



The Intrepid Word Traveler—

Tips to Help You Navigate an RFP and Reach the Other Side

Melissa Mabon

March 22, 2018



Part 1: *Word Tips to Navigate RFPs*

- Flag instructions & Requirements
- Reusing Proposal Content SAFELY
- Managing Reviews using Comments
- Avoid PDF pitfalls



Part 2: Cool Word Tool



GOTO Live Demo



RFP Examiner Demo



How to Get the RFP Examiner

www.expediencesoftware.com/apmp-offer

Username: APMP18

Password: EXPEDIENCEAPMP18

[GOTO Install Instructions](#)



Flag instructions & Requirements

- Why Use Highlight to Mark an RFP
 - If you don't want to use a shredding tool
 - You want to analyze the RFP directly
 - You can take several passes



Flag instructions & Requirements

- Typical Process
 - Mark Red Flags
 - Mark Instructions
 - Mark SME requirements

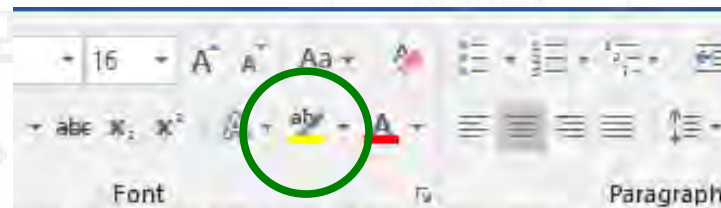


Flag instructions & Requirements

- Highlight Shortcut Tips

- Set Default Highlight Color

Ctrl+ Alt + H



INVITATION FOR BID (IFB)
Bid Number: 015-103
itorial, Repairs and Maintenance”
ATTN: Michelle Smith
Department of State Hospitals
erience of the Offeror and Key Pers



Flag instructions & Requirements

• Find & Replace to Highlight Key Terms

- Enter term in **FIND** box
- *More* → *Format* → *Highlight* in **REPLACE** box

Capacity and Ex...

1. Provide b
2. Provide a
have serviced
and the numb

Key Personnel

1. Include a
Provide resum

Method of Appro...

1. Provide a
and/or repair s
2. Provide a
Cleaning Serv
3. Provide y
qualifications
demonstrate experience, knowledge, and competency.

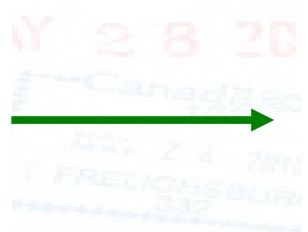


Flag instructions & Requirements

- **Export Method 1: Direct Copy/Paste**
 - **Ctrl + Select** to select non-contiguous
 - **Ctrl + C** to copy all selected text
 - **Ctrl + V** to paste into Word or Excel

INVITATION FOR BID (IFB)
Bid Number: 015-103
“Janitorial, Repairs and Maintenance”
ATTN: Michelle Smith
Department of State Hospitals

Ctrl + C



Bid Number: 015-103
Janitorial, Repairs and Maintenance
Michelle Smith
Department of State Hospitals

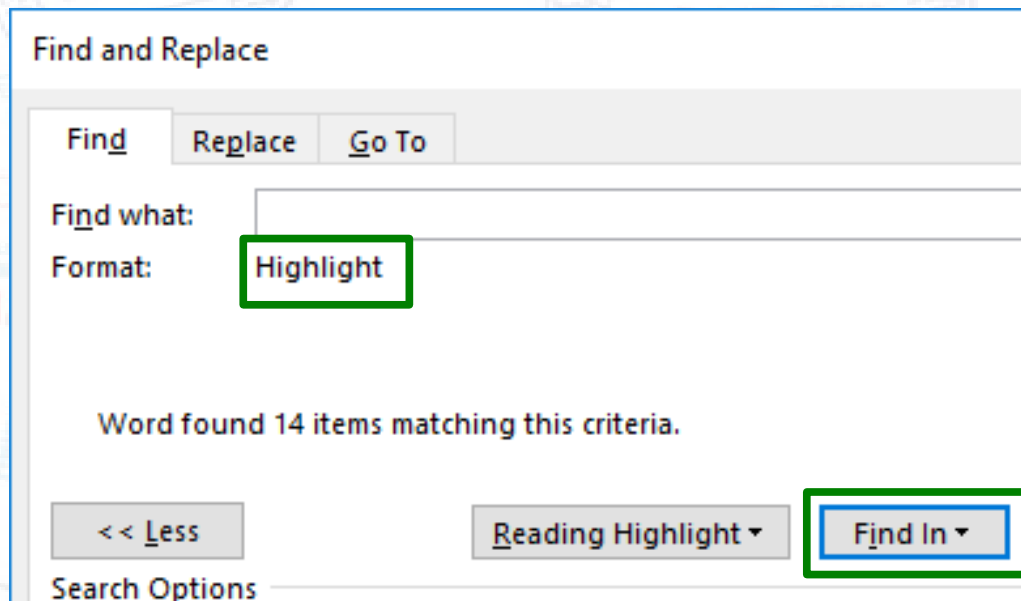
Ctrl + V



Flag instructions & Requirements

• Export Method 2: Find All Highlight

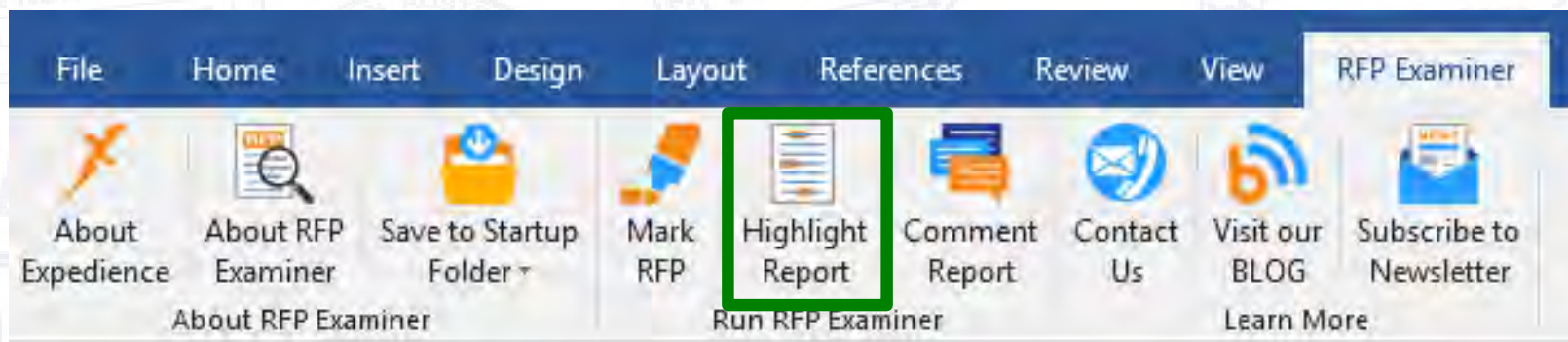
1. In **FIND** box: *More* → *Format* → *Highlight*.
2. (This will select all highlight, doesn't let you pick color)
3. Click **Find All**
4. **Close** Find Dialog
5. **Ctrl + C** to Copy
6. **Ctrl + V** to Paste





Flag instructions & Requirements

- Export Method 3: RFP Examiner





Leave no Trace Behind

- How do you make sure you never leave the wrong company name in a proposal?
 - Never, ever reuse proposal content
 - Use Find & Replace to look for possible names
 - Read the proposal again, carefully



Leave no Trace Behind

- Better Approach: Prepare Boilerplate
 - Take time to insert standardized placeholders
 - Use something to delimit placeholders, like [brackets]
 - Use something not in content, and be consistent
 - Use Wildcard Search & Highlight to find the placeholders

