



AI POWERED  
BUSINESS DEVELOPMENT  
TECHNIQUES



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PRESENTS

## AI POWERED BUSINESS DEVELOPMENT TECHNIQUES

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## WHY AI IS CRITICAL FOR BUSINESS DEVELOPMENT SUCCESS

In today's fast-paced and highly competitive marketplace, embracing artificial intelligence (AI) is no longer optional—it's essential. Business development (BD) professionals face the pressure of consistently generating growth, building strong relationships, and staying ahead of industry trends. Those who harness the power of AI can significantly enhance their performance, while those who hesitate risk being left behind.

AI empowers business development teams to streamline processes, work more efficiently, and gain critical insights faster than ever before. From automating time-consuming tasks to analyzing massive amounts of data, AI enhances productivity, allowing professionals to focus on strategic decision-making. By tapping into AI-driven tools, BD teams can uncover hidden opportunities, improve client targeting, and gather valuable market intelligence to stay ahead of the curve.

For those willing to embrace AI, the rewards are clear: greater speed, precision, and insight—leading to sustained growth and a competitive edge. This guide walks you through key AI-powered techniques that can transform your approach to business development, ensuring you remain agile, proactive, and a step ahead of the competition.

## AI FUNDAMENTALS:

### Artificial Intelligence (AI)

- » Refers to computer systems that mimic human intelligence, enabling them to solve problems and understand language.

### Machine Learning (ML)

- » Teaching systems to learn from data, enhancing performance without explicit programming.

### Deep Learning (DL)

- » Employs layered neural networks to find intricate patterns, excelling in tasks like images and speech recognition.

#### KEY FEATURES:

**Natural Language Processing (NLP):** Analyzes large amounts of text to extract insights from market data, client communications, and competitor analysis.

**Predictive Analytics (PA):** AI predicts future trends and outcomes based on historical data, helping firms anticipate client needs and project opportunities.

# WHERE DO I BEGIN?

## STRATEGIC PLAN

Develop a strategic plan as a roadmap to where you want to go and how you will get there.

## BD AUDIT

Perform a BD audit and identify your BD challenges.

## IDENTIFY YOUR AI TOOLS

What are the best tools to help us solve our BD challenges?

Prioritize and assign the tool for someone to use and master then teach others. [Click for list of AI tools.](#)

## SET UP YOUR OWN GPT

Branding & Messaging, Client & Collaborator Lists, Ideal Client Profiles, Differentiators, Key Team Members LI Profiles, and Best Project.

## PUBLIC -VS- PRIVATE

**Public:** Anything you want your clients to see, put it out there for public consumption through AI. (ex. Project Cut Sheets)

**Private:** Anything you consider proprietary. (ex. SWOT)

## PROMPTS

Create a library of prompts using the **CORE** formula.

**Clarity, Objective, Relevant Details, Expected Outcome**

## BD PLAYBOOK

Make AI a part of your processes—a part of your BD Playbook.



# MARKET ANALYSIS & INSIGHTS

## MARKET TRENDS ANALYSIS

AI can aggregate and analyze vast amounts of data from sources like industry reports, economic indicators, social media trends, and public infrastructure plans to identify emerging market trends.

For instance, AI might detect a growing demand for sustainable building practices by analyzing social media sentiment and green building certifications across regions.

A firm can then pivot its business development strategy to align with market demand before competitors do.

## REGIONAL MARKET POTENTIAL ASSESSMENT

AI can assess the potential of different geographical markets by analyzing factors such as population growth, economic development, regulatory changes, and infrastructure investments.

For example, AI might identify that a specific region is poised for a boom in industrial development due to planned transportation infrastructure upgrades.

This insight allows the firm to target business development efforts in that region securing contracts for future projects.

## COMPETITIVE ANALYSIS

AI can monitor competitors by analyzing their online presence, project announcements, and public filings.

For example, if a competitor is consistently winning projects in a particular sector, AI can identify this trend, allowing the firm to adjust its strategies to compete more effectively in that space.

This continuous monitoring can alert business development teams to competitors' strategies and market moves in real-time.

## SCENARIO-BASED MARKET PLANNING & RISK ASSESSMENT

AI can create different scenarios based on market trends and external factors (e.g., economic downturns, regulatory changes, etc.) to help firms plan for the future.

For example, AI might simulate the impact of a proposed infrastructure bill on different sectors, allowing your firm to strategize which sectors to target for growth and expansion.

This proactive approach ensures your firm is prepared for multiple possible futures, reducing risk and enhancing growth prospects.



### USE CASE 1

ChatGPT and CoPilot can monitor labor market trends and predict shortages or surpluses in specific types of labor or skills by analyzing data from industry reports, economic indicators, and workforce trends. For example, it might detect an upcoming shortage of skilled tradespeople in a region due to a surge in infrastructure projects.

