

How to Improve Your Knowledge Repository

An essential guide on optimizing your proposal store of knowledge to make the most of AI

Introduction

Imagine a system where every piece of valuable proposal-related content your organization has ever created is instantly available at your fingertips, whether in the form of an answer to a natural language chat query or seamlessly integrated into an AI-generated RFX response draft—that's the power of pWin.ai and its Knowledge Repository (KR).

The KR centralizes critical documents like Past Performance, RFPs, and SOWs. pWin.ai leverages this information through features like KR Chat, which generates accurate, context-aware answers to questions, eliminating time-consuming file searches. The result is faster, more reliable access to essential data, improving both decision-making and efficiency.

For draft response generation, pWin.ai pulls from your KR to automatically incorporate relevant, vetted content into proposals, reducing redundant work and ensuring each draft aligns with your organization's strengths. But pWin.ai (and other tools) still require a well managed knowledge store to work optimally.

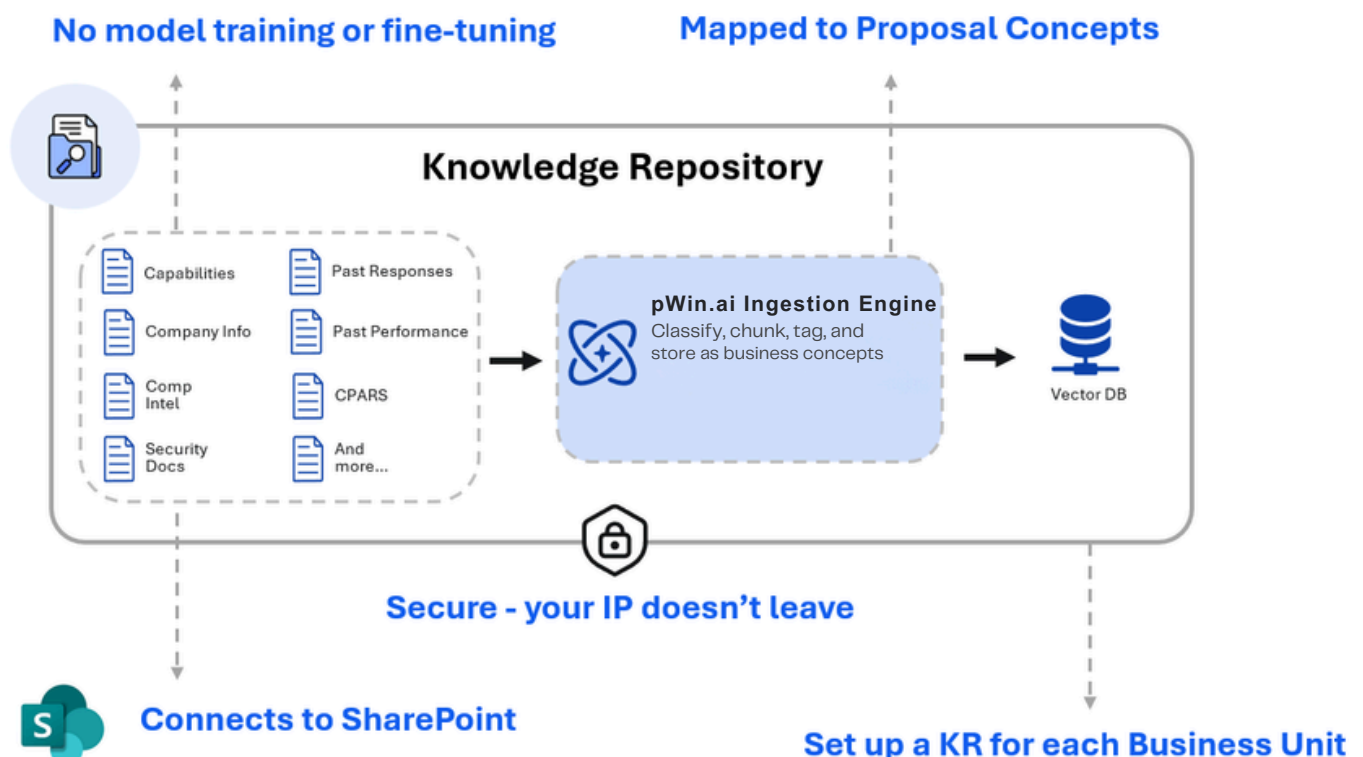


Figure 1. pWin.ai's KR ensures your best and most contextual information is retrieved for proposals

To maximize AI effectiveness, treat content management as an ongoing process and follow these tips for maintaining your KR:

1. Remove Duplicates

A good content management approach will include ongoing reviews to remove duplicates so you can ensure the use of a single, authoritative, accurate, reliable piece of content to ensure consistency and correctness, rather than different versions with variations.

Match-and-merge is a simple and effective method for minimizing duplicate information which can clutter the system and waste resources. It involves identifying similar or duplicate records (match) and then consolidating them into a single, unified record (merge).