TechThink Consulting Services LLC has prepared the following proposal in response to [CLIENT NAME LONG] for [SOLUTION NAME]. We have tried to remain as brief as possible in this proposal while providing all the pertinent details to allow [CLIENT NAME SHORT] to best understand:



Leave no Trace Behind

- Find & Highlight all Placeholders
 - Turn on **Wildcards**
 - **Find:** \[*\] (use forward slash in front of brackets +
 - **Replace More** → **Format** → **Highlight**
 - Run **Replace All** to quickly view all placeholders

TechThink Consulting Services LLC (TechThink) has prepared the following proposal in response to [CLIENT NAME LONG] for [SOLUTION NAME]. We have tried to remain as brief as possible in this proposal while providing all the pertinent details to allow [CLIENT NAME SHORT] to best understand:



Leave no Trace Behind

- Replace Placeholders & Remove Highlight
 - Turn **OFF Wildcards**
 - **Find** specific Placeholder
 - **Replace** with specific name & **Not-Highlight***

TechThink Consulting Services LLC (TechThink) has prepared the following proposal in response to **BigCo Corporation** for Important Opportunity. We have prepared this proposal while providing you the opportunity to understand:

► Scope, estimate
proposal

Find and Replace

Find Replace Go To

Find what: [CLIENT NAME SHORT]

Format: [dropdown]

Replace with: BigCo

Format: Not Highlight

**Select highlight twice to set to NOT highlight.*



Use Comments to Keep Everyone on the Same Path

- **Advantages of Comments in Review Process**
 - Can use both desktop and online versions of word
 - Can track multiple inputs simultaneously
 - Can create comment chains
- **Disadvantages of Comments**
 - No easy way to export or collect comments
 - Will look at 3 Methods to export comments



Export Comments 1 – Copy/Paste

• Method 1: Copy & Paste Comments

- Show Comments
- Insert Cursor
- Shift+ Ctrl+ End
Selects All Comments
- Ctrl + C & Ctrl + V
*Pastes all comments
but w/out details*

Think) has prepared the Corporation for BigCo Solution.

ible in this proposal while

w BigCo to best understand:

tal estimated price of the

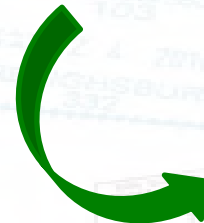
nsure BigCo Corporation success suite deployed globally, oving from on-premise SAP

MM Melissa Mabon 32 minutes ago
Is this necessary? Seems gratuitous.

[Reply](#)

MM Melissa Mabon 29 minutes ago
This should be more specific.

[Reply](#)



Is this necessary? Seems gratuitous.

This should be more specific.

Redundant.

Need additional detail from engineering here.



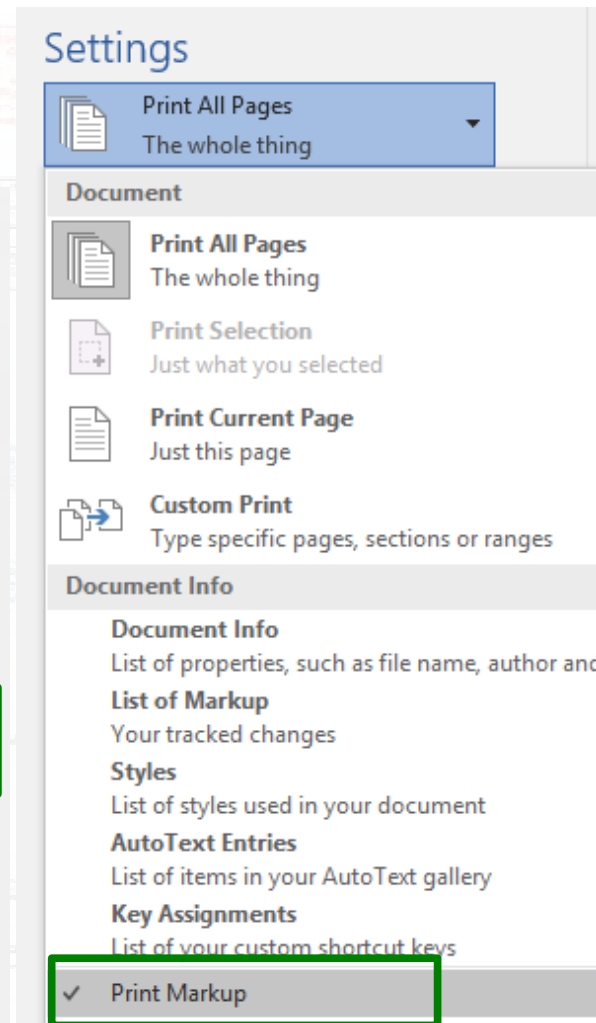
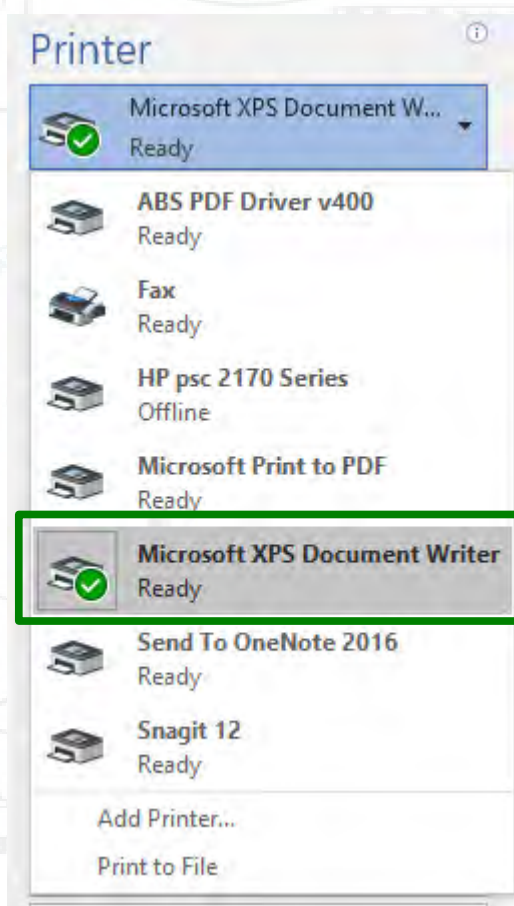
Export Comments 2 - XPS

- Method 2: Print to XPS file

(XML Paper Specification)

