hobs repro

Automation

Changing the state of play

Auto Q

Introduction

When bids and proposals are being prepared, the clock is always against the team. The information is generally coming from multiple sources and there are various points of view from stakeholders. In combination, this invariably results in a last-minute, high pressure business-critical function.

With our technology and services, we can improve this process. We can provide more time and manage change with automation that delivers the highest quality designed document; even when time has run short.

When preparing bid or proposal documents, most teams will use Microsoft Word for authoring and, where a graphics package is used, Adobe InDesign.

MS Word is an excellent authoring tool with wide appeal, but it is not the best tool for creating differentiated documents that look great, either in electronic or paper form. InDesign is the preferred tool for this task but it is unrealistic to expect those authoring to be licensed with this technology and trained in its use.

InDesign, in the right hands, can deliver high- quality documents, but this requires content to be converted from the Word document into InDesign, which takes a vast amount of time. So, given

that timings are critical, users default to creating an average Word document.

Most clients do not want to compromise on the quality of documents for such a critical function as winning business. Our bids and proposals team have been amongst clients whilst under pressure to output top priority documents at the very end of the process.

To create more time and make last-minute changes possible, we have developed a range of technologies which allows teams to take a Word document through an automated process which effortlessly flows into InDesign, facilitating a polished, professional looking document.

Hobs have two automation solutions; one for teams that need to work exclusively in Word and the other for those who wish to take advantage of the higher quality documents that InDesign can produce, without having to use it themselves.

Auto Q

AutoQ quickly produces documents of annual report quality that are 100% on-brand in just a matter of minutes. By automating the design elements of the process AutoQ saves up to 95% of time compared to manual processes

1 – It all starts with a simple Microsoft Word document. For those companies managing a large volume or high complexity of bids and proposals, we recommend using a dedicated bid or proposal automation solution such as Qvidian to generate this. Qvidian can easily be integrated with Salesforce.com and comprises the following three modules:

1 An Intelligent Content Library

Unlike SharePoint or other repositories, the content is curated with automation in mind, including feedback loops to keep content fresh.
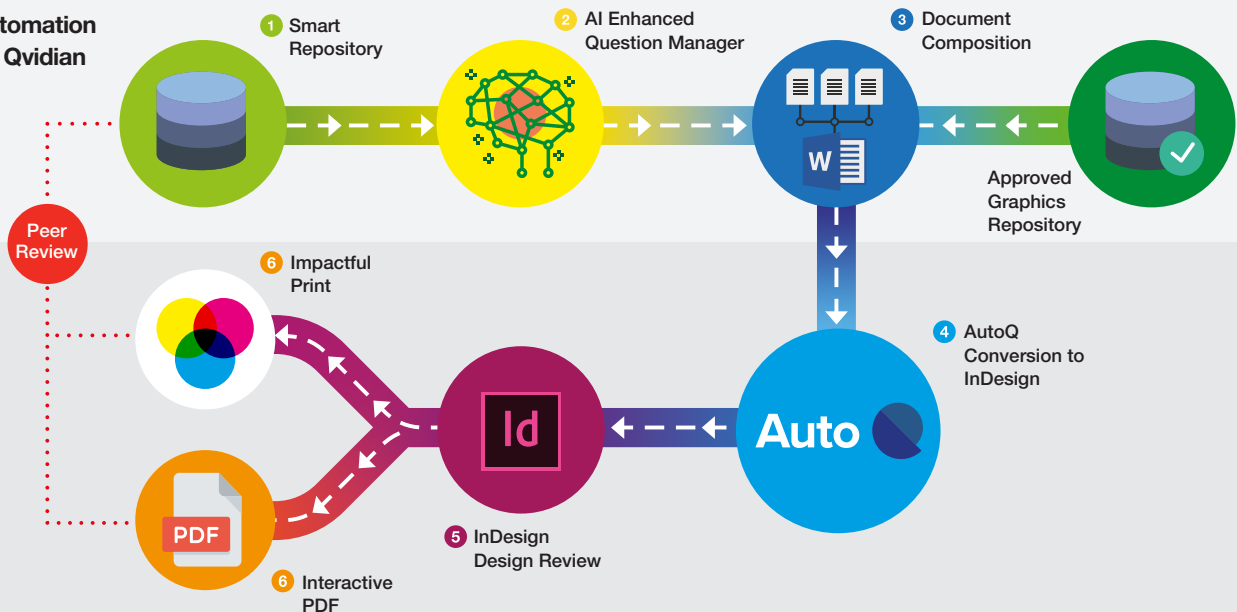
2 AI Question Management Module

This helps to manage contributions from multiple contributors, manages workflow, timelines and uses its own AI to automate the answering of questions.

3 Document Composition

This combines the contributions back into one document in MS Word format.

Proposal Automation Software eg Qvidian

1 Smart Repository

2 AI Enhanced Question Manager

3 Document Composition

Approved Graphics Repository

Peer Review

Graphics Automation

6 Impactful Print

4 AutoQ Conversion to InDesign

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Auto

5 InDesign Design Review

PDF

6 Interactive PDF

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4 AutoQ Conversion to InDesign

AutoQ robotically completes most of the transition work in converting formatted Word files to InDesign in record time.

5 InDesign Design Review

The output from AutoQ is finessed by a designer working in InDesign.

6 Digital and/or Hardcopy Finished Documents

The finalised document can be either printed by Hobs or loaded to a digital delivery platform for distribution.

Adobe InDesign Automation

Good design can have a major impact on a client's first impression of your company.

