



Optimize**23**

# The Future of Automation

For Business Development, Proposal Management, and Contracts teams.



# Thank you for joining the Optimize23 Virtual event

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I would like to express my heartfelt gratitude for the phenomenal success of Optimize23. The virtual event hosting 13 talks was an incredible experience for everyone involved, and I want to thank all of you for your hard work and dedication to making it happen.

With over 1500 registrations across over 750 organizations globally, Optimize23 was a truly international event that brought together people from all walks of life to share their knowledge, ideas, and experiences. The talks were informative, thought-provoking, and inspiring, and they left a lasting impression on everyone who attended.

I can say with confidence that it was an unforgettable experience, and I am grateful for the opportunity to have been a part of it. It was a great pleasure to learn from some of the brightest minds in their respective fields and to connect with like-minded individuals from around the world. We cover an incredible amount of important and insightful topics. I'm delighted to share the insights and content with you in this document.

Thank you once again to all involved for all that you did to make Optimize23 such a resounding success. Your hard work and dedication are truly appreciated.

**Micheál McGrath**  
Head of Marketing  
[VisibleThread](#)



## PRESENTATION TITLE

# Preparing for Tomorrow: The Role of Automation in shaping our Future

## SPEAKERS



Rick Harris  
CEO



Fergal McGovern  
CEO and Founder



## DESCRIPTION

The event was an absolute must-attend for business leaders and professionals who were keen on staying ahead of the curve in the ever-evolving world of automation.

Our speakers discussed the implications of these developments for businesses and organizations, and provided practical strategies that could be leveraged to drive growth and improve efficiency using automation. Attendees left the event empowered with newfound knowledge and equipped to navigate the rapidly-changing automation landscape.

## KEY LEARNINGS

1. Explore the common factors that make automation a game-changer, and how metrics can help you create a business case for automation.
2. Ensure your full team is involved and advocating new automation software.
3. AI and ChatGPT - It will replace the mundane tasks, not the proposal writer role in totality.

## LINKS



Watch Recording

## ADDITIONAL RESOURCES

**Case Study** [How AIRBUS use VisibleThread in their proposal process](#)

**Whitepaper** [Winning Contracts through Automated Proposal Management Whitepaper](#)

**Webinar** [How Automation Can Transform Your Business Development Process Webinar](#)



#### PRESENTATION TITLE

# Contracting Success Story: Insights for Government and Commercial Contracting

#### SPEAKERS



**Anatalia Macik**  
Proposal & Bid Director



#### DESCRIPTION

The informative customer spotlight session at Optimize23 featured Leidos' Proposal & Bid Director, Anatalia Macik. Anatalia shared valuable insights on navigating the complex government and commercial contracting world.

Attendees learned proven strategies for success with VisibleThread and gained valuable knowledge on how to master the art of winning contracts in both sectors. Whether new to the contracting world or seasoned professionals, the session was a must-attend for anyone looking to improve their chances of success.

#### KEY LEARNINGS

1. How proposal development best practices apply across different industries despite potential differences in requirements.
2. How pre-planning and strategizing can help overcome any differences and potential obstacles.
3. Compliance is always a critical factor and should not be overlooked.

#### LINKS



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Presentation deck

#### ADDITIONAL RESOURCES

**Guide** [The Ultimate Guide to Proposal Writing](#)

**Whitepaper** [Winning Contracts through Automated Proposal Management](#)

**Webinar** [The Art Of Proposal Writing](#)



## PRESENTATION TITLE

# Maximizing success through collaboration: Proposals, Business Development, and Capture

## SPEAKERS



**Fred Vlcek**  
Business Development Operations



**Marcia Watson**  
Sr. Director of Proposal Operations



**Steve Skeldon**  
Capture Director



## DESCRIPTION

This panel discussion covered maximizing success through collaboration in proposals, business development, and capture. During the session, we shared VisibleThread customer insights from organizations such as Cherokee Federal, Chickasaw Nation Industries, and Pragmatics. The panel discussed the challenges and opportunities of collaboration in the proposal process, and shared the best practices they had used to increase win rates and improve performance. It was a unique opportunity to learn from industry leaders who had been successful in implementing collaboration in their organizations and ask them questions. The panel discussion was a must-attend event for anyone looking to improve their collaboration efforts and win more business, whether they were a proposal manager, business developer, or capture manager.