- Select **Print Mark-up**
- Print to **XPS file***

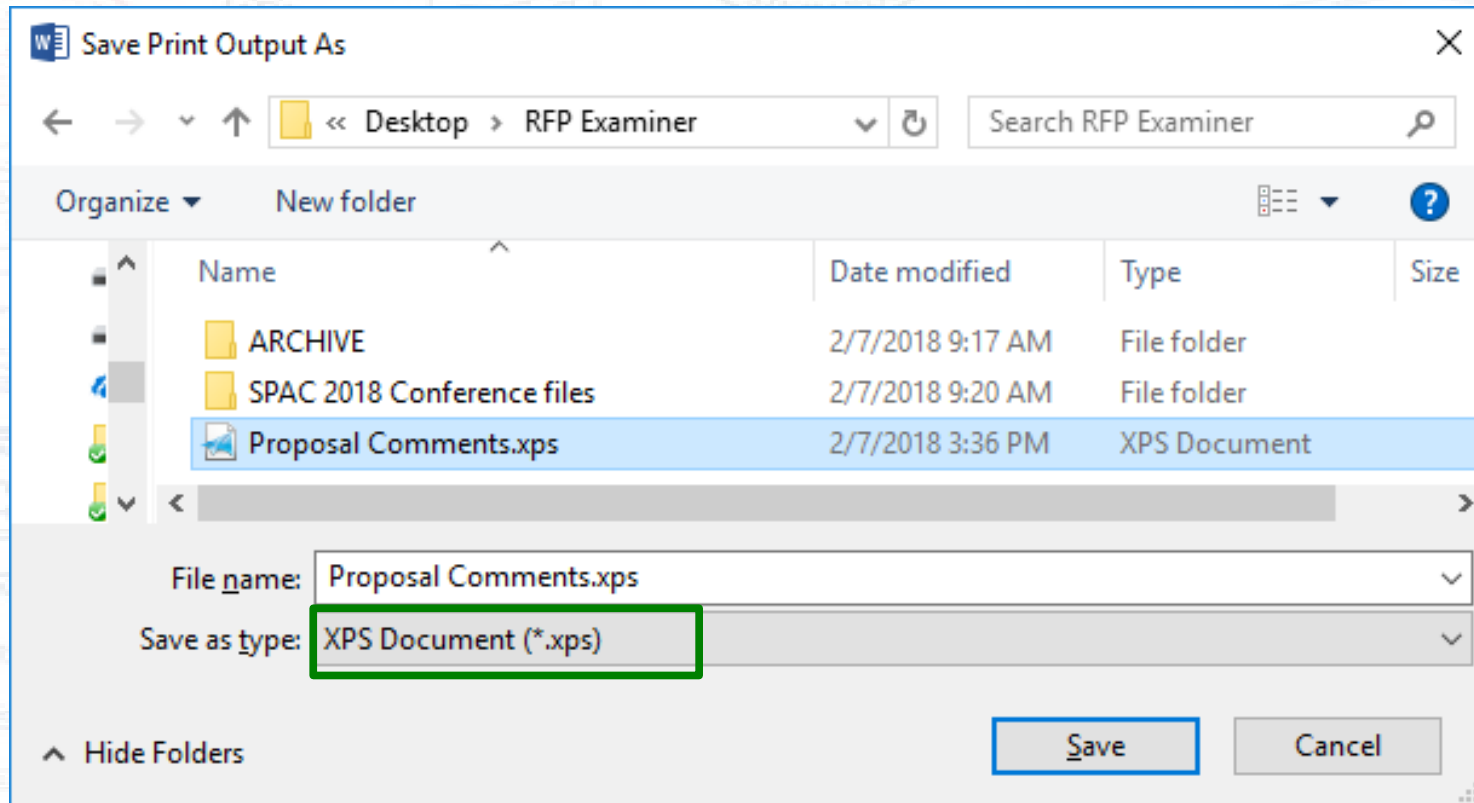
**Select ONLY XPS Document Writer*





Export Comments 2 - XPS

- Select .XPS File Type





Export Comments 2- XPS

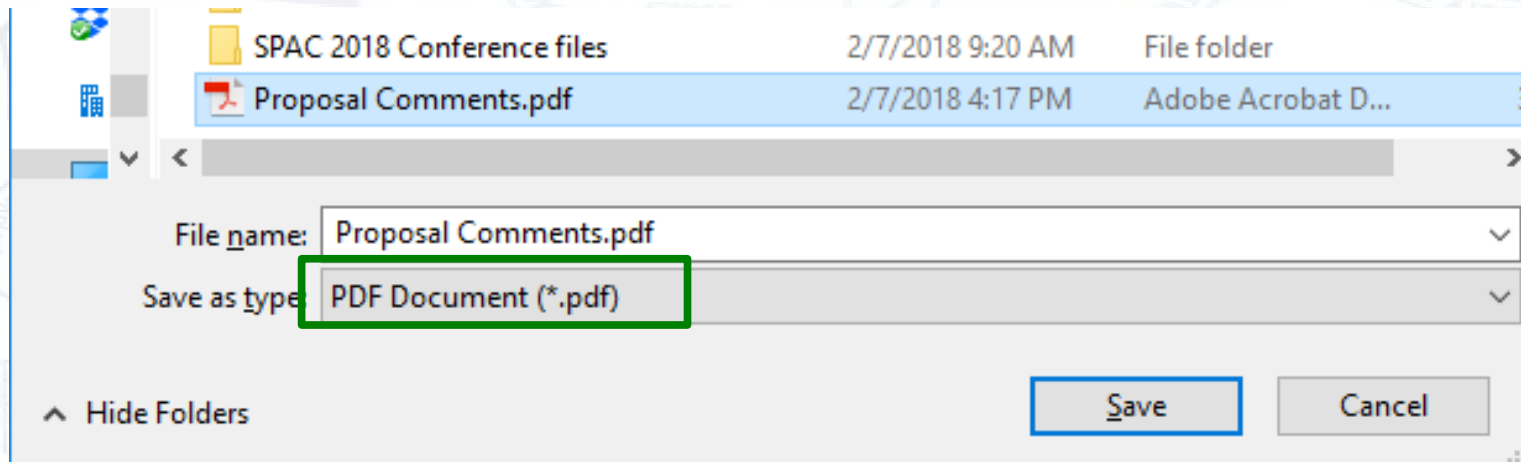
- Open XPS Viewer
 - Double click **.xps** file to open XPS Viewer
Cannot select/copy or save as document

Main document changes and comments		
Page 1: Commented [MM1]	Melissa Mabon	7/02/2018 2:50:00 PM
Is this necessary? Seems gratuitous.		
Page 1: Commented [MM2]	Melissa Mabon	7/02/2018 2:53:00 PM
This should be more specific.		
Page 1: Commented [MM3]	Melissa Mabon	7/02/2018 2:52:00 PM
Redundant.		
Page 1: Commented [MM4]	Melissa Mabon	7/02/2018 2:51:00 PM
Need additional detail from engineering here.		



Export Comments - XPS

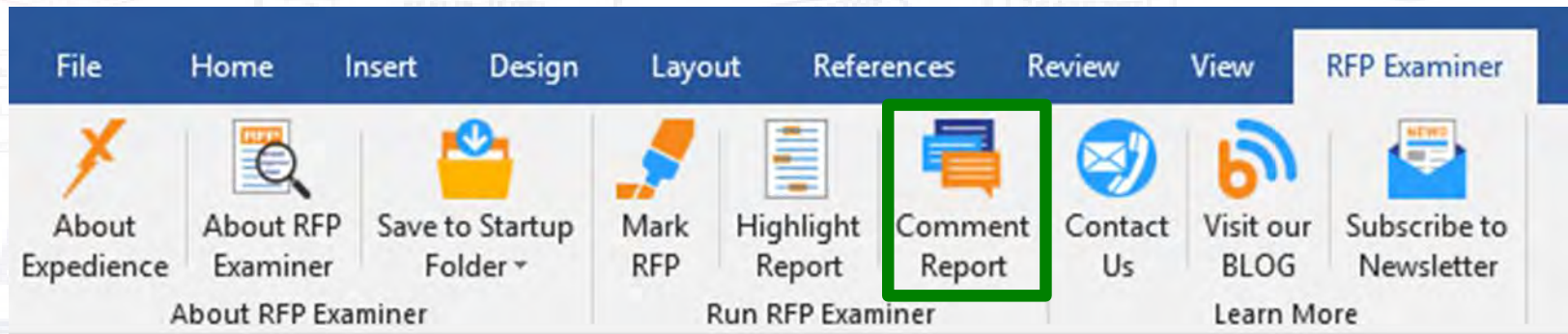
- Method 2: Save XPS as PDF
 - Double click **.xps** file to open XPS Viewer
Cannot select/copy or save as document
 - Print to PDF
 - Open **PDF** and **copy contents** as desired





