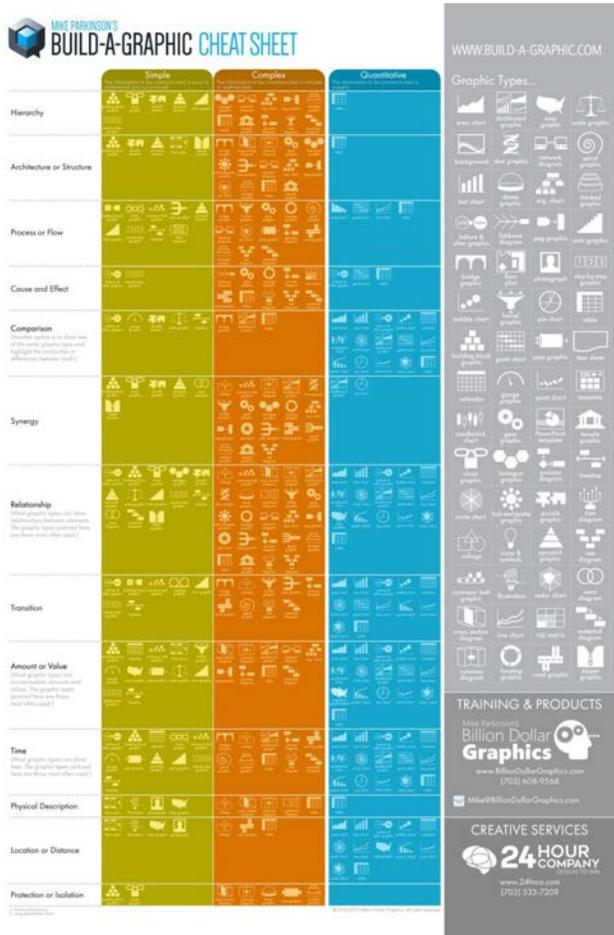
CURATED INSPIRATION!

GRAPHIC CHEAT SHEET

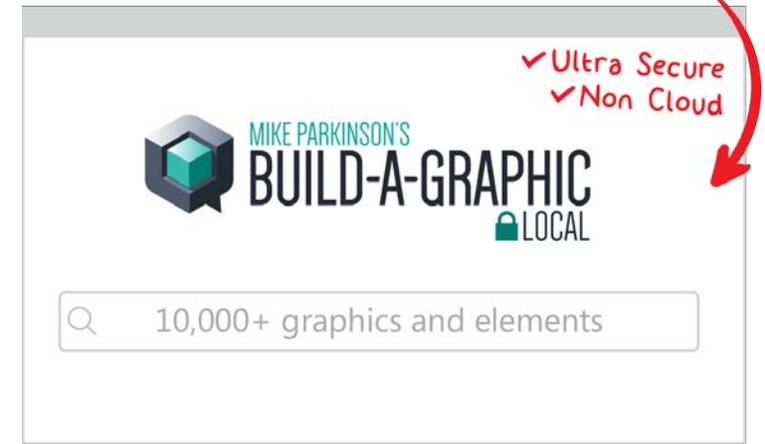
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FREE in this session!
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FREE for inspiration!

1. Title Slide (title, to, from, branding)

Narrative:

Hi everyone, and thanks for having us. We know HLI is looking for a smart, sustainable way to enhance your L&D processes—and that's exactly what we're here to deliver. We've built a solution that's practical, easy to adopt, and built to last.

2. Agenda Slide

a) Message/overview to provide context

Based on insight + the RFP, HLI goals are:

- Number one: **improve quality**
- **Increase speed** of course development time
 - Make it easy
- **Reduce costs**

Narrative:

Develop courses faster, lower cost, and increase quality with our easy to use, future-proof R.A.C.E. L&D automation solution.

Note to SMEs/presenters: Must answer What and How in our story. **What** is R.A.C.E. (MUST include what makes it easy to use and future-proof)? **How** does R.A.C.E. develop courses faster, lower cost, and increase quality?

3. Intelligent Content Creation

a) Demonstrate how your solution uses automation or AI to assist in rapid, high-quality development of learning materials (e.g., lesson plans, modules, microlearning). Include examples or approaches relevant to higher education or faculty/staff training.

Narrative:

Our Solution: AI-Powered Learning Design

We leverage AI-assisted content tools to accelerate the creation of high-quality instructional materials while ensuring alignment with higher education best practices. Our approach includes:

Automated Lesson Blueprinting

Our platform uses AI to convert learning objectives into customized lesson plans, including content outlines, assessments, and recommended media—within minutes. (Example: Faculty uploads a syllabus → AI generates module structures, quizzes, and engagement prompts aligned with Bloom's taxonomy.)