- » **Use Case:** Input labor market data and ChatGPT can provide forecasts on potential labor shortages or surpluses in specific regions or industries.
- » **Benefit:** Prevents project delays by enabling firms to proactively adjust recruitment strategies and subcontracting plans to mitigate labor shortages.

### USE CASE 2

ChatGPT and CoPilot can analyze large datasets from sources such as economic forecasts, demographic shifts, and government planning documents to predict future market demands. For instance, they can detect a housing demand surge in regions with rapid population growth or an increased need for healthcare facilities due to aging demographics.

- » **Use Case:** Input economic, demographic, and planning data and ChatGPT can forecast upcoming demand for various services, such as housing or healthcare.
- » **Benefit:** Helps AEC firms anticipate market opportunities, enabling proactive development of marketing and project strategies to capture emerging demands.

### USE CASE 3

ChatGPT and CoPilot can aggregate and monitor public infrastructure funding announcements, government budgets, and policy changes. By tracking where funds are allocated, such as in transportation, utilities, or public buildings, they can highlight regions where new project opportunities are likely to emerge.

- » **Use Case:** Input public budget data and infrastructure announcements and ChatGPT can identify regions with upcoming infrastructure investments.
- » **Benefit:** Enables firms to target business development efforts in regions with planned infrastructure projects gaining an edge over competitors by adjusting their strategies early.

### USE CASE 4

ChatGPT and CoPilot can continuously scan real estate and construction market data, such as property transactions, zoning changes, and building permits, to assess market trends. For example, they can identify rising property values and construction activity in emerging growth hubs.

- » **Use Case:** Input real estate transaction and construction permit data and ChatGPT can generate insights on regional market health and growth potential.
- » **Benefit:** Helps firms focus their business development efforts on high-growth markets by identifying regions with increasing construction demand.





# COMPETITIVE ANALYSIS & DIFFERENTIATION

## SWOT ANALYSIS

AI can assist in conducting a comprehensive SWOT (Strengths, Weaknesses, Opportunities, and Threats) analysis by sifting through internal and external data.

For instance, AI might analyze your firm's past projects, financial performance, and market positioning and then cross-reference this with industry trends and competitor data to identify strategic growth opportunities and potential threats.

This enables your firm to make informed decisions about where to invest resources for the best return on investment.

## COMPETITOR BENCHMARKING & GAP ANALYSIS

AI can compare your firm's market positioning against competitors by analyzing their project portfolios, market presence, and client reviews.

AI can also highlight areas where your firm may have a competitive advantage or identify gaps in your service offerings.

## COMPETITIVE INTELLIGENCE GATHERING

AI can track which competitors are pursuing or have been awarded projects listed on company websites and CIPs.

By analyzing this data, AI can help your firm understand the competitive landscape for each project including which firms are actively bidding and what strategies they might be employing. This allows your team to craft more competitive and tailored proposals.

## COMPETITIVE INTELLIGENCE & POSITIONING

AI tools can track and analyze competitors' activities, such as recent projects, partnerships, and marketing strategies, to understand how they are engaging with the same clients.

For example, if AI identifies that a competitor is focusing heavily on price, your firm might focus on emphasizing superior service quality or innovative solutions in your capture plan.

AI can then suggest strategies to differentiate your firm from competitors in the eyes of the client.





### USE CASE 1

ChatGPT and CoPilot can help conduct a comprehensive SWOT analysis by gathering internal data (such as project success) and external data (like competitor activity) to identify strategic growth opportunities.

- » **Use Case:** Input your firm's data and ChatGPT can highlight SWOT relevant to your market.
- » **Benefit:** Enables more informed decision-making and resource allocation for optimal BD outcomes.

### USE CASE 2

ChatGPT and CoPilot can assist in conducting competitive benchmarking and SWOT analysis by processing external data about competitors and internal business performance.

- » **Use Case:** Input information about competitors and ChatGPT will generate comparative analyses highlighting your firm's strengths and areas where your firm can outperform competitors.
- » **Benefit:** Identifies strategic gaps and helps your firm differentiate from competitors.

### USE CASE 3

Teams can be integrated with tools like InsideView and Owler to track competitor activities such as recent wins, announcements, or strategic moves.

- » **Use Case:** Set up automated alerts for competitor activity keeping the BD team informed of competitor moves in real time during daily huddles or strategy sessions.
- » **Benefit:** Allows your BD team to stay competitive by reacting quickly to competitor movements, ensuring you're not missing opportunities to differentiate.

### USE CASE 4

Teams allows BD professionals to collaborate on SWOT analysis documents in real time, pulling in data from various sources (market research, competitor information, and internal strengths).