Export Comments

- Method 3: RFP Examiner





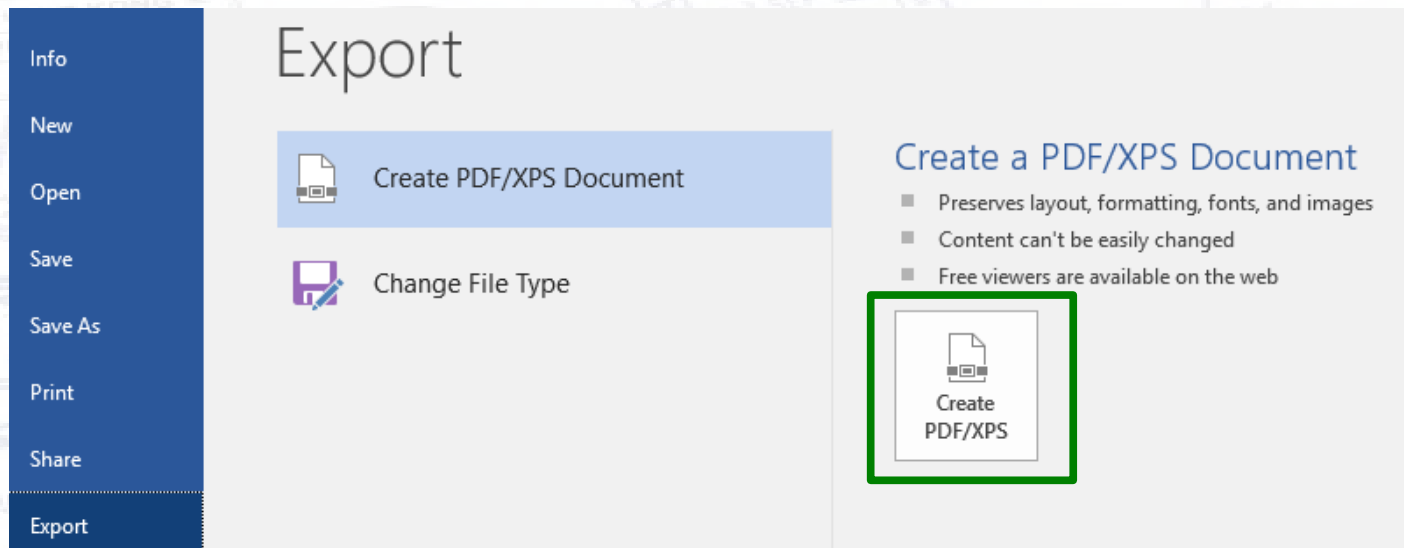
Word/PDF Shortcuts & Pitfalls

- **NEW PDF-to-Word Conversion in 2013**
 - *Right click and open with Word or open from Word*
- **Conversion Issues**
 - Word applies standard built-in styles (Normal, Heading 1,...)
 - Sets the definitions to match the PDF formatting
 - **Advantage:** You can fix by updating style definition.
 - **Caution:** Can affect the formatting of boilerplate



PDF Shortcuts & Pitfalls

- How to use Word to Convert to PDF
- *File* → *Export* → *Create PDF*

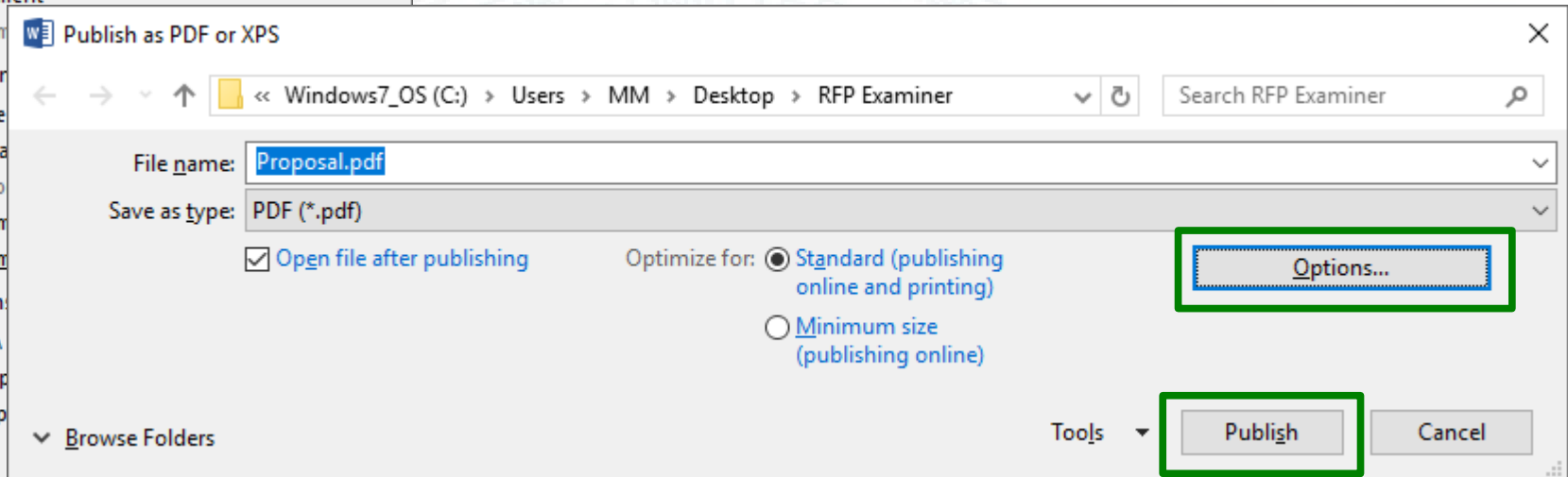
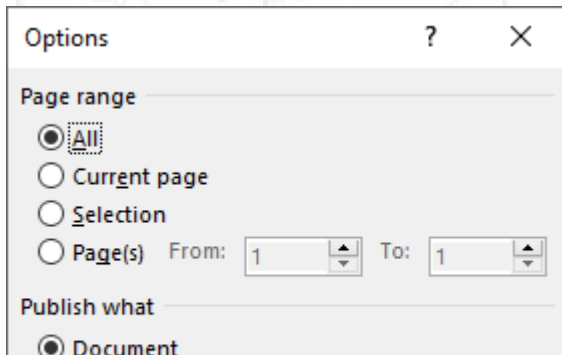




PDF Shortcuts & Pitfalls

• How to Use Word to Convert to PDF

- *Set Options*
- *Click 'Publish'*

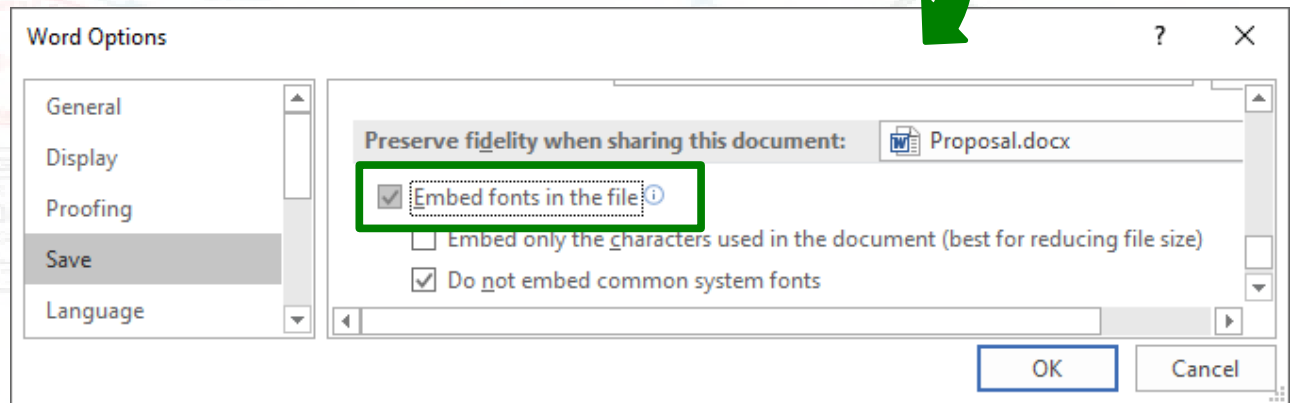
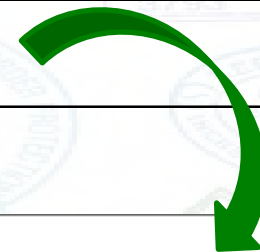