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DIRECT BENEFITS

- Speeds up development by up to 60%
- Ensures consistency across programs
- Supports both novice and advanced instructional designers
- Scales easily across departments

4. Workflow Optimization & Integration

a) Explain how your solution will be integrated into HLI's existing content development workflows. Describe tools, systems, and processes you'll automate or streamline. Simplicity and ease of adoption are key.

Narrative:

Our Solution: Seamless Integration, Streamlined Production

We designed our solution to fit into existing HLI content development workflows—not replace them. Our tools enhance what your team is already doing, while simplifying and speeding up each phase.

Plug & Play with Existing Systems

We integrate directly with tools HLI already uses—like LMS platforms (e.g., Canvas, Blackboard), SharePoint, and Google Workspace—so there's no need for disruptive change. (Example: Faculty create drafts in Google Docs → AI assistant refines, formats, and uploads to LMS with one click.)

Automated Review & Version Control

Our solution tracks revisions, flags inconsistencies, and ensures all course materials meet instructional design standards **before** they go live. (Cuts down manual reviews and minimizes back-and-forth.)

Streamlined Collaboration

Built-in task boards, content approval workflows, and notifications help L&D teams, SMEs, and reviewers stay in sync—without adding more tools. (One-click assignments, auto-deadlines, and AI-generated task summaries keep things moving smoothly.)

Use Case: Multi-Department Course Launch

In a recent deployment, a university used our system to coordinate 3 departments developing a cross-listed course. What took 6 weeks previously was done in 2.5 weeks—with better visibility and less stress.

DIRECT BENEFITS

- Integrates with your existing tools
- Reduces manual handoffs and rework
- Easy for faculty and staff to adopt
- Transparent, trackable, and scalable

5. Management

a) Describe how the solution will be governed, scaled, and supported over time. Include training, user support, change management, and how you will ensure long-term success and adaptability. HLI is looking for a long-term, sustainable solution—not just a quick fix.

Narrative:

Our Solution: Built for long-term success

We don't just deliver tools—we deliver a framework for sustainable success. Our approach covers governance, training, user support, and change management to ensure HLI achieves lasting value from this initiative.

Governance & Oversight

We establish a joint Governance Team (HLI + our experts) to guide strategy, monitor performance, and ensure alignment with your goals.

- Quarterly reviews
- Clear roles/responsibilities
- Agile improvement cycles

Scalable Training & Onboarding

We provide tiered training for different user groups (L&D staff, faculty, admins) through:

- Live and on-demand sessions
- Interactive job aids and walkthroughs
- "Train-the-trainer" program to scale internally

Embedded User Support

Ongoing, human-centered support includes:

- Dedicated client success manager
- 24/7 in-app support + response SLA
- User feedback loop integrated into product evolution

Change Management Made Simple

We provide a change roadmap with:

- Clear communication plans
- Faculty champions and peer advocates
- Checkpoints to build confidence and reduce friction

Ensuring Long-Term Success

We help HLI adapt over time through:

- Regular tech and process health checks
- Access to innovation labs for early features
- Annual impact reviews + optimization plans

DIRECT BENEFITS

- Sustainable and scalable solution
- High adoption and satisfaction rates
- Built-in flexibility for future needs
- You're never on your own—we grow with you

6. Q&A

HLI develops courses faster, lowers cost, and increases quality with Advance's easy to use, future-proof R.A.C.E. L&D automation solution.



Context is king!

ADVANCE

Title of Prop here

Date

To From

AGENDA

(A) INCREASE QUALITY (B) Develop faster (C) Lower Cost

MANAGEMENT

EIB Intelligent Content Creation

Optimized Workflow

RACE

INTELLIGENT CONTENT CQA

(1) Automated Lesson Blueprint

(2) SMART MODULE BUILDER

(3) Microlearning Generator

BENEFIT

USE CASE

WORKFLOW OPTIMIZATION + INTEG

Streamline Collab

Automation Review + Version Control

Plug & Play

BENEFIT

USE CASE

MANAGEMENT Governance, Training ...

Governance TRAINING VS CHANGE LONGTERM

BENEFIT

Q&A

(Show image of connecting dots?)

HLI Develops courses faster, lower cost, + increases quality w/ advanced RACE L&D solution !!

Contrast is queen!

D

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DISCOVER

Extract input from the RFP, DRFP, or past versions—get the lay of the land.

ESSENSE

Outline requirements and structure your presentation.

SCRIPT

Draft content and notes for each slide—your narrative backbone.