- » **Use Case:** Work with your team in real time to perform SWOT analysis leveraging external data pulled into Teams to inform your strategies.
- » **Benefit:** Enhances decision-making by involving multiple stakeholders and real-time data in the SWOT analysis process.



# BUSINESS DEVELOPMENT PLANNING & METRICS

## **AUTOMATED KPI IDENTIFICATION & TRACKING**

AI can automatically identify the most relevant Key Performance Indicators (KPIs) for your business development efforts by analyzing historical data and industry benchmarks.

For example, AI might determine that metrics such as proposal win rates, client acquisition costs, and average deal size are the most critical indicators for your firm.

Once identified, AI can continuously track these KPIs in real-time providing ongoing visibility into the effectiveness of your business development strategies.

## **PREDICTIVE ANALYTICS FOR KPI FORECASTING**

AI can use PA to forecast future performance based on current and historical KPI data.

For instance, AI might predict your firm's future revenue based on current pipeline value, proposal conversion rates, and the average sales cycle length.

This forecasting capability allows your firm to anticipate challenges, adjust strategies proactively, and set realistic yet ambitious targets.

## **REAL-TIME DASHBOARD & REPORTING**

AI-driven dashboards can provide real-time insights into business development metrics, allowing your team to monitor performance and make data-driven decisions.

For instance, a dashboard might display real-time updates on client engagement metrics such as the number of client meetings, proposals submitted, and follow-up activities.

AI can also automatically generate reports that highlight trends, anomalies, and areas for improvement making it easier to keep stakeholders informed and aligned.

## **DYNAMIC BENCHMARKING & GOAL SETTING**

AI can analyze industry data and your firm's historical performance to dynamically benchmark your KPIs against competitors and industry standards.

For example, AI might show that your firm's proposal win rate is above industry average but that client acquisition costs are higher than competitors.

Based on this analysis, AI can suggest adjustments to your goals and strategies such as targeting different client segments or optimizing your proposal process.



### ROOT CAUSE ANALYSIS FOR UNDERPERFORMING METRICS

When KPIs fall short of expectations, AI can conduct a root cause analysis to identify the underlying issues.

For instance, if your firm's client retention rate declines, AI might analyze client feedback, project delivery timelines, and communication patterns to pinpoint the causes, such as delayed project delivery or insufficient follow-up.

This analysis helps your team address problems quickly and improve overall performance.

### CONTINUOUS IMPROVEMENT & AI-DRIVEN RECOMMENDATIONS

AI can provide continuous feedback and recommendations for improving business development strategies based on the analysis of KPI performance over time.

For example, if AI identifies that your firm's proposal win rate improves when certain team members are involved, it might recommend involving those individuals more frequently in proposal development.

These data-driven recommendations help ensure that your strategies evolve and improve continuously.

### USE CASE 1

ChatGPT and CoPilot can track KPIs like proposal win rates, client acquisition costs, and BD pipeline velocity, generating real-time reports.

- » **Use Case:** You can ask ChatGPT to generate summaries and insights on BD performance metrics, helping your team make data-driven decisions.
- » **Benefit:** Provides continuous, automated visibility into your BD efforts and helps optimize performance.

### USE CASE 2

ChatGPT and CoPilot can help forecast future performance based on current BD activities, pipeline value, and proposal success rates.

- » **Use Case:** Input historical BD data and ChatGPT can generate projections for future revenue, win rates, and client acquisition costs.
- » **Benefit:** Proactively adjusts strategies to align with future challenges and opportunities.





# CLIENT PROFILING & SEGMENTATION

## CLIENT DATA AGGREGATION & PROFILING

AI can gather and analyze data from multiple sources including financial records, industry reports, project histories, and social media activity to build a comprehensive profile of a potential client.

For instance, AI can evaluate factors such as the client's annual revenue, industry sector, project types, and market presence.

By comparing this data against your firm's ideal client profile, AI can determine how closely the client aligns with your preferred characteristics such as project size, industry focus, and geographic location.

## PREDICTIVE ANALYTICS FOR CLIENT COMPATIBILITY

AI can use predictive analytics to assess future compatibility with a potential client.

For instance, AI can analyze trends in the client's industry, their growth trajectory, and their past engagement with similar service providers. If the client is expanding in areas where your firm has expertise or if their upcoming projects align with your strategic goals, AI can flag a client as a high-potential match for your Ideal Client Profile.

## CLIENT PROFILING & SEGMENTATION

AI can analyze vast amounts of client data, including past interactions, project history, industry focus, and financial health, to create detailed client profiles.

For instance, AI can segment clients based on factors such as project size, frequency, and industry type.

This allows firms to tailor their capture plans to the specific needs and preferences of each client segment increasing the chances of securing contracts.

## AI-DRIVEN SCORING SYSTEMS

AI can create a scoring system that evaluates potential clients based on how well they match your ICP criteria.