To maximise this opportunity and make the design process more efficient, we have designed technologies that give your designers the ability to speed-up the base format, allowing more time to focus on delivering a stunning proposal.

2   WordInDesign™

This technology allows MS Word Smart templates to be converted to InDesign templates, which create impactful and highly designed documents with ease.

For teams that use a manual process to create documents, we can supply a Smart Template in Word with built-in styles that are easy-to-use and key to the automation process.
The authors can then write the documents as they would normally in MS Word.

Once the proposal team receive the document, they perform a pre-design check.

This verifies the styles are correct, and determines where there is a new layout required, such as a CV section. Appropriate markers are placed *in situ.*

The document is then imported into InDesign and the WordInDesign software runs from the menu selection within InDesign.

The designer can then apply their final finishing touches to the document, ready to send back to the author as a PDF proof.

MS Word Smart Templates

For users wanting to stay completely in the Word environment, we have a solution which makes some of the higher functions of MS Word accessible to standard users. This solution allows the creation of brand compliant documents but with limited flair compared to InDesign.

3 **Quick Parts Gallery** - Partial Automation

The Quick Parts Gallery is a simple to use storage repository. Manually choose what document features you need and they will be automatically added into the document.

Quick Parts Gallery functions as a clipboard, but it is a user-modifiable gallery. A variety of content can be saved by the user to this gallery for later access. The main advantage is that saved content is portable with the document. Items can be used over and over again and all kinds of content can be saved e.g. text, tables, charts, diagrams, page layouts, and so on.

Hobs can set up Quick Parts items to suit the look, feel and requirements of a specific project template. Our extensive experience in template design and construction means that we can populate the Quick Parts Gallery placing useful content at the fingertips of all template users.

4 **Templates+** High Automation

Our Templates + solution brings automation to the next level. Using the Quick Parts Gallery, manually choose what document features you want.

Once they are added into the document, each item has various triggers which can run macro functionality. For example, pictures can automatically be placed, scaled and cropped. By adding functionality to your template, we can make base formatting easier and quicker for the proposal team.

The most commonly used tasks can also be accessed via a menu key that allows quick and easy formatting of a document.

5   **DocBuilder** - Full Automation

This is the highest level of standalone document automation we offer. Our design team can create 'smart' templates incorporating customised, menu-driven functionality which allows users to set up and adjust document layout automatically.

Laborious or repetitive tasks can be applied instantly and effortlessly at the mere click of a button.

Our smart templates offer a certain amount of guidance directly to the user by means of text prompts, avoiding any confusion or delay.

The amount of template automation will depend on the requirements of the project and the client's needs and can be discussed in detail with one of our representatives.

	Quick Parts Gallery	Templates+	Doc Builder
Adjusting document page / spread layouts			✔
Autoformatting Tables			✔
Central document Colour Scheme adjustment			✔
Autoformatting tables to column page width & format			✔
CV layout	✔	✔	✔
Case study layout	✔	✔	✔
Divider pages	✔	✔	✔
Infographics			✔ *limited application*
Logos & Graphics (placed, scaled and cropped)		✔	✔
Centralised document text updates		✔	✔
Table of Contents	✔ *Word standard*	✔ *Word standard*	✔ *automatically placed*

Conclusion

The benefits to bid teams utilising the solutions outlined above are immense. Timescales are dramatically reduced, efficiencies enhanced and the quality of the documents produced increased.

Save time

Time is valuable. Qvidian is proven to deliver a 40% increase in productivity with RFP response times reduced by 30%.[1] In terms of design, on average, it takes 15-25 minutes to manually design a single page. With our automation software, a typical 25-page document can be created in InDesign in just five minutes.[2] Automating the process eliminates all manual design work and allows designers to focus on simply finessing the document.

Reduce pressure

Preparing any bid or proposal document is stressful especially when your processes are manual. With 25% of UK workers struggling to be as productive when experiencing stress, it's essential to keep pressure to a minimum.[3] Automation software helps to ensure that all the documents needed for a proposal are prepared well before the client's deadline. This in turn reduces the pressure on your team and increases productivity.

Delivering digital transformation to the proposal process

It's simple. Automating the end-to-end proposal process transforms the state of play. Qvidian is proven to increase win rates by 28%.[4] Automating the design elements of the process ensures 90-95% of time is saved compared to manual processes.[5] Used in combination, these systems vastly enhance the quality of your proposals.

Automate the production of documents to 'annual report' quality

With our solution, you won't need to compromise on document quality. Our InDesign range enables teams to automate the production of polished, professionally designed documents that are fit to impress and 100% on-brand. The best part is that you don't need any graphic design experience to produce amazing looking documents.

Automation enables your team to pursue more opportunities to deliver growth. If your team is interested in reducing the time it takes to produce winning documents whilst improving your win rate by 28%, get in touch: **proposal-support@hobs.com**

Delivering efficiency, innovation & design quality to the proposal process

> " **Using visuals increases the likelihood of success by 43%**
>
> *3M & The University of Minnesota*

[1] Upland Qvidian, 2019. Proposal Automation Personalized Content Engine. Available at: http://info.4qvidian.com/rs/qvidian/images/Personalized-Content-Engine.pdf

[2] Hobs Repro, 2019. AutoQ survey.

[3] Perkbox.com, 2018. The 2018 UK Workplace Stress Survey. Avaiable at: https://www.perkbox.com/uk/resources/library/interactive-the-2018-uk-workplace-stress-survey

[4] Upland Qvidian, 2019. Available at: https://uplandsoftware.com/qvidian/

[5] Hobs Repro, 2019. AutoQ survey