IMAGINE

Visualize graphics and rough layouts—sketch and conceptualize.

GAUGE

Test and review the draft slides with stakeholders or teammates.

NAIL IT DOWN

Render final slides—professional design, polished delivery.



Modify as Needed

ADVANCE

Title of
Prop here

Date

To

From

△ | AGENDA

(A)
INCREASE
QUALITY

(B)
DEVELOP
FASTER

(C)
LOWER
COST

MANAGEMENT

EB
Intelligent
Content
Creation



Optimized
Workflow

RACE

✓ —
✓ —

✓ —
✓ —

✓ —
✓ —

△ | INTELLIGENT CONTENT CREATOR

Ⓐ Ⓑ Ⓒ

① Automated Lesson Blueprint

③
Microlearning
Generator



② SMART
MODULE
BUILDER



BENEFITS



USE CASE

Q1 Q+A

(Show image
of connecting
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HFI Develops courses
FASTER, lower cost, +
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LAD solution !!

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Modify as Needed

DIRECTION

BRANDING

We can't use HLI's logo. They frown upon it because it assumes endorsement. We will be using Advance's branding to be safe.

MORE TEXT

The slides will be referenced after we present. Include as much narrative as possible. (It's easier to remove text vs. add it.)



ADVANCE

Enhancing L&D Efficiency through Automation and AI

May 20, 2025

SUBMITTED TO:

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Tamara.Green@hli.com
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SUBMITTED BY:

Steve Kay
Advance, LLC
Steve.Kay@advance.com
703.555.1234



**INCREASE
QUALITY**



**DEVELOP
COURSES FASTER**



**LOWER
COST**

MANAGEMENT
Governance, Training, User Support, Change Management



Intelligent
Content
Creation



Optimized
Workflow

R.A.C.E.
RAPID AUTHORING of
COURSES & EDUCATION

- ✓ Seamless Integration
- ✓ More Consistency

- ✓ Automated
- ✓ On Demand

- ✓ Easy to Use
- ✓ Adaptable/Modular

*Our
solution*

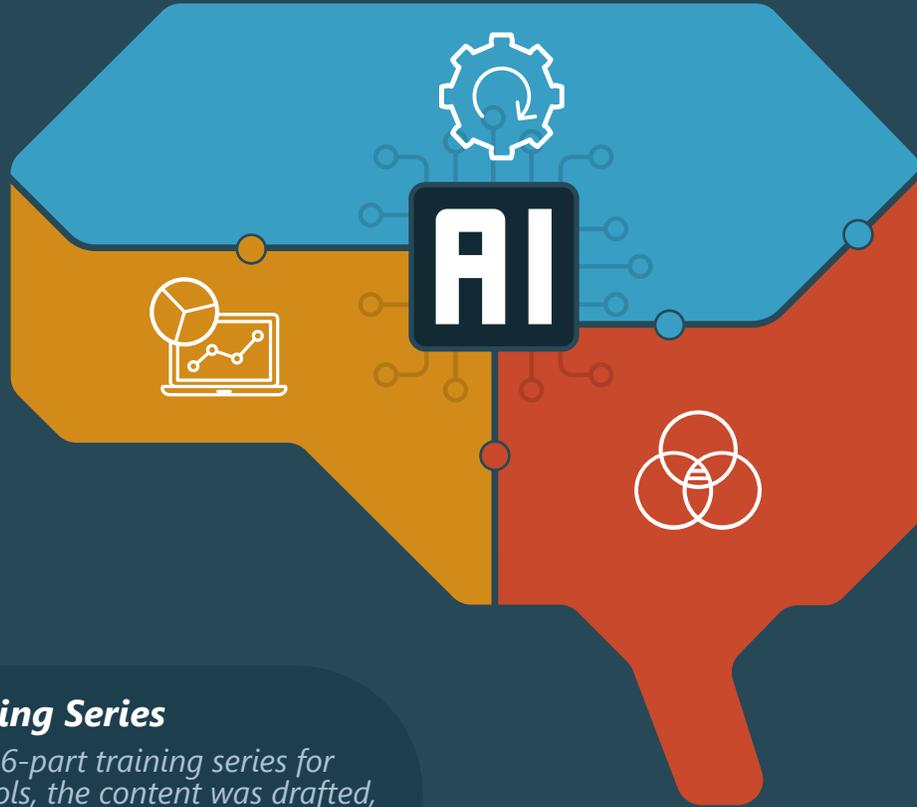
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Why us.