For instance, the system can assign scores to various attributes like project frequency, financial stability, decision-making speed, and alignment with your firm's values. A higher score indicates a closer match to your ideal client.

This automated scoring allows your business development team to quickly identify and prioritize clients who are most likely to be a good fit.

## HISTORICAL PROJECT ANALYSIS

AI can analyze the client's historical project data such as project types, budgets, timelines, and outcomes. By comparing this information with the types of projects your firm has successfully completed in the past, AI can assess whether the client's typical projects align with your firm's capabilities and expertise. If there is a strong alignment, the client likely fits your ICP capabilities and expertise.



### CLIENT & STAKEHOLDER MAPPING

AI can map relationships between potential projects and key stakeholders, such as decision-makers and project managers, based on information from company websites and CIPs.

For instance, AI can identify which departments or executives are associated with specific projects allowing your team to target the right contacts during the pursuit phase.

This strategic insight helps in building relationships and positioning your firm for success.

### STRATEGIC PARTNER IDENTIFICATION

AI can analyze industry networks and partnerships to identify potential collaborators that align with your firm's growth strategy.

For example, AI can identify that a specific engineering firm has been involved in multiple successful projects in a new market segment your firm is targeting.

Establishing a partnership with this firm could provide access to new clients and markets, accelerating growth.

### USE CASE 1

ChatGPT and CoPilot can help build detailed client profiles by analyzing data sources such as financial records, project histories, and industry reports.

- » **Use Case:** Enter client information and ChatGPT generates profiles or suggests which clients are most aligned with your ideal client profile.
- » **Benefit:** Helps prioritize client engagement based on potential alignment with your firm's capabilities.

### USE CASE 2

Teams can aggregate client data from various CRM systems and document sources creating a unified view of client profiles, project histories, and financial data.

- » **Use Case:** Access aggregated client data within Teams during BD meetings allowing your team to quickly pull up relevant information and discuss strategies.
- » **Benefit:** Ensures BD teams have all the relevant client information available during discussions thus improving the quality of decision-making.

# CLIENT RELATIONSHIP MANAGEMENT



## NLP FOR ENHANCED COMMUNICATION

AI-driven Natural Language Processing (NLP) can be used to analyze communication patterns with clients such as emails and meeting transcripts, to identify trends, sentiments, and areas for improvement.

For instance, AI can analyze the sentiment of client communications over time, identifying potential issues early and suggesting changes in communication strategy to improve client relations.

## PREDICTIVE ANALYTICS FOR CLIENT SEGMENTATION

AI can segment clients based on historical data and predictive models, allowing firms to tailor their business development strategies and communication.

For example, AI can analyze past project data, client interactions, and economic indicators to identify which clients are likely to require new services or expansions.

This predictive insight enables firms to focus their efforts on high-potential clients, increasing the likelihood of securing new contracts.

## CLIENT RELATIONSHIP MANAGEMENT

AI-powered CRM systems can track and analyze every client interaction providing insights into client behavior, preferences, and potential dissatisfaction.

For instance, AI can flag when a client hasn't been contacted in a while, predict when a client might be considering a competitor based on engagement patterns, or suggest personalized content or services that would most likely resonate with specific clients, thereby improving client retention and satisfaction.

## PREDICTIVE ANALYTICS FOR CLIENT NEEDS

AI can predict future client needs by analyzing patterns in their past behavior, market trends, and economic indicators.

For instance, AI might forecast that a particular client will likely require services for a large infrastructure project based on their historical investment patterns and recent industry developments.

This insight enables the firm to proactively develop a tailored proposal that addresses the client's future needs before competitors do.





### **CLIENT INTERACTION & SENTIMENT ANALYSIS**

AI can analyze all interactions with a client, such as emails, meeting notes, and phone calls, to gauge their sentiment and engagement level.

For instance, if AI detects a decrease in positive sentiment or engagement from a key client, it can prompt the business development team to take corrective action such as scheduling a follow-up meeting or addressing specific concerns.

This ensures that the capture plan is adjusted in real-time based on client feedback.

### **CONTENT PERSONALIZATION**

AI can help personalize content for client presentations and proposals by analyzing what resonates most with the client.

For example, AI can suggest specific case studies, testimonials, or project examples that align with the client's industry and past preferences.

This level of personalization helps create a more compelling narrative in the capture plan, increasing the likelihood of success.

### **SOCIAL MEDIA & ONLINE PRESENCE ANALYSIS**

AI can monitor a client's social media activity, press releases, and online presence to gather insights into their priorities, challenges, and corporate culture.

This analysis helps in determining whether the client's values and focus areas are compatible with your firm's offerings.

