RFP Response Generator — Quick Start Guide

1. What you can do with RFP Response Generator

- Turn a client's RFP brief into a complete, evidence-backed draft response - the first step in responding to a new business opportunity.
- Upload the client's RFP brief and automatically extract the client, region, title, and target personas. There's no manual input required however, you are able to manually edit and add context.
- The agent plans research, searches the web, and connects to internal Visa data sources to ground the response in current, credible evidence.
- Review the generated response, sources, and Assistant Steps before it goes to the client.

Export the final response as a PowerPoint or Word document.

2. Before you begin (access & prerequisites)

- Sign in with your Visa work credentials using SSO.
- Access the tool here
- Have the client's RFP brief ready to upload before you begin. Supported formats are PDF (.pdf) and Word (.doc, .docx).
- Only upload content that is the appropriate Information Classification for your intended use and complies with Visa policies. No PII or Visa Restricted content should be entered into RFP Response Generator.

3. Get started (first-time setup)

1. Open RFP Response Generator.

2. Upload the client's RFP brief.

3. Review the auto-extracted client, region, title, and target personas and edit any field before generating if needed.

4. The agent plans its research, searches the web, and connects to internal Visa data sources.

5. Review the generated RFP response, cited sources, and Assistant Steps.

6. Edit the response or request refinements as needed.

7. Export the final response.

Refinement prompts are offered so you can refine specific parts of the response without starting over.

4. How the agent builds your response

Once a brief is uploaded, the agent works through a structured process:

1. Read and parse the uploaded brief

2. Extract client, region, title, and target personas

3. Plan the research needed to respond credibly

4. Search the web for relevant external context

5. Connect to internal Visa data sources for product and program information

6. Generate a complete RFP response grounded in the gathered evidence

Assistant Steps provide transparency into how the response was generated at each stage. Typical generation time is 2–3 minutes.

6. Top Use Cases

Use Case	Description
New Business RFPs	Draft a first response to a client's RFP brief quickly
Multi-Region Pitches	Tailor language to the extracted client region
Competitive & Market Context	Incorporate current external market research into the response
Persona-Targeted Messaging	Address the target personas identified from the brief

7. Continue refining your response

After the first draft is generated, review it closely against the client's brief. Edit language directly, or use the built-in refinement prompts to refine specific parts of the response. For example, to adjust tone for a persona or add more regional context.

8. Troubleshooting and support

What if the page does not refresh or connection is lost?

Use the Refresh button or manually refresh the page in your browser.

What should I do if the generated response seems unclear or off-target?

Confirm the brief was parsed correctly and the extracted client, region, title, and personas are accurate.

If needed:

- Re-upload the brief if extraction looks incomplete or incorrect.
- Review the cited sources to confirm they align with the client's industry and region.
- Request a refinement to clarify or deepen a specific section.

The clearer and more complete the uploaded brief and supporting documents, the more relevant and client-ready the output typically becomes.

Who do I contact for help?

GDLSupportRFPResponseGenerator@visa.com