PDF Shortcuts & Pitfalls

- Problems when Converting to PDF

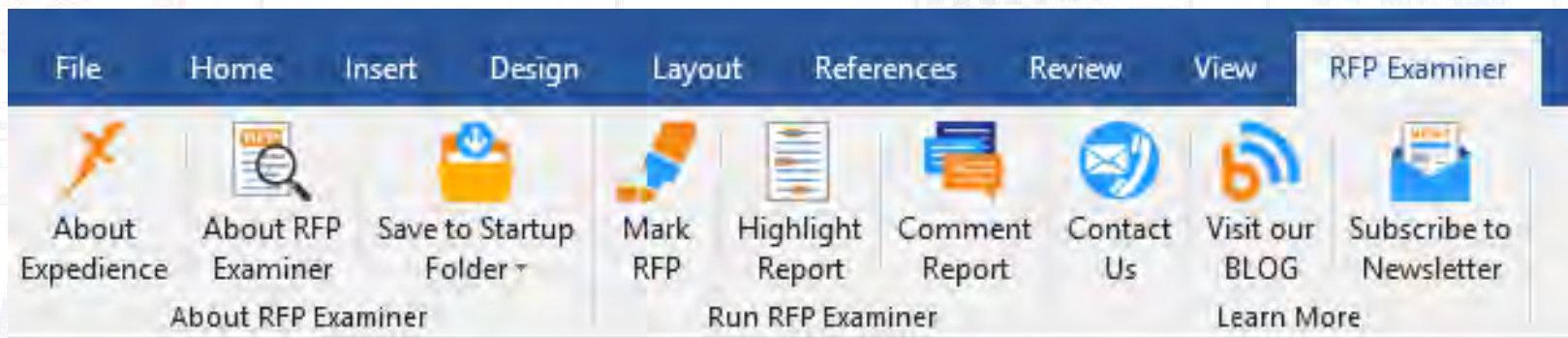
Problem	Solution
Some formatting is not retained	Possibly due too many layers of formatting applied. Remove formatting (eraser) and reformat
Complex images get repositioned	Group images made of multiple parts Convert to INLINE positioning
Fonts appear differently on different computers	Set Word Save option to embed fonts





RFP EXAMINER DEMO

• Overview

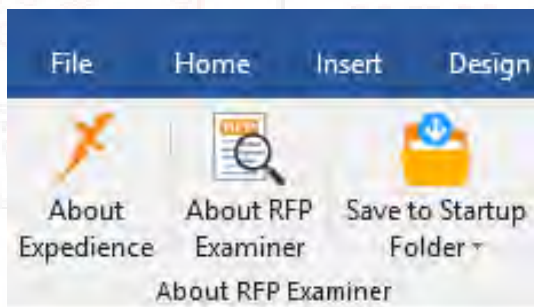


- Word Add-in (*‘.dotm file’*)
- Available as free download to SPAC ‘18 attendees

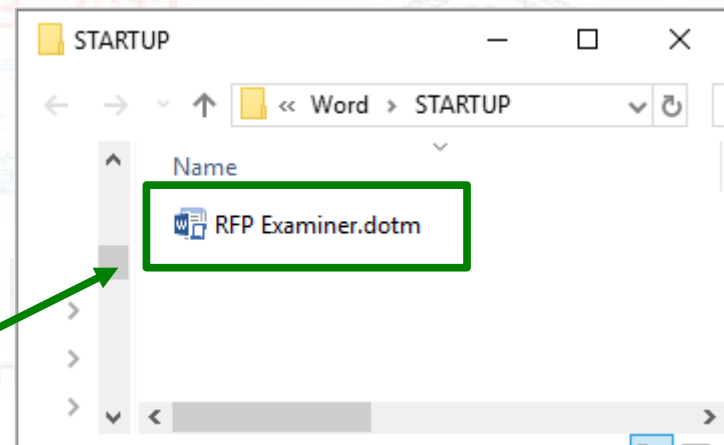
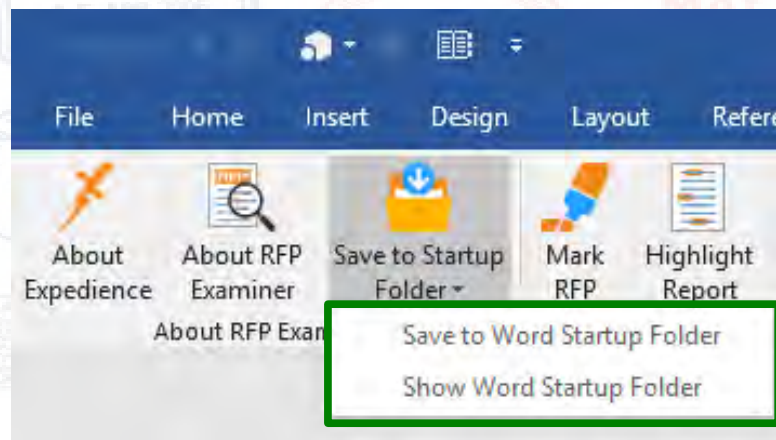


RFP EXAMINER DEMO

- About RFP Examiner



- About Expedience
- About RFP Examiner
(Link to Online Help)
- Save to Startup Folder
(Open automatically)





RFP EXAMINER DEMO

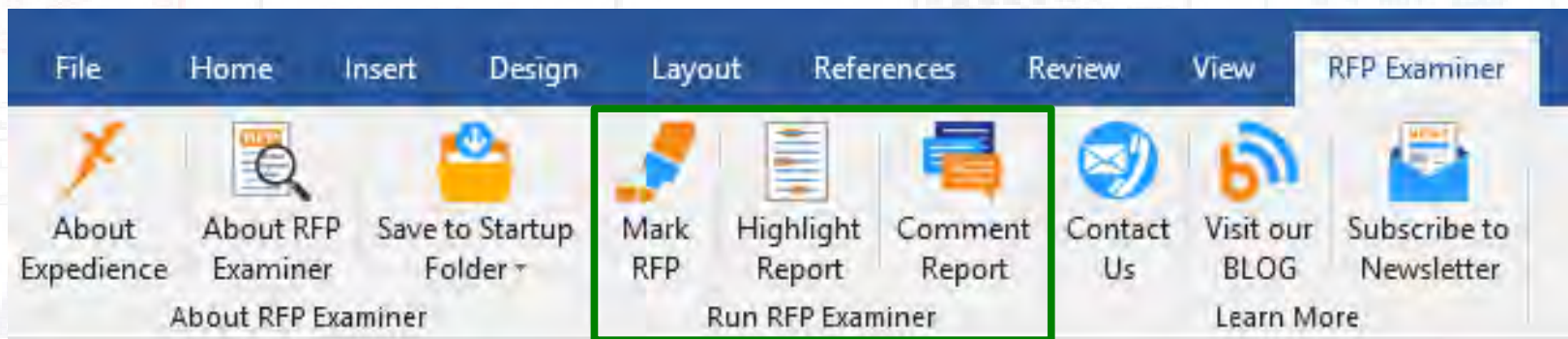
- Learn More
 - Contact Us
 - Expedience BLOG
 - Expedience Newsletter