Generative AI (GenAI) tools can help automate much of the match-and-merge process. The benefits of having a GenAI tool in the process as shown by the Gartner® research titled Quick Answer: Top 10 Uses of Generative AI in Master Data Management (March 2024) by Helen Grimster include:

- **“Automated matching rules:** Organizations can utilize GenAI to automatically generate matching rules, thus helping to speed up manual, repetitive tasks and improve deduplication. Manually tweaking and fine-tuning matching rules can require a lot of input and be time-consuming for the business. Having the application offer suggestions saves time and provides consistency.”
- **“Hybrid golden records:** Organizations can use GenAI to identify, consolidate and create hybrid records for low-scoring data matches. The derived records will meet the uniqueness and completeness criteria required to create a golden record.”

2. Add the Right New Content

Organizations are not static, they are always growing and evolving, coming up with new products, services, approaches, etc. Your KR must do the same so that you have accurate content for pWin.ai to leverage. Or maybe your KR is missing documentation (e.g. capability documentation or past performance write-ups) that is creating a gap. In either case, you need to create the appropriate content in your KR. Here are a few things you do to make the process efficient:

- Ensure each piece of content is well structured, ideally with a table of contents and clear headings, so the AI engine can easily understand it. Consider using standardized templates to ensure consistency.
- Use external AI tools like ChatGPT for general research and initial content creation. You can even use pWin.ai Chat to take the general research and infuse it with your company context. Load it into your pWin.ai KR after it is reviewed, edited, and approved by the appropriate internal subject matter expert (SME).



- With the time saved through AI-driven automation of response generation by pWin.ai, repurpose your writers' time to create additional KR content. For example, have them write missing past performance write-ups and capability documentation to boost your KR quality.
- A creative approach we've seen customers use to expand their KRs is to record and transcribe interviews with SMEs, and then after an accuracy check, upload those approved transcripts to the KR. This can be a quick way to create additional capability or solution documentation.
- Don't forget to save each submitted proposal response back in your KR after submission to be used for future chats and proposals.

3. Determine When to Delete Old Content

Maintaining an accurate KR entails careful management of outdated content so that only the most relevant, accurate, and current information is available for use. This means inevitably you will need to prune outdated content from your KR. Here are some best practices to help determine when content should be deleted or archived:

- Define your "review for deletion" process as part of your content management process. This should include a standardized and scheduled audit process to evaluate the relevance and accuracy of content as it ages. This should also include specific criteria for when content should be removed/archived.
- One way to manage outdated content is by setting expiration review dates. For instance, content that hasn't been used in 2-3 years should be flagged for review and potential removal.
- We recommend that instead of deleting old content you move the material into a structured archiving system outside pWin.ai's KR so you always have it for historical purposes.

4. Assign Clear Team Roles

To institute an effective content management strategy, having clear roles and responsibilities is imperative. Appointing at least one Content Manager as the owner of the KR content management process and overseer of the content strategy can help define the process that is followed by the organization. Other roles that may be valuable include:

- Content creators/writers are responsible for content creation, typically related to a specific domain.
- Content reviewers/editors check accuracy, compliance, and alignment with organizational standards.
- Subject matter experts (SMEs) provide detailed, specific knowledge and insight into specialized topics. SMEs ensure the content's technical accuracy and comprehensiveness. They may be the content creator, or the content reviewer, or may serve in an advisory capacity.

For organizations that need hands-on help, bringing in a trusted content management partner can be a big help and improve efficiency and quality. Shipley Associates' Content Management as a Service (CMaaS) offers an expert review of your content management process along with recommended improvement actions and they can also provide personnel to write, review, de-duplicate, and curate your KR.

5. Break Long-Form Documents into Smaller Artifacts

Dividing content into smaller, distinct pieces—such as individual sections for technical solutions, executive summaries, or past performance—offers several advantages:

- **Targeted Management:** Smaller artifacts are easier to manage, allowing for focused updates and revisions. This approach allows for incremental improvements without needing to overhaul entire documents at once.
- **Streamlined Review and Approval:** By segmenting content into manageable chunks, the review and approval process becomes more efficient. This ensures higher quality and accuracy without overwhelming reviewers with lengthy documents.
- **Avoiding Duplicate Content:** Breaking content into smaller sections also pairs well with efforts to limit or eliminate duplicate content. This not only enhances the quality of the knowledge base but also makes it easier for pWin.ai to pull relevant, non-repetitive information when generating proposal responses.

6. Recognize the Importance of Metadata

Metadata (information that describes and defines data) is vital for enhancing search functionality and improving retrieval accuracy within your knowledge repository. Automated tools and machine learning models can help in generating consistent metadata, leading to better overall outcomes.

Here's how metadata helps:

- Metadata provides additional context beyond the document's content, such as document type, author, and relevance scores, helping narrow down results to those most relevant to the query.
- By incorporating metadata into ranking algorithms, you can prioritize documents that are not only semantically relevant but also contextually appropriate.
- Metadata allows for more efficient indexing of documents, enabling quicker retrieval of relevant information. For example, you can index documents based on categories or tags, allowing the search system to focus directly on the most pertinent data.

Conclusion

Make your KR work for you. Keep it up-to-date, relevant, and organized, and watch your proposal process transform.