For instance, if AI detects that a client frequently discusses sustainability initiatives and your firm specializes in green building, this alignment indicates a strong match with your Ideal Client Profile.

# CLIENT RELATIONSHIP MANAGEMENT



## USE CASE 1

ChatGPT and CoPilot can predict client needs by analyzing past interactions, market trends, and industry data.

- » **Use Case:** Ask ChatGPT to predict which clients are likely to need your services based on historical data and trends.
- » **Benefit:** Enables BD teams to engage clients proactively, increasing the chances of securing new contracts.

## USE CASE 2

Teams can integrate with AI-powered sentiment analysis tools that track the tone and content of client interactions, providing insights into their satisfaction and engagement.

- » **Use Case:** Analyze client communications and meeting transcripts to gauge client satisfaction and predict potential issues that require follow-up.
- » **Benefit:** Ensures that client concerns are addressed promptly, improving client retention and engagement.

## USE CASE 3

ChatGPT and CoPilot can monitor a client's social media activity and online presence generating insights into their priorities and business needs.

- » **Use Case:** Request social media or online presence analysis of a specific client and ChatGPT will highlight potential BD opportunities based on their activities.
- » **Benefit:** Helps craft targeted BD approaches based on a client's current focus or challenges.

## USE CASE 4

ChatGPT and CoPilot can analyze communication patterns (emails, meeting transcripts, etc.) with clients to gauge sentiment and identify potential areas for improvement.

- » **Use Case:** Upload email exchanges or meeting notes and ChatGPT will assess the tone and suggest follow-up actions based on sentiment.
- » **Benefit:** Improves client relationship management by providing actionable insights into client engagement levels.



### USE CASE 5

Fireflies.ai integrates with Teams to transcribe and analyze client meetings helping BD professionals track sentiment and key points discussed during client interactions.

- » **Use Case:** Use Fireflies.ai during client meetings to record and analyze conversations, extracting action items and sentiment analysis.
- » **Benefit:** Provides insight into client concerns and sentiment allowing teams to tailor follow-ups and adjust BD strategies.

### USE CASE 6

Teams integrates with Microsoft Power Automate to set up automated follow-up reminders after client meetings, ensuring BD teams stay on top of communications.

- » **Use Case:** Set up automated reminders to follow up with clients based on meeting discussions or project deadlines.
- » **Benefit:** Ensures no follow-up actions are missed, helping build strong client relationships and improve client retention.

### USE CASE 7

Teams can record BD meetings and automatically generate transcripts, ensuring that all key points from client or internal strategy discussions are captured.

- » **Use Case:** After client meetings or BD strategy sessions, Teams generates a transcript that can be shared with stakeholders for follow-up actions and documentation.
- » **Benefit:** Ensures important information is captured and shared, enabling smoother follow-ups and consistent communication across teams.



# PROJECT OPPORTUNITY MANAGEMENT

## **AUTOMATED WEB SCRAPING FOR PROJECT OPPORTUNITIES**

AI-powered web scraping tools can automatically scan company websites and CIP databases to extract relevant information about upcoming projects. The AI system can then compile a list of these opportunities.

For instance, AI can be programmed to search for specific keywords or phrases like “Request for Proposal (RFP),” “Capital Improvement Project,” “Infrastructure Upgrade,” or “Development Plan” on municipal or corporate websites.

For example, AI can consolidate information about various infrastructure projects across multiple cities into a unified report highlighting key details such as timelines, budgets, and responsible entities. This streamlined access to comprehensive data helps your team make informed decisions.

AI can integrate data from multiple sources, such as different municipal CIPs, company websites, and public records, into a single dashboard for analysis and reporting.

## **REAL-TIME ALERTS FOR NEW CLIENTS OR OPPORTUNITIES**

AI can continuously monitor company websites and CIP portals for updates on new projects or changes to existing ones. This real-time alerting system ensures that your team is always aware of the latest opportunities and can act quickly.

For example, if a city updates its capital improvement plan to include a new public works project, the AI system can instantly notify your business development team.

For instance, AI can monitor industry news and databases for announcements of new projects or partnerships that match your firm’s ideal client profile. When such an opportunity arises, the AI system can notify your business development team to take immediate action, ensuring you don’t miss out on potential high-fit clients.

AI can also provide real-time alerts when a new client or project opportunity aligns with your Ideal Client Profile.

## **OPPORTUNITY SCORING & PRIORITIZATION**

AI can score and prioritize potential business opportunities based on various factors such as profitability, strategic alignment, and competitive landscape.

For instance, AI can evaluate multiple potential projects and rank them based on the likelihood of success, projected ROI, and alignment with your firm’s long-term goals.

This enables your business development team to focus on the most promising opportunities, optimizing resource allocation.