RFP EXAMINER DEMO

- Tools Overview

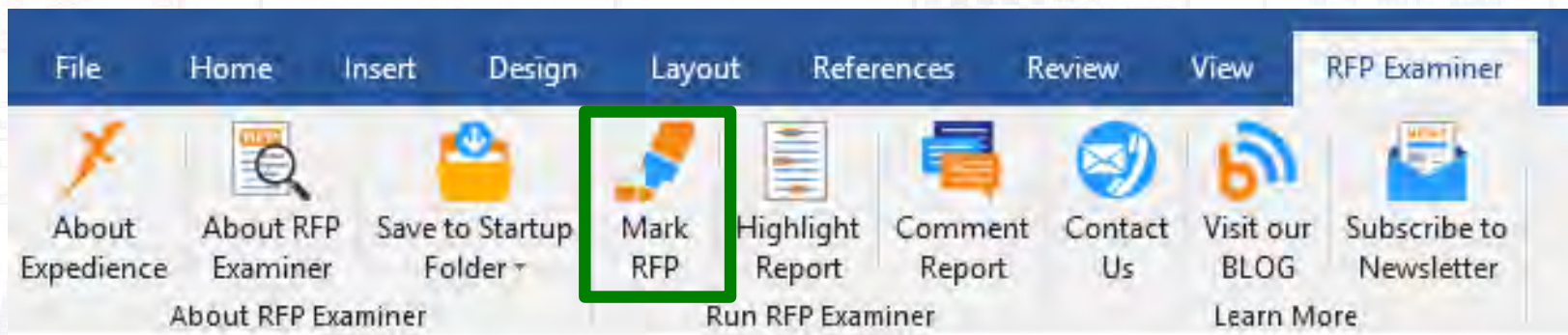


- 3 Tools in the Middle of Ribbon



RFP Examiner Demo

- Mark RFP



- Keeps a list of frequently used terms to highlight
- Select terms to highlight
- Select color for highlight



RFP Examiner Demo

• Mark RFP

- Save frequently used terms
- Check terms to highlight
- Select highlight color
- Click **'Mark'**

Mark RFP

Search Terms:

- comply
- provide
- describe
- [Client Full Name]
- [Client Short Name]

Highlight:

Double click list to select all.



RFP Examiner Demo

- Mark RFP

ATTN: Michelle Smith
Department of State Hospitals

1. Capacity and Experience of the Offeror and Key Personnel:

- 1.1. Provide background information on the offeror and all key personnel who have serviced. Include the names of the offeror and the number of years of experience.
- 1.2. Provide a description of the offeror's experience and the number of years of experience.

2. Key Personnel

- 2.1. Include a worklist of key personnel. Provide resumes for all key personnel.

3. Method of Approach:

- 3.1. Provide a description of the offeror's method of approach and/or repair services.
- 3.2. Provide an overview of the offeror's Cleaning Services.
- 3.3. Provide your method of approach to ensure personnel qualifications meet the requirements of this contract and demonstrate experience, knowledge, and competency.

Mark RFP

Search Terms:

comply
 provide
 describe
 [Client Full Name]
 [Client Short Name]

Highlight:
Brt Green

Mark

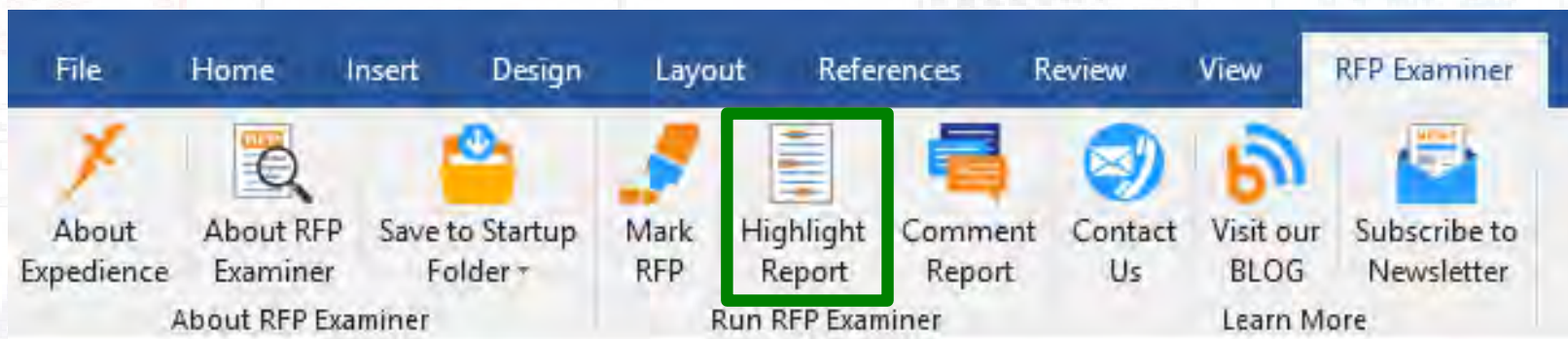
Close

Double click list to select all.



RFP Examiner Demo

- Highlight Report

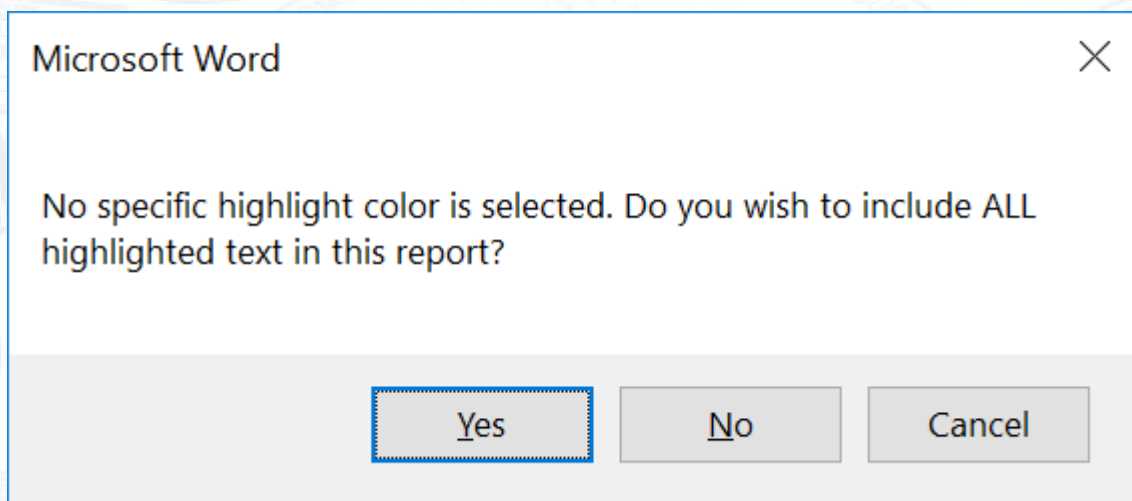


- Creates a table in MS Word
- Export all or just one selected highlight color
- Captures context and page number



RFP Examiner Demo

- ONE Color or ALL Colors
 - Place cursor inside highlight to export JUST that color
 - OR, place cursor outside highlight to be prompted to export ALL





