

A defined customer-insight process

High-win teams do not win because they write more. They win because they run a **defined** customer-insight process before anyone drafts.

The 2026 Proposal Win Rate Report surveyed 97 bid professionals (90 with verified win-rate data). High-win teams (51%+) rank customer insight as a top win driver at nearly four times the rate of low-win teams. 88% of high-win teams have a defined customer-insight process, against 67% of low-win teams. 71% do formal customer research, against 50%.

Presumed relationship strength showed no meaningful correlation with win rate.

Relationships help you win access. Insight helps you win.

Content determines what you say; insight determines why it matters.

A generic response can still be competent. It still fails when the marker looks for their nouns, their pressures, and a fact they can check. This page is the process. Page 2 is the brief you fill for one bid.

Source: 2026 Proposal Win Rate Report (autorfp.ai/win-rate-report). High win 51%+. Low win 0–25%.

WHO OWNS INSIGHT

Seller What the buyer said. Source drops.	Bid manager Locks language and facts into the response.	SME Method and proof in their box. Does not overwrite locked nouns.	Exec Reads the storyboard, not a brochure.	Agent Compiles, cites, routes gaps. Does not invent.
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WHERE INSIGHT LIVES

Internal (1st party) CRM, calls, internal discussions, seller notes, lost-deal notes	External (3rd party) Filings, IR, careers, privacy notices, statutory packs, public-file search	Firmographic and evaluator Legal entity, headcount growth, job posts, geography, size Who marks, and what they score
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HOW YOU USE THIS

1 Label owners	2 Map where insight lives	3 Collect from those buckets (do not invent)	4 Fill the brief on page 2
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Page 2 is the brief. Leave a box blank if you do not have the source.

BUYER

OPPORTUNITY

DATE

Circulation: Seller, bid manager, SMEs, exec reviewer · Insight for the bid team. Not the response.

CONTACT SO FAR

Name

Stage

Owner

Close date

Who we have spoken to			Chronology		
NAME	TITLE	SOURCE	DATE	TITLE Meeting title, date	ONE LINE FROM THE RECORD

LANGUAGE THEY USE

Must use	Do not introduce

Only words that appear in CRM or the RFP. If silent, write Silent.

DRIVERS AND PAIN

Insight + source (meeting title and date)

No product claims.

GAPS

Missing from contact history. Not a score.