



Relevant Match Managers Guide

Proposal Manager!

After 1st Installation, read this guide to Customize the Relevant Match app, and start using it on a daily basis.

The screenshot displays the 'View Dashboard - Relevant Match v4.3.3' interface. At the top, there is a navigation bar with icons for 'Where I Left Off', 'RFP Info', 'Earlier Version', 'New RFP / Amendment', 'Close Current', 'Demo RFP', 'Navigation', 'Dashboard', 'Registration Info', 'Current SOW', 'Prior SOW', 'Current Draft', 'Analyze', 'Radar Chart', 'Chart', 'Report', 'Analyze & Compare', 'Close Analyze Screens', and 'Refresh All'. Below this is the 'RFP Navigation' section with tabs for 'Steps', 'What Documents Am I Using?', 'Global Filters', and 'Global Sorting'. The main area is divided into three steps: 'Step 1 - Get Ready' (with a 'Check RFP Info' button), 'Step 2 - Get Set' (with 'Import SOW' and 'Import Proposal' buttons), and 'Step 3 - Go' (with an 'Analyze & Compare' button). Below the steps is a 'Dashboard' section with three panels: 'Solicitation' (National Health Caregiver Certification and Whitecaps November Test Project), 'Current Documents' (Whitecaps SOW for Testing), and 'Last Run' (Most Recent Run Correlation: 35.96, Days Since Last Updated Proposal: 1,005, First Draft Correlation Score: 32.55, Percent Improvement: 109.1%, Approximate Page Count: 11, Count of Proposal Versions Analyzed: 5, Days per Version: 0.00). At the bottom is a 'Proposals' table with columns: Doc ID, Proposal Name, Proposal Version, Date Imported, Document Format, File Size - Bytes, Page Count, TCS, and Trend. The table shows 7 records, with the most recent being Doc ID 57, Proposal Name 'Whitecaps_Broadword Proposal version 7', Proposal Version 7, Date Imported 1/8/2021 2:41 PM, Document Format MS Word, File Size 39655, Page Count 8, TCS 61.86, and Trend Up.

Doc ID	Proposal Name	Proposal Version	Date Imported	Document Format	File Size - Bytes	Page Count	TCS	Trend
57	Whitecaps_Broadword Proposal version 7	7	1/8/2021 2:41 PM	MS Word	39655	8	61.86	Up
56	Whitecaps_Broadword Proposal version 6	6	1/8/2021 2:40 PM	MS Word	57579	19	58.63	Up
55	Whitecaps_Broadword Proposal version 5	5	1/8/2021 2:40 PM	MS Word	35386	11	35.96	Down
54	Whitecaps_Broadword Proposal version 4	4	1/8/2021 2:40 PM	MS Word	87040	38	60.20	Up
53	Whitecaps_Broadword Proposal version 3	3	1/8/2021 2:40 PM	MS Word	77156	10	37.66	Down
52	Whitecaps_Broadword Proposal version 2	2	1/8/2021 2:39 PM	MS Word	17215	4	47.41	Up
51	Whitecaps_Broadword Proposal version 1	1	1/8/2021 2:39 PM	MS Word	32608	12	32.95	Up

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1. Introduction

Working smarter, not harder!

This old wisdom is exactly that path that you have chosen using Relevant Match proposals optimizer application. Relevant Match is a small but powerful business application for you, the Proposal Manager, to guide your team as they write your proposal.

You will get the most out of Relevant Match if you follow these guidelines:

- 1. Keep Relevant Match open all during the proposal period.*
 - 2. Set a rhythm to run Relevant Match at least once a day on your daily production.*
 - 3. Run the Thematic Correlation Score optimizer on each new version of your proposal.*
 - 4. Do your editing and combining of sections before importing into Relevant Match.*
 - 5. Use the dashboard*
-

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1.1. Set a rhythm with your Team Meeting

Relevant Match software is designed for the Proposal Manager, but your team has to know how to use it too.