## KEY LEARNINGS

1. Overcoming bid challenges: Finding the disconnect, breaking silos and sharing info between teams.
2. Moving from compliant to compelling - Identifying win themes and discriminators
3. The panels thoughts and recommendations for the future - Automation, AI and where is the bid and proposal craft headed

## LINKS



Watch Recording

## ADDITIONAL RESOURCES

**Guide** [Why do we lose multi-million-dollar bids?](#)

**Case Study** [How Pragmatics Improved Their Proposal Efficiency And Increased Compliance With VisibleThread](#)

**Guide** [Strategies for successful proposal management Guide](#)



## PRESENTATION TITLE

# Transform your proposal process with these proven optimization strategies

## SPEAKERS



**Kelson Forsgren**  
VP, Program Development



Shipleys Associates



**Amy McGeady**  
Senior VP



Shipleys Associates

## DESCRIPTION

Teams that follow a repeatable proposal process that's based on best practices consistently win more business with greater efficiency. Team members experience fewer miscommunications and frustration and more alignment and productive teamwork.

In this session, Amy and Kelson provided an overview of the Shipley process – a process that produces winning results across industries.

We'll talk through how to tailor this process to fit your organization's needs, highlighting some common pain points and solutions for overcoming them.

## KEY LEARNINGS

1. Learn how automation can help you avoid common pain-points like poor planning.
2. Optimizing your proposal development with the POWeR strategy
3. Creating a playbook for your proposal process.

## LINKS



Watch Recording



Presentation deck

## ADDITIONAL RESOURCES

**Case Study** [How AIRBUS use VisibleThread in their proposal process](#)

**Whitepaper** [Winning Contracts through Automated Proposal Management](#)

**Guide** [The Ultimate Guide to Proposal Writing](#)



## PRESENTATION TITLE

# Overcoming Burnout in Proposal Management: Strategies for Sustaining Productivity and Well-being

## SPEAKERS



Mairi Morrison  
CEO



## DESCRIPTION

This informative presentation at Optimize23 featured Mairi Morrison. Mairi shared her latest research on burnout in proposal management and provided valuable strategies for sustaining productivity and well-being. Mairi provided an in-depth look at the causes of burnout and its impact on proposal managers and teams. She also shared practical tools and techniques for preventing and managing burnout. This session gave you the insights and tools needed to overcome burnout and thrive in your role. It was an opportunity not to be missed to learn from one of the leading experts in the field.

## KEY LEARNINGS

1. Essential information for proposal managers who want to sustain productivity and well-being.
2. Streams contributing to proposal management stress and the impact of these.
3. Factors to consider when trying to avoid burnout such as shifting attitudes towards work, being more cautious when committing and people moving to smaller companies.

## LINKS



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Presentation deck

## ADDITIONAL RESOURCES

**Webinar** [What's Next For BD & Proposals?](#)

**Whitepaper** [Winning Contracts through Automated Proposal Management](#)

**Guide** [The Ultimate Guide to Proposal Writing](#)



## PRESENTATION TITLE

# What's Next for VisibleThread? A Look at Our Product Roadmap

## SPEAKERS



Eoin Wren  
VP of Engineering

 VisibleThread

## DESCRIPTION

Watch this exciting presentation where we revealed the future of VisibleThread's product roadmap. VisibleThread's VP of engineering Eoin Wren shared the latest advancements and upcoming features that would be transforming the proposal development and management process. Attendees had the opportunity to learn about the new capabilities that would be available to help them improve their proposal process and win more business. Whether you were a proposal manager, business developer, or capture manager, the webinar was a must-attend event for anyone looking to stay ahead of the game and take their proposal process to the next level.

## KEY LEARNINGS

1. The release of VT writer Word Add-in on premise.
2. The 2 consistent themes for the improvements of VT Docs over the last year.
3. Listening to VisibleThreads customers and introducing improvements like detecting Auto-numbered headings in MS-Word.