 = ADVANCE Advantages

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MANAGEMENT

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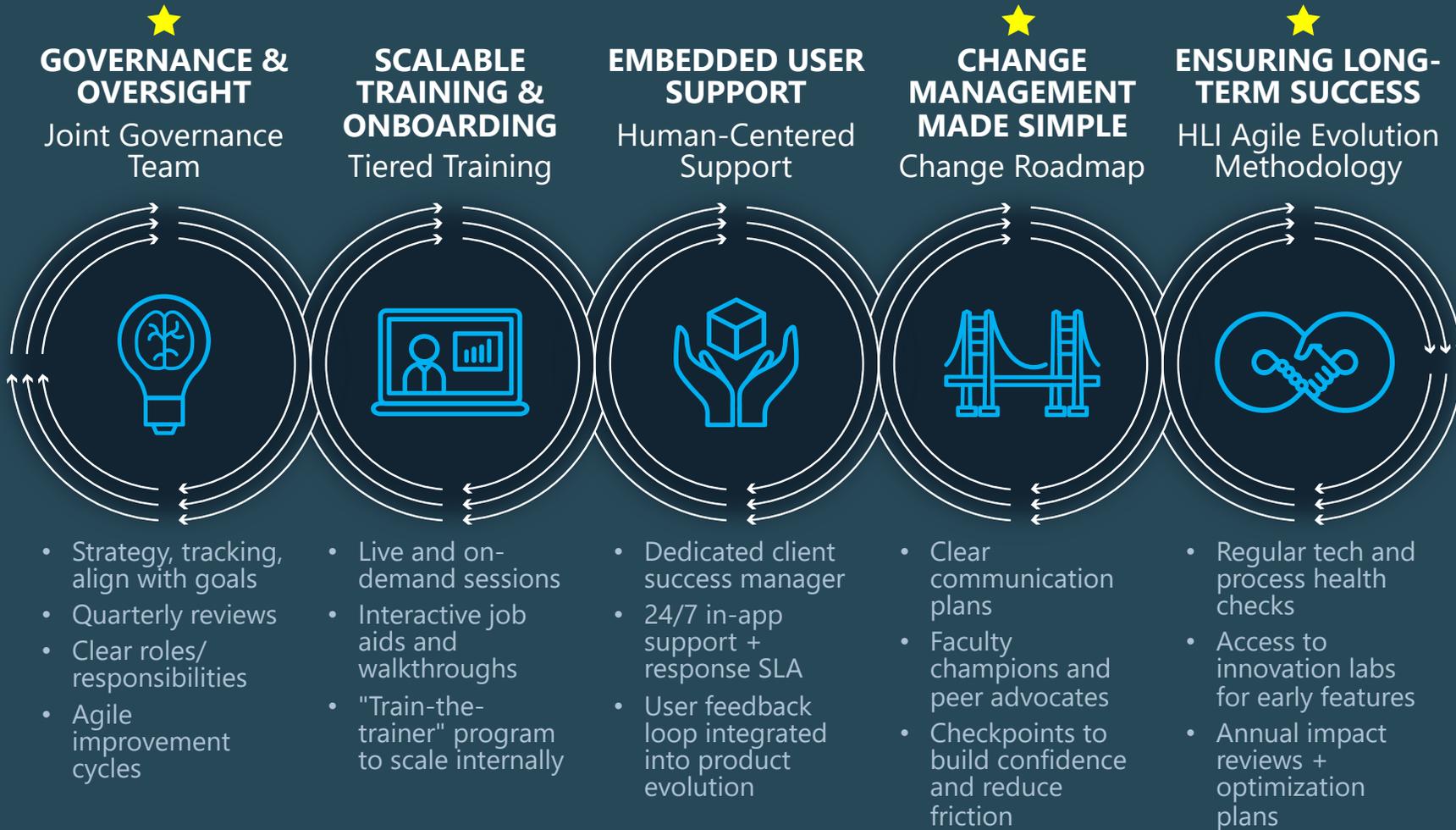
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QUESTIONS & ANSWERS

“

HLI DEVELOPS COURSES FASTER, LOWERS COST, and INCREASES QUALITY with Advance's easy to use, future-proof R.A.C.E. L&D automation solution.

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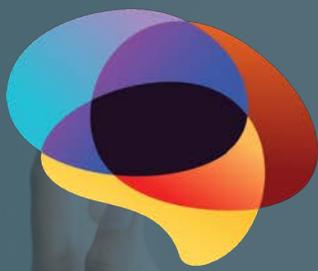
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Modify as Needed



24 HOUR COMPANY

DESIGN TO WIN

Mike Parkinson

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HAPPY TO HELP!
WINNING ORALS
COACHING,
SOLUTIONING, AND
GRAPHICS SUPPORT



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