As an experienced proposal manager, you know that a successful proposal production depends upon solid planning and scheduling. You can't miss the submission deadline, so organization is critical.

Every time you write a version of your written proposal, from the first draft to the White Glove copy, run it through Relevant Match. It shows your progress by the Thematic Correlation Score (TCS). It will show you what terms are important to emphasize or de-emphasis. You have to let your team know where to adjust. Depending on your proposal timeline and work schedule, you might set a rhythm like this:

Every day:

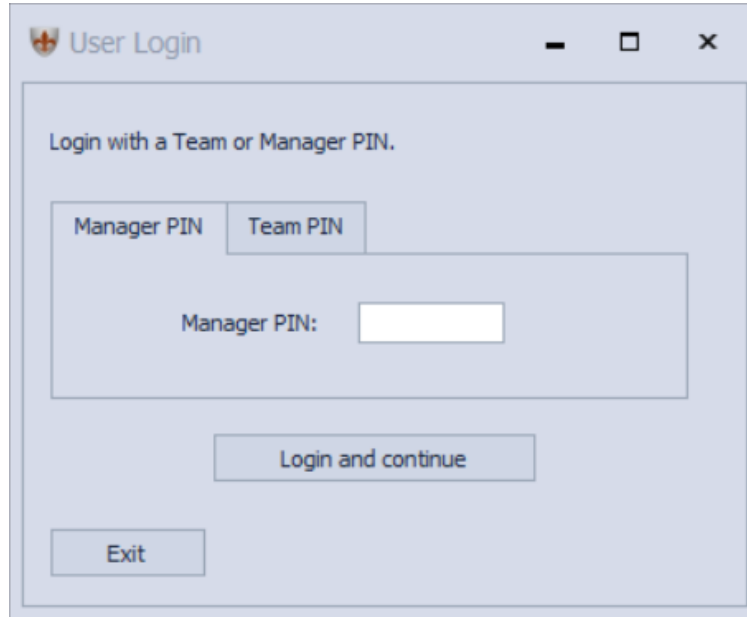
8:15 am	Get the latest proposal write-ups and edits from last evening. Upload them and run TCS with Relevant Match
8:30 am	Proposal Team stand-up meeting Give your team guidance: <i>“Engineering, we need better explanation of how we will address user requirements.”</i> <i>“Logistics, you are in good shape, your TCS is at .83 and it reads well. You covered all the important points.”</i> <i>“Training, you are using too many acronyms which are not in the SOW. Relook at what they are asking”</i> <i>“Post your re-writes by noon.”</i>
9:00 am	Run the Relevant Match report. You can send the daily report to the senior manager who you need to keep informed
12:15 pm	Get the edits from that morning, upload and run TCS with Relevant Match
12:30 pm	Email your team: <i>“Engineering, good job, your TCS is .75, a little more content and you should be good.”</i> <i>“Logistics, what happened? You wrote more but TCS went down to .70. Are you wandering off the key win points? Let’s do another version for tomorrow morning.”</i> <i>“Training, I like what you wrote, and it matches much better to the SOW. Keep it up.”</i>
12:45 pm	Get a cup of coffee, eat some lunch, breathe
1:30 pm	Review graphics, meet with Executives
	Next day, repeat. You’re on track!

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1.2. Security Controls

Manager's PIN

Use your 4-digit Manager PIN to log into the application. These PINs are provided to you with your Activation Code. If you forget your PIN, send an email with your Activation code to support@relevantsoftware.us.



Team PIN

The Team PIN is also included with your license. If you wish to have others work with Relevant Match you can provide them the Team PIN, which allows all functions except the App Admin menu group. Only the Manager's mode has access to these controls.