### **NLP FOR DOCUMENT ANALYSIS**

Natural Language Processing (NLP) techniques can be applied to analyze large volumes of text from CIPs and company websites to identify relevant project information.

For example, AI can parse through lengthy PDF documents of capital improvement plans to extract details such as project scope, budget, timelines, and responsible departments.

NLP can also identify contextual nuances, such as priority projects or those with imminent deadlines, enabling your team to focus on high-potential opportunities.

### **PROJECT PRIORITIZATION & SCORING**

AI can assess and score potential projects based on various factors, such as budget size, strategic importance, and alignment with your firm's capabilities.

For example, AI can analyze the extracted data from CIPs to prioritize projects based on their alignment with your business development goals, such as those in sectors where your firm has specialized expertise or in geographic regions where you are looking to expand.

This scoring helps your team focus on the most promising opportunities.

### **CUSTOMIZABLE FILTERS & SEARCH CRITERIA**

AI tools can be customized with specific search criteria to filter project opportunities based on your firm's focus areas.

For instance, if your firm specializes in transportation infrastructure, AI can be set to prioritize projects related to roads, bridges, or public transit systems when scanning CIPs or company announcements.

This ensures that the opportunities identified are highly relevant to your firm's expertise.

### **REAL-TIME MARKET DYNAMICS MONITORING**

AI tools can monitor and analyze real-time data streams, such as construction permits, zoning changes, and news reports, to provide up-to-date insights into market dynamics.

For instance, AI can alert your firm to a sudden increase in permit applications for residential developments in a specific area, signaling a potential opportunity to pitch your services to developers before the market becomes crowded.

# PROJECT OPPORTUNITY MANAGEMENT

## USE CASE 1

ChatGPT and CoPilot can monitor market data, project announcements, or industry news and alert you when new opportunities arise.

- » **Use Case:** Integrate ChatGPT with project data sources (CIP databases or competitor news) and receive real-time updates about potential BD opportunities.
- » **Benefit:** Keeps your team informed about the latest opportunities and helps ensure you don't miss high-potential leads.

## USE CASE 2

ChatGPT and CoPilot can analyze and summarize large documents, such as Requests for Proposals (RFPs), to identify critical requirements and suggest a tailored response.

- » **Use Case:** Input an RFP and ChatGPT can quickly summarize the main points and suggest strategies for writing a winning proposal.
- » **Benefit:** Saves time by extracting key insights from lengthy BD-related documents.

## USE CASE 3

ChatGPT and CoPilot can be used to extract information about upcoming project opportunities from websites, databases, and industry announcements.

- » **Use Case:** Ask ChatGPT to compile and analyze project opportunities from public websites enabling your BD team to focus on high-potential projects.
- » **Benefit:** Streamlines project identification and allows your team to act on opportunities quickly.

## USE CASE 4

Teams can be connected to external data sources such as CIP databases or project monitoring tools, providing real-time alerts for new project opportunities or RFP releases.

- » **Use Case:** Configure Teams to notify your BD team when relevant new opportunities are posted, such as infrastructure projects or new client needs.
- » **Benefit:** Allows BD teams to act quickly on new opportunities ensuring timely proposal submission and follow-ups.





### USE CASE 5

By integrating Teams with predictive analytics tools, BD teams can forecast which opportunities are likely to be most successful thus helping prioritize project bids.

- » **Use Case:** Use predictive analytics to score incoming opportunities and share these insights during BD strategy meetings in Teams.
- » **Benefit:** Helps your BD team focus on high-potential opportunities, improving resource allocation and win rates.

# AI APPLICATIONS & TOOLS

## AEC PLUS TECH

- » **Description:** This tool helps you stay ahead with the latest architecture software tools, engineering automation products, and construction technology solutions.

## CRYSTAL KNOWS

- » **Description:** Crystal Knows is a platform that uses personality insights to improve communication and collaboration by providing personalized guidance for interacting with colleagues, clients, and others based on their unique personality profiles.

## HUMANLINKER

- » **Description:** Humanlinker is an AI-driven platform designed to revolutionize sales prospecting through hyper-personalization. It allows users to automate multichannel sales outreach while tailoring each interaction based on data insights like DISC personality analysis, LinkedIn activity, and other behavioral signals. By leveraging AI, Humanlinker generates personalized sales messages for emails, LinkedIn interactions, and follow-ups streamlining the process of engaging potential clients. This approach enables sales teams to significantly boost their response rates, book more meetings, and improve overall sales efficiency.

## ADOBE PODCAST

- » **Description:** This tool is designed for audio editing and enhancement, making it useful for creating polished audio content for podcasts, webinars, or marketing materials for content-driven business development.

- » **Use Case:** Ideal for creating professional BD content such as webinars or podcasts to engage clients and prospects.