## LINKS



Watch Recording



Presentation deck

## ADDITIONAL RESOURCES

**Case Study** [How AIRBUS use VisibleThread in their proposal process](#)

**Whitepaper** [Winning Contracts through Automated Proposal Management Whitepaper](#)

**Blog** [VT Writer – Standing out from the crowd](#)



#### PRESENTATION TITLE

# Driving Change through Effective Communication: The Key to Success in Organizational Transformation

#### SPEAKERS



**Kevin Press**  
Principal  
Kevin Press  
Communications



**Andrew Lohmeier**  
Content Strategy Director  




**Pinaki Kathiari**  
CEO & Co-Founder  


#### DESCRIPTION

We hosted a panel with Kevin Press, Andrew Lohmeier, and Pinaki Kathiari on driving change through effective communication. They shared strategies for communicating change within organizations and insights from leading transformation in different industries. Attendees learned from industry leaders and had the chance to ask questions. The event was a must-attend for anyone seeking to improve their organizational change efforts.

#### KEY LEARNINGS

1. Effective communications - What impact of poor communication has the panel seen?
2. The importance on planning and having a shared vision and asking key questions.
3. The role of technology for writers in driving change and the importance of using the language of your audience.

#### LINKS



Watch Recording

#### ADDITIONAL RESOURCES

**Case Study** [How AIRBUS use VisibleThread in their proposal process](#)

**Whitepaper** [Winning Contracts through Automated Proposal Management Whitepaper](#)

**Webinar** [How To Create Value And Alignment Through Clear Communication](#)



## PRESENTATION TITLE

# Unlocking the Power of VT Writer: A Product Showcase Workshop

## SPEAKERS



**Scott Salvody**  
Account Executive

 **VisibleThread**

## DESCRIPTION

Watch this product showcase workshop featuring VisibleThread's VT Writer. Our experts demonstrated the software's features and how it could improve writing quality, consistency, and efficiency. Attendees participated in hands-on exercises and saw real-life examples of how VT Writer could enhance writing in various industries. The workshop offered valuable insights and practical takeaways for writers, editors, and business leaders.

## KEY LEARNINGS

1. See how VT Writer can improve the quality, consistency, and efficiency of writing.
2. The workshop included hands-on exercises and real-life examples
3. The workshop provided valuable insights and practical takeaways that you can apply to your own work.

## LINKS



**Watch Recording**

## ADDITIONAL RESOURCES

**Case Study** [How AIRBUS use VisibleThread in their proposal process](#)

**VT University** [Get the most out of VisibleThread](#)

**Blog** [VT Writer – Standing out from the crowd](#)



#### PRESENTATION TITLE

# Give yourself grace, and the opportunity to succeed

#### SPEAKERS



**Guy Timberlake**  
Chief Executive Visionary and Co-Founder



#### DESCRIPTION

In the federal sector, business leaders often put their teams and even their world on their backs. This weight could prevent them from achieving victories and blind them from seeing the help and guidance available from friends, colleagues, and mentors. When leaders made decisions reactively and out of desperation, they lost focus and motivation. It was important for business leaders in Federal Contracting to give themselves grace, and a better opportunity for them and their teams to succeed.

#### KEY LEARNINGS

1. We are not alone as business leaders. What are the characteristics of a business leader?
2. Motivation - Making me better!
3. Ensuring we understand the business vs just going out and doing the business

#### LINKS



Watch Recording

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**Case Study** [How Pragmatics Improved Their Proposal Efficiency And Increased Compliance With VisibleThread](#)

**Webinar** [How To Create Value And Alignment Through Clear Communication Webinar](#)



PRESENTATION TITLE

# Collaboration for Success: Leveraging Teamwork to Win Proposals, Drive Business Development, and Capture Opportunities

SPEAKERS



Jennifer Adeli  
Chief Growth Officer

EDGESOURCE



Stephanie Zink  
President

TAURUS  
GROUP INC.



Tan Wilson  
President

entellect

DESCRIPTION

Watch our roundtable discussion on collaboration in proposal, biz dev, and capture. Experts share how teamwork wins proposals, drives dev, & captures opportunities. Learn best practices for high-performing teams, overcoming challenges, & fostering collaboration. Apply takeaways to your work, whether a manager, dev pro, or leader.