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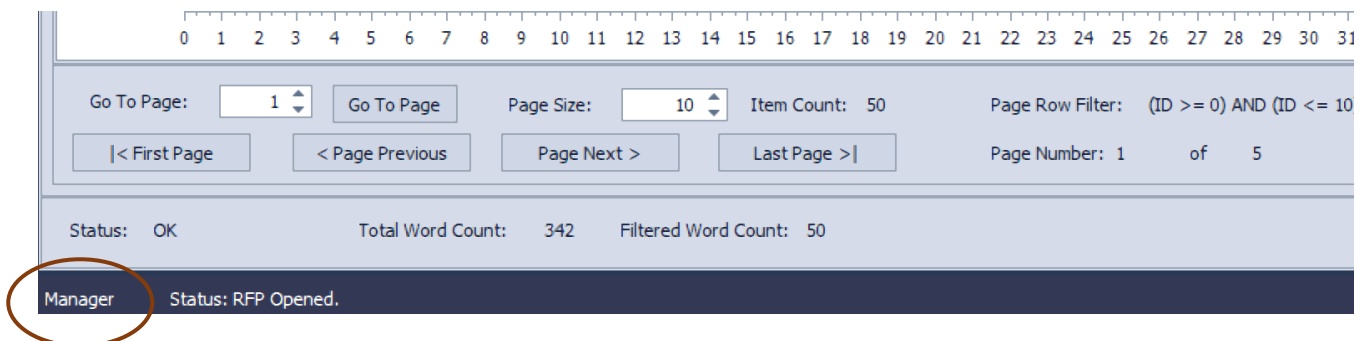
Manager Mode is a special software administration and management mode that is activated by logging in to Relevant Match software either via the Manager PIN or the Manager user ID and password. It permits the Manager user to access screens and information that the regular Team Mode user cannot.

Regular Team Mode allows Team users to access everything that they need to use Relevant Match software in its normal analysis mode. The Manager Mode login displays one additional top ribbon menu tab page called “App Admin” that allows the Manager user, but not the Team user(s), to access setup, license, and management/administration screens for Relevant Match.



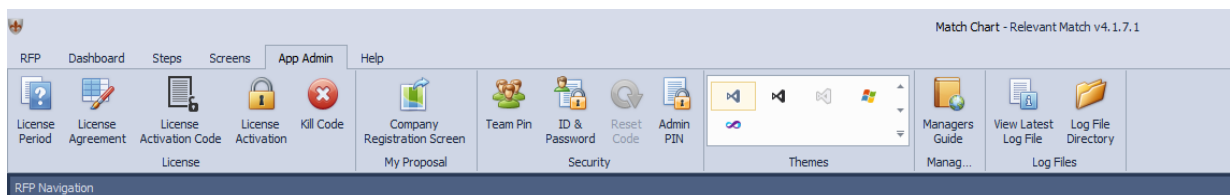
In normal operation, Team users do not need to use Manager Mode or need access to the “App Admin” menu items or screens. You should not share your Manager PIN and/or user ID and password – keep it private to yourself as the Proposal manager.

With a Team PIN login, the Relevant Match software displays in normal user mode. This is indicated by the word “Team” displayed in the lower left of the program footer right before the “Status:” indicator. When you log in with a Manager PIN or user ID and password the word “Manager” is displayed instead. This tells you that the program is in Manager Mode.



1.3. Manager Mode Menus

Manager Mode allows for an entire ribbon menu tab to become visible and enabled.



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The App Admin Menu is only available for Manager logins and mode. It is not available or visible in regular User logins or mode. The Add Admin Menu provides for administrative functions and operations, organized into four menu groups:

License Group:

The License menu group contains menu buttons for the license display and management screens.

License Period – Displays the License Period screen.

License Agreement – Displays the License Agreement screen.

License Activation Code – Displays the License Activation Code screen.

License Activation – Displays the License Activation screen.

Kill Code – Displays the Kill Code entry screen.

My Proposal Group:

The My Proposal menu group contains two menu items for the administration of proposals.

Company Registration Screen – Displays the Company Registration screen.