## AI PRM

- » **Description:** Enhances prompting in ChatGPT helping business developers get more accurate outputs for client outreach, strategy development, or proposal writing by improving the interaction with AI models.
- » **Use Case:** Improves prompt accuracy for generating BD content, client outreach emails, or proposals.

## ANTHROPIC (CLAUDE)

- » **Description:** A competitor to ChatGPT with a prompt library that supports generating business development content including emails, reports, and presentations. It focuses on data privacy.
- » **Use Case:** Ideal for creating confidential BD proposals and content while maintaining high data privacy standards.



### CLEARBIT

- » **Description:** Helps with client data aggregation and profiling by providing comprehensive firmographic and demographic details about potential clients. It integrates with CRM tools to improve client segmentation and BD targeting.
- » **Use Case:** Aligns with AI-driven client profiling and segmentation by providing enriched client data for more targeted outreach.

### CLIPDROP

- » **Description:** A tool for removing backgrounds from images, useful in creating polished marketing or presentation materials for business development outreach and proposals.
- » **Use Case:** Enhances visual materials such as BD proposals and client presentations.

### CRIMSON HEXAGON

- » **Description:** AI-powered platform for social media sentiment analysis. It can analyze client and competitor online presence providing insights into market sentiment and emerging trends.
- » **Use Case:** Supports “Market Trends Analysis” by aggregating social media data to detect shifts in client needs and industry focus.

### DELPHI.AI

- » **Description:** This AI captures personal and organizational knowledge making it easier to leverage insights for BD, such as understanding customer data or refining strategies.
- » **Use Case:** Ideal for organizing and retrieving internal knowledge for better BD decision-making.

### DOMO

- » **Description:** A cloud-based business intelligence platform that provides real-time data visualization and reporting for KPI tracking. Domo can integrate various data sources into customizable dashboards.
- » **Use Case:** Useful for automated KPI tracking and real-time dashboard reporting in BD.

### ELEVENLABS

- » **Description:** Text-to-speech and voice creation AI that helps create audio content, voice-overs, or interactive materials for BD presentations and client pitches.
- » **Use Case:** Ideal for creating audio content for client engagement or BD presentations.



# AI APPLICATIONS & TOOLS

## FIREFLIES

- » **Description:** AI note-taking for Microsoft Teams and other platforms useful for capturing and summarizing key points in BD meetings, client calls, or strategy sessions.
- » **Use Case:** Useful for tracking conversations and capturing important notes in client or internal BD meetings.

## FREEPIK

- » **Description:** AI note-taking for Microsoft Teams and other platforms useful for capturing and summarizing key points in BD meetings, client calls, or strategy sessions.
- » **Use Case:** Useful for tracking conversations and capturing important notes in client or internal BD meetings.

## GLIF

- » **Description:** A web-based tool for manipulating images via prompts which can enhance visual marketing or client presentations in BD.
- » **Use Case:** Enhances visual materials for BD presentations or marketing content.

## GOOGLE DEEPMIND

- » **Description:** DeepMind's AI research focuses on advanced AI technologies including text-to-video capabilities which can be used for creating dynamic video content for business development.
- » **Use Case:** Can be used for generating innovative video content for BD presentations or marketing campaigns.

## HONEYBEAR.AI

- » **Description:** An AI that interacts with PDFs allowing business developers to review contracts, proposals, or client documentation efficiently.
- » **Use Case:** Ideal for analyzing and summarizing complex documents such as BD proposals or contracts.

## HUMATA.AI

- » **Description:** A multi-application AI tool that helps summarize and analyze data, conduct research, and generate insights useful for preparing business development materials.
- » **Use Case:** Improves prompt accuracy for generating BD content, client outreach emails, or proposals.



### INSIDEVIEW

- » **Description:** AI-driven platform for market intelligence and competitive analysis. InsideView helps firms stay updated on market trends, potential clients, and competitor strategies.
- » **Use Case:** Useful for “Competitive Intelligence Gathering” and “Market Potential Assessment” by delivering real-time insights into competitors and market dynamics.

### CLIPDROP

- » **Description:** A tool for removing backgrounds from images useful in creating polished marketing or presentation materials for business development outreach and proposals.
- » **Use Case:** Enhances visual materials such as BD proposals and client presentations.

### JOIST.AI

- » **Description:** A proposal software platform that simplifies the creation of BD proposals making the process faster and more efficient.
- » **Use Case:** Helps streamline proposal creation for BD teams.

### LUSHA

- » **Description:** A B2B prospecting tool that provides contact and company details. It enhances lead generation by identifying potential clients and gathering contact information quickly.
- » **Use Case:** Ideal for “Client Profiling and Segmentation” to identify high-potential clients.

### MINDY

- » **Description:** A subscription service that curates information based on email content helping business developers stay informed on industry trends or client needs.
- » **Use Case:** Curates personalized insights for BD professionals.