KEY LEARNINGS

1. Where does proposals fit into the org chart? Proposals gets all the blame and none of the glory
2. What are the best practices for building and leading high-performing teams?
3. Takeaways for young professionals and how to increase your credibility within your organisation - Ask the hard questions and having the right attitude.

LINKS



Watch Recording

ADDITIONAL RESOURCES

**Guide** [Why do we lose multi-million-dollar bids? Guide](#)

**Case Study** [How AIRBUS use VisibleThread in their proposal process](#)

**Webinar** [From Zero To \\$60 Billion: The Incredible Impact Of Automation And AI In Contracting Webinar](#)



PRESENTATION TITLE

# Navigating the Evolving Landscape of Contract Management

SPEAKERS



**Dr. Dolores Kuchina**  
Chief Disruptor, Rexota Solutions, LLC



**Ryan Connell**  
Deputy Director of Commercial, Item Group



DESCRIPTION

This roundtable discussed contract management's evolving landscape. VP Kyle Peterson and members of NCMA shared insights on technology, data analytics, compliance, and challenges faced by organizations. Practical tips and strategies were also provided. Valuable insights were provided for contract managers, procurement professionals, and business leaders.

KEY LEARNINGS

1. In this roundtable we discuss the challenges for contracts teams being viewed as compliance only and being isolated from commercial partners.
2. Best practices and automation solutions used to break down these silos, to help accelerate the process of contract negotiation.
3. The panel discusses where they think the focus and emphasis is going to lie moving forward, highlighting the importance of market research.

LINKS



Watch Recording

ADDITIONAL RESOURCES

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**Case Study** [How AIRBUS use VisibleThread in their proposal process](#)

**Webinar** [From Zero To \\$60 Billion: The Incredible Impact Of Automation And AI In Contracting](#)



PRESENTATION TITLE

# Efficiency and Accuracy: A Product Showcase Workshop on VT Docs

SPEAKERS



Kyle Peterson  
VP of Customer Success

 **VisibleThread**

DESCRIPTION

Join our interactive workshop to see how VT Docs revolutionizes document management. VP Kyle Peterson demoed features, improving efficiency, accuracy, & compliance. Try exercises and real-life examples across industries. VT Docs helps identify & manage risks, control versions, and promote collaboration. Valuable insights and practical takeaways for document managers, compliance officers, and business leaders.

KEY LEARNINGS

1. Analyze docs with objective data using VT Docs. Find alignment, changes, and readability.
2. Discover VT Docs' holistic approach to document analysis. Leverage natural language processing to identify key themes across industries and competitors.
3. Kyle demonstrates VisibleThread's features: Discovery for theme search, Compare Docs for literal changes, Readability for stakeholder comms.

LINKS



Watch Recording

ADDITIONAL RESOURCES

**Case Study** [How AIRBUS use VisibleThread in their proposal process](#)

**Whitepaper** [Winning Contracts through Automated Proposal Management](#)

**Blog** [VT Writer – Standing out from the crowd](#)



## PRESENTATION TITLE

# GDIT's journey towards greater automation: A look at VisibleThread's role

## SPEAKERS



**Brandon Costanzo**  
Solutions Director, Technology Shared Services

**GENERAL  
DYNAMICS**

## DESCRIPTION

In this customer spotlight presentation, Brandon Costanzo from General Dynamics shares their journey towards greater automation and the role that VisibleThread played in it.

It's unique opportunity to learn from a leading industry player about the power of automation and how it can be used to improve proposal development and management process. Whether attendees were a proposal manager, contracts manager, solutions architect, business developer, or capture manager, this customer spotlight was a must-attend event for anyone looking to improve their automation efforts and win and execute more business.

## KEY LEARNINGS

1. Setting the stage - What solution fits the bill? Leveraging the tools and the process behind it.
2. Using data intelligence outputs from one platform to another to see what the customer is asking of us
3. Circle of progress: AI arms race. love letters, itineraries and 3rd to 1st person

## LINKS



Watch Recording



Presentation deck

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**Whitepaper** [Winning Contracts through Automated Proposal Management](#)

**Webinar** [How Automation Can Transform Your Business Development Process](#)