RFP Examiner Demo

• Highlight Report

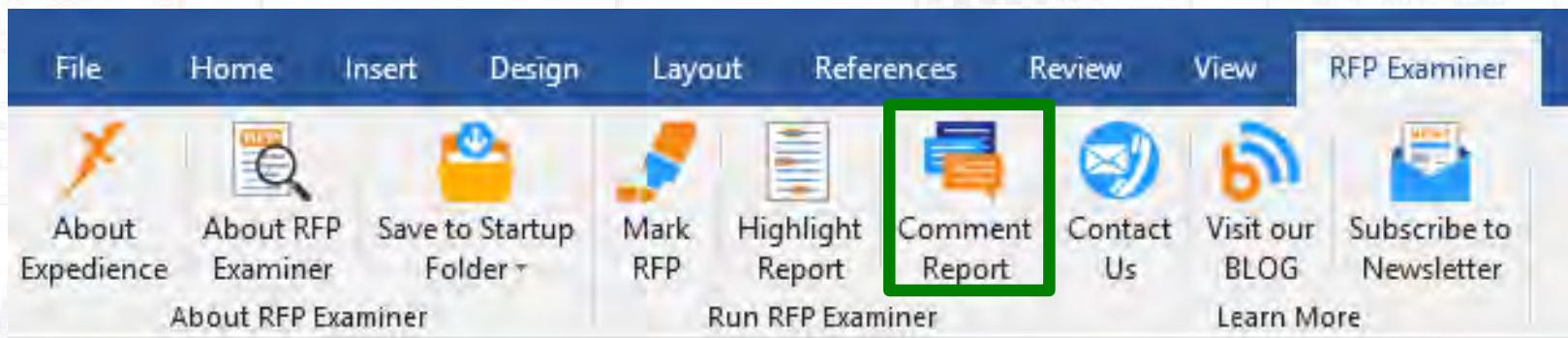
REPORT FOR HIGHLIGHTED TEXT IN 'MARKED Bid Number 15-103 - Janitorial and Repair.docx'

#	ITEM	PG.LN	NOTES
	INVITATION FOR BID (IFB) Bid Number: 015-103	1.02	
	"Janitorial, Repairs and Maintenance"	1.03	
	ATTN: Michelle Smith Department of State Hospitals	1.04	
	ATTN: Michelle Smith Department of State Hospitals	1.05	
1.1.	Provide background information about the organization.	1.08	
1.2.	Provide a description of 3 accounts you currently service or have serviced. Include services actually provided, Name of the account and the number of years services were provided.	1.09	
2.1.	Include a workload chart covering the term of this contract.	1.14	
	Provide resumes for Supervisor and a second key personnel	1.15	
	Provide resumes for Supervisor and a second key personnel	1.15	
3.1.	Provide a description of your onsite preventive maintenance and/or repair services of mechanical and electrical systems	1.18	
3.2.	Provide an overview of your Floor Cleaning and Window Cleaning Services	1.20	



RFP EXAMINER DEMO

- Comments Report



- Creates a table in MS Word
- Export all comments from document
- Captures context and page number



RFP Examiner Demo

• Comments Report

REPORT FOR COMMENTS IN 'Document5'

#	ITEM	PG	AUTHOR	DATE	COMMENT
	Lorem ipsum dolor sit amet, consectetur adipiscing elit.	1	Melissa Mabon	1/29/2018 5:10:00 PM	Check with Legal
	Proin nec augue. Quisque aliquam tempor magna. Pellentesque	3	Melissa Mabon	1/29/2018 5:11:00 PM	Rephrase this
	In in nunc. Class aptent taciti sociosqu ad litora torquent per conubia nostra, per inceptos	8	Melissa Mabon	1/29/2018 5:11:00 PM	This should be in Greek.
	Lorem ipsum dolor sit amet, consectetur adipiscing elit.	12	Melissa Mabon	1/29/2018 5:10:00 PM	Check with Legal
	Proin nec augue. Quisque aliquam tempor magna. Pellentesque	21	Melissa Mabon	1/29/2018 5:11:00 PM	Rephrase this
	In in nunc. Class aptent taciti sociosqu <u>ad</u> litora torquent per conubia nostra, per inceptos	22	Melissa Mabon	1/29/2018 5:11:00 PM	This should be in Greek.
	Lorem ipsum dolor sit amet, consectetur adipiscing elit.	23	Melissa Mabon	1/29/2018 5:10:00 PM	Check with Legal
	Proin nec augue. Quisque aliquam tempor magna. Pellentesque	24	Melissa Mabon	1/29/2018 5:11:00 PM	Rephrase this
	In in nunc. Class aptent taciti sociosqu <u>ad</u> litora torquent per conubia nostra, per inceptos	25	Melissa Mabon	1/29/2018 5:11:00 PM	This should be in Greek.
	Lorem ipsum dolor sit amet, consectetur adipiscing elit.	26	Melissa Mabon	1/29/2018 5:10:00 PM	Check with Legal



RFP Examiner Demo



How to Get the RFP Examiner

www.expediencesoftware.com/apmp-offer

Username: APMP18

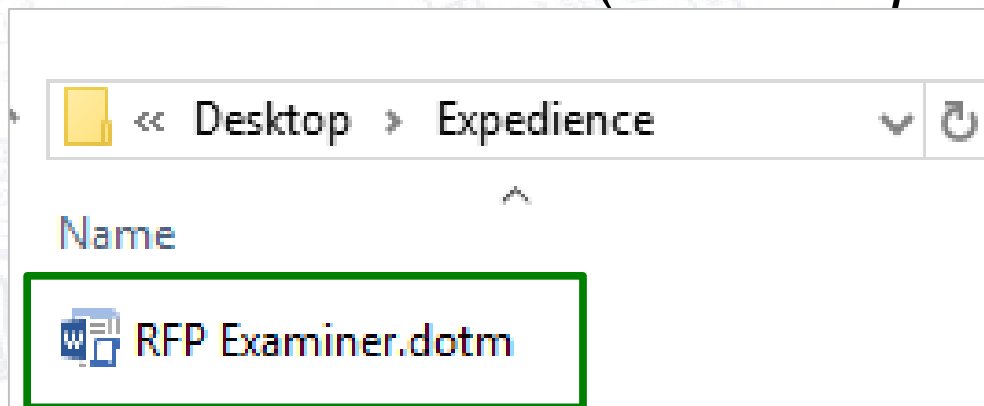
Password: EXPEDIENCEAPMP18



RFP Examiner Demo

• How to Install

- You will receive an email with the Tool and instructions
- Download files to local folder (*do NOT open from email*)

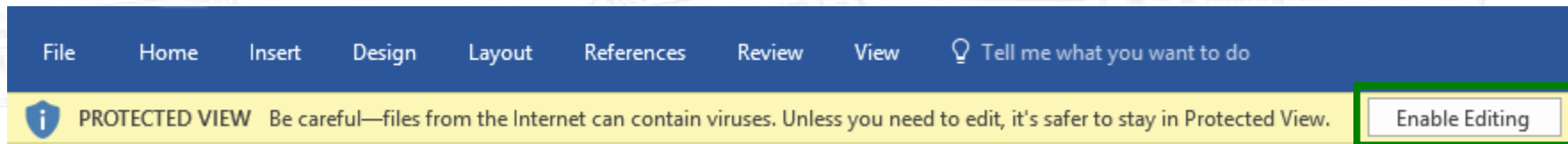


- Open the tool (*.dotm file*) like any file
 - *Open through MS Word*
 - *Double click file in Windows Explorer*