### MOTION

- » **Description:** An AI calendar management tool that helps with scheduling ensuring that BD professionals can efficiently manage meetings with clients and teams.
- » **Use Case:** Helps BD professionals manage time and meetings effectively.

# AI APPLICATIONS & TOOLS

## NOTEBOOKLM

- » **Description:** Google's experimental AI notebook that sources data and generates insights helping BD professionals conduct research and organize notes.
- » **Use Case:** Useful for conducting research and gathering insights for BD strategy.

## OWLER

- » **Description:** Owler provides competitive intelligence and market data on companies. It delivers news and updates on key competitors and clients including financial updates and M&A activity.
- » **Use Case:** Ideal for "Competitive Analysis" and "Competitor Benchmarking" by offering real-time updates on competitors' activities and market moves.

## PAGECRAWL

- » **Description:** An AI-driven web page crawler useful for competitor research, market analysis, and lead generation in BD.
- » **Use Case:** Ideal for monitoring competitor activity and gathering market insights.

## PERPLEXITY AI

- » **Description:** This AI tool helps with searches making it a strong alternative to Google for conducting BD research or competitor analysis.
- » **Use Case:** Ideal for real-time market research and competitor analysis in BD.

## PIPEDRIVE

- » **Description:** A CRM tool with AI-driven sales automation which helps track client interactions, manage leads, and optimize sales pipelines for BD.
- » **Use Case:** Aligns with "Client Relationship Management" and helps in monitoring client engagement and optimizing BD processes.

## POISED.COM

- » **Description:** Provides real-time feedback on voice, tone, and speech and is useful for improving client pitches and public speaking in BD.
- » **Use Case:** Helps BD professionals improve their communication and pitching skills.





### PREZI (AI-POWERED PRESENTATIONS)

- » **Description:** Prezi is a dynamic presentation tool that leverages AI to create visually compelling presentations and is useful for pitches, client presentations, and internal BD updates.
- » **Use Case:** Ideal for creating engaging BD presentations for client pitches.

### RUNWAY

- » **Description:** An AI tool for creating videos from static images which can be used to create marketing videos or presentations for BD efforts.
- » **Use Case:** Ideal for creating video content for BD marketing and client outreach.

### SALESFORCE EINSTEIN

- » **Description:** AI embedded into the Salesforce CM that provides predictive analytics, automates data entry, and helps identify the best next steps for closing deals.
- » **Use Case:** Supports “Predictive Analytics for Client Needs” and “Client Relationship Management” optimizing client interactions and sales processes.

### SANEBOX

- » **Description:** An AI tool for email management helping BD professionals stay organized by prioritizing important client and BD-related emails.
- » **Use Case:** Helps BD teams manage communication with clients efficiently.

### MY MIND

- » **Description:** An AI that organizes and retrieves personal data useful for storing and quickly accessing client data or BD insights.
- » **Use Case:** Helps BD professionals organize client data and insights.

### SKEEMA

- » **Description:** A Chrome extension that tracks website activity and creates projects and is useful for monitoring competitor websites or managing BD project activities.
- » **Use Case:** Helps BD teams track competitor websites and projects.

# AI APPLICATIONS & TOOLS

## SOURA VIDEO

- » **Description:** AI video creation tool that allows businesses to create engaging video content for marketing or BD purposes.
- » **Use Case:** Ideal for creating marketing videos to support BD efforts.

## TABLEAU

- » **Description:** A data visualization tool that integrates AI-powered analytics to create detailed reports on BD activities, trends, and performance.
- » **Use Case:** Useful for tracking BD metrics, visualizing data, and making data-driven decisions.

## TOME

- » **Description:** An AI-powered presentation tool useful for creating engaging and polished client presentations or internal BD materials.
- » **Use Case:** Ideal for creating high-quality BD presentations and reports.

## TROVE

- » **Description:** AI-driven client survey tool that helps create intuitive surveys and assists in gathering client feedback to enhance BD strategies.
- » **Use Case:** Helps collect and analyze client feedback for refining BD strategies.

## TWAIN

- » **Description:** AI for building personas which can help in creating targeted marketing campaigns or client engagement strategies in BD.
- » **Use Case:** Helps create client personas for targeted BD outreach.

## WRITESONIC

- » **Description:** AI tool with templates for writing, audio, and photo editing and is useful for creating content such as marketing materials, proposals, and BD strategies.
- » **Use Case:** Ideal for generating content for BD proposals, emails, and presentations.



### OOMINFO

- » **Description:** A B2B data provider that delivers insights into potential clients and companies enhancing BD by refining lead generation and account targeting.
- » **Use Case:** Ideal for “Client Data Aggregation & Profiling” by providing rich data about potential clients and decision-makers.