Solicitation Screen – Displays the Solicitation Info screen.

Security Group:

The Security menu group contains four menu items for security functions.

Team PIN – Displays the Team PIN login screen.

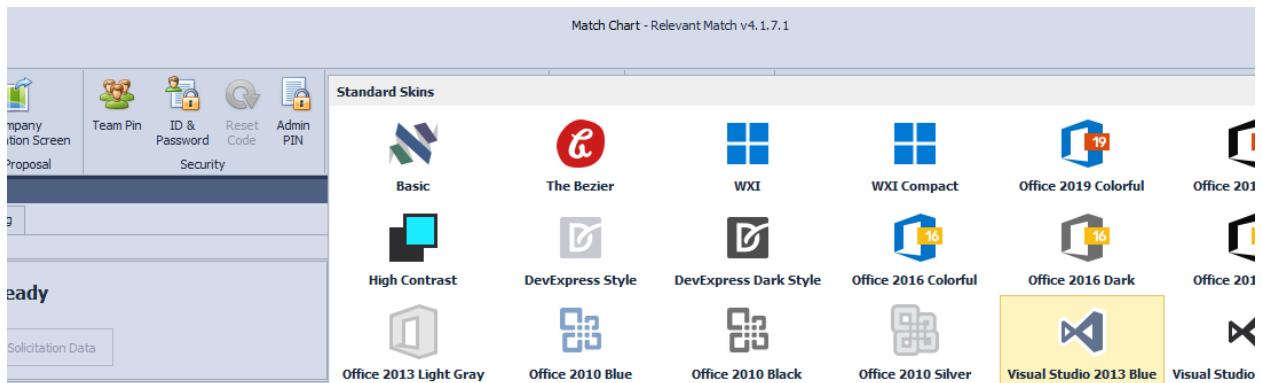
Reset Code – Displays the Reset Code screen.

Admin PIN – Displays the Admin PIN login screen.

Themes Group:

Simply click on the drop-down buttons to expand the theme selection panel and click on one of the themes to set and display that theme.

The selected theme is automatically saved to the project database when the project is closed. Managers may select any of the many provided themes. But regular Team users cannot.



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The selected theme is saved in the project file and will automatically apply the next time the program is run.

1.4. Other functions in the App Admin Menu group

1.4.1. Kill Code

The Kill Code dialog screen allows a Kill Code to be entered and run. A Kill Code is only issued by Relevant Match Support when a license needs to be transferred from one machine to another. The Kill Code invalidates the license on the machine where the Kill Code is entered. Use this screen only under the express direction of Relevant Match Support.