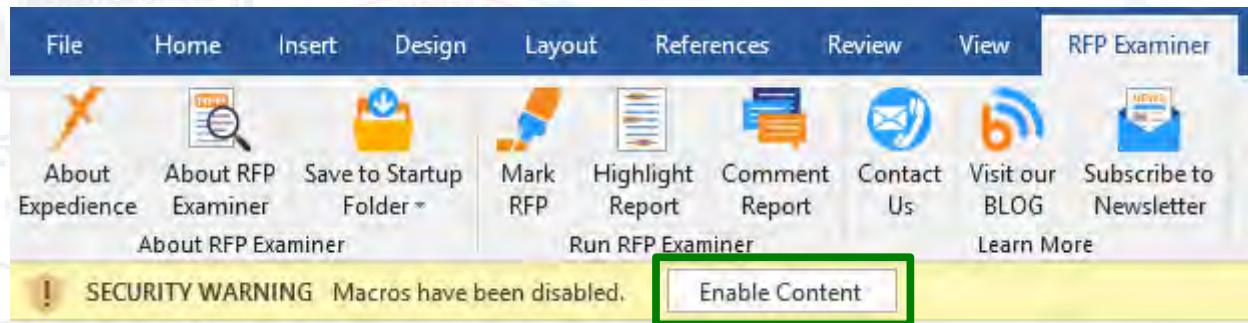


RFP Examiner Demo

- Probable Security Warnings
 - Accept Internet download warning



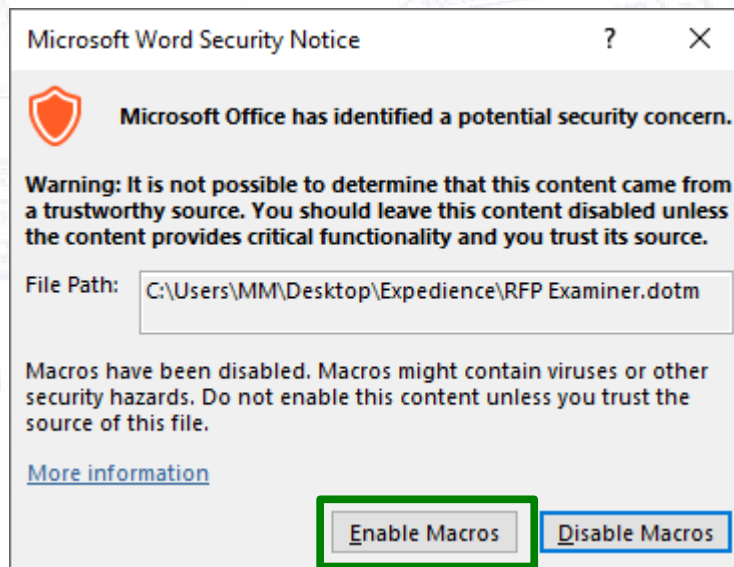
- Accept 'Enable Content' message.





RFP Examiner Demo

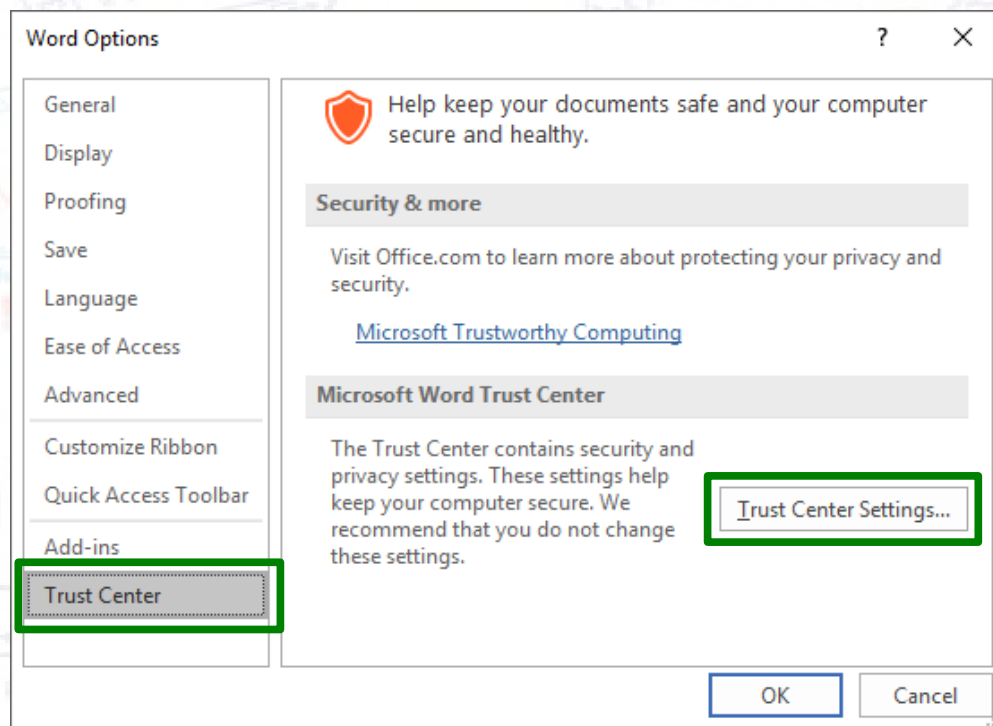
- Possible but less common Security Warning
 - Accept 'Enable Macros' message





RFP Examiner Demo

- If the Tool Does NOT Appear:
 - You may need to set folder as trusted location
 - GO TO File →
 - Options →
 - Trust Center →
 - Trust Center Settings

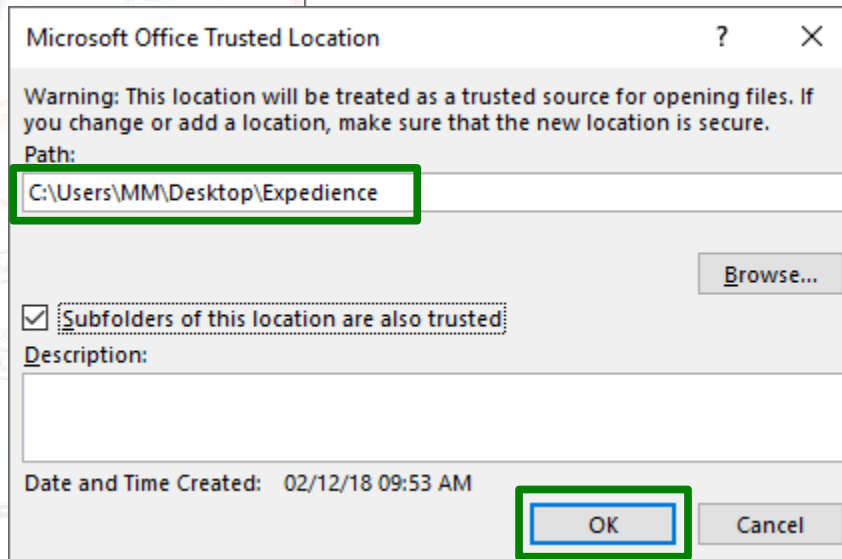
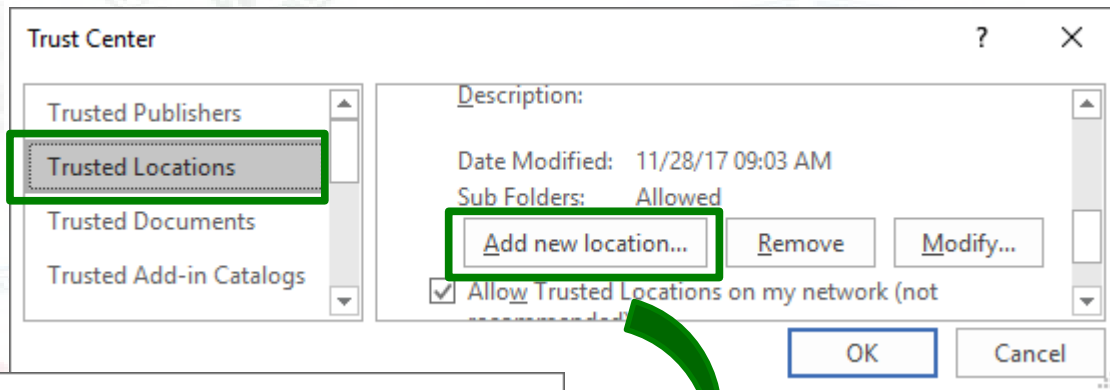




RFP Examiner Demo

- Set Folder as TRUSTED:

- Trusted Locations →
- Add new location...
- Browse for folder that contains tool
- Click OK





THANK YOU!

- Questions

