SUMMARY

Our client, a Texas-based startup, wanted to leverage years of RFP experience to streamline the manual review process using AI. With 95% of enterprise AI projects failing to deliver business value due to poor integration and rigid design, success would require embedding our AI solution within existing workflows and trusted systems, not disrupting them.

Source Allies delivered a reliable, scalable MVP while collaborating closely with non-technical stakeholders. As the client refined their goals, our team provided ongoing technical leadership to shape a product that fit how the organization already worked, reducing RFP review time dramatically and proving how GenAI can deliver value by adapting to people, not the other way around.

SOLUTION

Source Allies built an end-to-end pipeline to analyze RFPs, extract key data, and generate structured summaries. The results are automatically pushed into Salesforce and other CRMs, integrating into the client's sales workflow with minimal disruption. By modernizing and automating a traditionally manual process, the solution enabled our client to support future growth through a scalable, cloud-based architecture.

Our team operated effectively with limited technical input from stakeholders, helping translate business goals into clear product decisions. With companies increasingly favoring AI systems that quickly learn and adapt to their unique processes, we prioritized rapid iteration and evaluation. Technical evaluations confirmed that the Phoenix framework could accelerate this cycle, key to achieving the MVP's 90%+ accuracy. The MVP delivered on the client's goals and helped establish a strong foundation for future innovation.

RESULTS

15X
15x time savings processing large documents

90%+
MVP maintained 90%+ accuracy