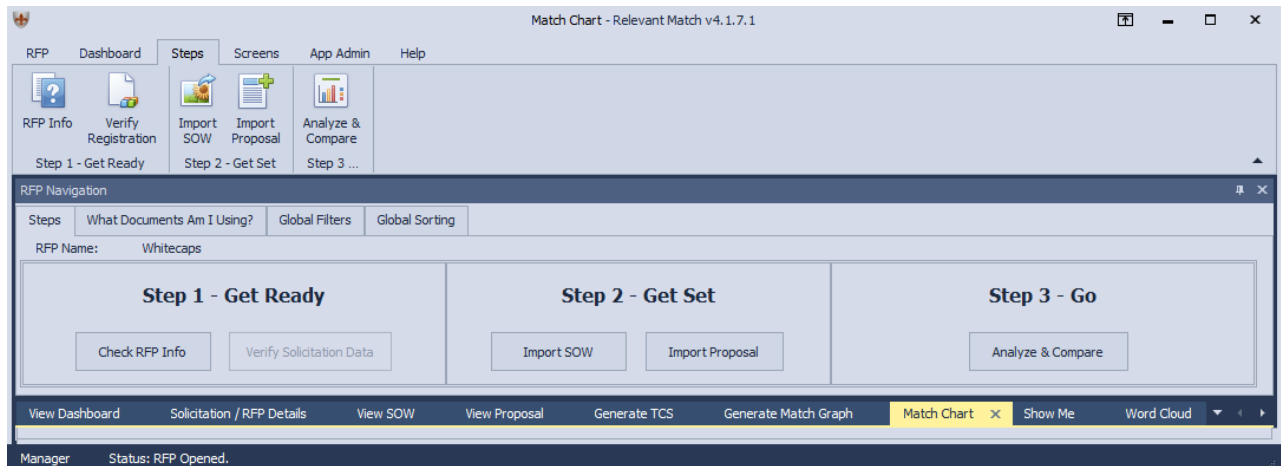
1.4.2. Admin Pin

The Admin PIN is only used when provided by Relevant Match support for diagnosis of issues. It is not used in the course of normal use of Relevant Match.

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2. Working in the Relevant Match application.

When you start Relevant Match after Installation and Sign In, you will see this set of controls:



These are the **STEPS** you will use repeatedly to score every version of your proposal. The Steps Group in the top menu banner, and the Steps tab in the Project Navigation, are the same controls.

Step 1 for a new proposal is to Get Ready and enter the basic information needed by the software to run the analysis.

Step 2 for a new proposal import first the SOW, then the very first version of your Proposal. It may be just an outline, or a rough draft. No matter, it's the start of your winning Proposal. Importing these two initial documents triggers the analysis algorithms separately. You will only need to import the SOW one time unless it changes. Thereafter, import every new version of your Proposal before running Step 3.

Step 3 triggers four separate outputs:

1. Thematic Correlation Score (TCS). This is the number that matches your Proposal to the SOW.
2. The Match Graph. This shows the relative occurrence of key words in your document and shows you where to write more or write less. The graph defaults to 30 thematic words, but the number of words displayed can be customized in the Global Settings tab. This is like looking at "each of the trees in the forest."
3. The Match Chart. This shows is a visual representation of how your Proposal correlates to the SOW. This is like looking at "the forest but not each of the trees." It provides you the big picture of how well you are addressing the SOW.
4. The Match Report. This is a pre-formatted report intended for the Proposal Manager to share with upper management. Use it for a daily spot status, or a supporting document during color team reviews.

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3. Every time after the First Time Use

After the 1st installation, when you launch Relevant Match from the shortcut, it will remember your settings and the information you have entered. It may take as many as 10 seconds to load after you click to load the files.

When you are ready to do another analysis run, first close the current TCS, Graph, Chart and Report. That will make room on your dashboard for the new ones. Then import another version of your proposal, and Relevant Match will automatically regenerate the TCS and Graphs based on the most current version. The Dashboard records the versions and analyses.

4. The Dashboard

Every time you import and analyze a new version of your working proposal, the results are listed on the Dashboard, along with a summary of the Solicitation and other useful information organized into four tiles: Solicitation, Current Documents, Last Run, and Proposal.

The Dashboard tab is your total view of all the versions of your proposal. Keep this tab open and review it often.

The screenshot displays the 'View Dashboard' window. The dashboard is divided into four main sections: Solicitation, Current Documents, Last Run, and Proposals. The 'Solicitation' section provides details for 'FBMA Whitecaps November Test Project'. The 'Current Documents' section lists the 'Whitecaps SOW for Testing' and 'Whitecaps_Broadsword Proposal version 5'. The 'Last Run' section shows metrics like 'Most Recent Run Correlation: 35.96' and 'Days Since Last Updated Proposal: 683'. The 'Proposals' section is a table listing various proposal versions from 1 to 7, including their import dates, document formats, file sizes, page counts, TCS scores, and trends.

Doc ID	Proposal Name	Proposal Version	Date Imported	Document Format	File Size - Bytes	Page Count	TCS	Trend
57	Whitecaps_Broadsword Proposal version 7	7	1/8/2021 2:41 PM	MS Word	39655	8	61.86	Up
56	Whitecaps_Broadsword Proposal version 6	6	1/8/2021 2:40 PM	MS Word	57579	19	58.63	Up
55	Whitecaps_Broadsword Proposal version 5	5	1/8/2021 2:40 PM	MS Word	35386	11	35.96	Down
54	Whitecaps_Broadsword Proposal version 4	4	1/8/2021 2:40 PM	MS Word	87040	18	60.20	Up
53	Whitecaps_Broadsword Proposal version 3	3	1/8/2021 2:40 PM	MS Word	77156	10	37.66	Down
52	Whitecaps_Broadsword Proposal version 2	2	1/8/2021 2:39 PM	MS Word	17215	4	47.41	Up
51	Whitecaps_Broadsword Proposal version 1	1	1/8/2021 2:39 PM	MS Word	32608	12	32.95	Up

There **Solicitation** tile reflects the information that you entered during the installation of Relevant Match.

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The **Current Documents** tile shows you the file names and locations. Relevant Match does not alter your original files. You can use them exactly as they were created to edit and revise.

The **Last Run** tile shows you metrics about your most recent proposal version.

The **Proposals** tile shows a running list of each proposal and its metrics. This is how you track improvement of your TCS from version to version.

5. Thematic Correlation Score (TCS)



The TCS is the complex algorithm which evaluates your proposal against the SOW. Similar to the evaluators, it scores the proposal looking at how well it matches to the thematic content, structure, and produces a score from 0 to 1. Most first drafts of a complete proposal will score around .4. As you write more, the TCS will change, usually better, but not always. If you start to wander from SOW, your score can decrease. You should strive to increase the score with every version, until you reach between .50 and .80. If your score goes above .80, the narrative is reading too much like the SOW and you may not have enough original content.

Strive to get the TCS between .60 and .80. This is the proposal “sweet spot.”

6. What the graphs tell you

Relevant Match provides you three different graphs, each with default setting that can be configured to your preferences.

The most important analysis is the Thematic Correlation Score. It uses multiple factors to determine how well your proposal matches to the SOW. The Graphs are supporting information to help you find where to make changes to optimize your proposal.

The TCS Top 20 chart

Word frequency is one of the many factors which contribute to your TCS. The top 20 words are usually the most important to your message. This graph shows a side-by-side comparison of the top 20 words of the SOW and your current proposal version. It's not important they match exactly but if you have a difference greater than 50%, you should tell your writers to add or remove content accordingly.

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The Match Graph

In a single view, the graph provides a visual comparison of your proposal, always shown in Yellow, and the SOW, always shown in blue. The transparent colors show green as the overlap, which is what you want to achieve. You can change the chart type to suit your preference. Each version of your proposal should move closer to the visual fit of the SOW.

The Match Chart

In multiple pages, this graph provides a visual comparison of your proposal by absolute word frequency. This allows you to see where your writers are putting their emphasis.

7. The Report

You need to keep your execs informed throughout the course of the proposal, so Relevant Match provide an easy way to print the TCS and Radar Graph. You can send this via .pdf or .doc file.

8. After your proposal submission

All your original proposal versions remain unchanged in whatever location you have been using them. Relevant Match-generated files are located in the Relevant Software Corporation file folder and remain available to you after the solicitation is done and even after the license is expired.

Relevant Match Proposal Optimizer application is keyed to your computer for one Solicitation. For your next solicitation, contact [Relevant Software Corporation \(Support@relevantsoftware.us\)](mailto:Support@relevantsoftware.us). You will be able to load a fresh installation of Relevant Match with the latest updates and improvements.

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Your suggestions for changes and improvements are important to us. Visit our [website](https://www.relevantsoftware.us) to let us know.

[Relevantsoftware.us](https://www.relevantsoftware.us)

Relevant Software Corporation

Located in the National Capital area

With talent though out the United States of America

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