RFP RESPONSE · TEMPLATE · SAPPY BY PGC DIGITAL

Sappy-led RFP Response Template and illustrative sample

A reusable PGC Digital response, prefilled for an anonymised global industrial manufacturer. All figures are illustrative; replace every [bracketed] field per bid.



People. Possibility. Progress. · Sappy name and character: IP registration in progress

Sappy-led RFP Response — Template and illustrative sample

19 October 2026 · Prepared by Vinod Kumar Beli, Chairman and Managing Director, PGC Digital

This is PGC Digital's reusable RFP response, prefilled for an illustrative, anonymised RFP from a global industrial manufacturer that wants AI-assisted communication for business users on SAP Sales & Service Cloud V2 and SAP S/4HANA. All figures are illustrative; text in [square brackets] is replaced per bid.

How to use this template

Copy this doc for each bid, replace every [bracketed] field, and delete the sample text you do not need.

- Keep the section order: buyers score faster when the response follows their RFP.
- Replace every illustrative figure with numbers agreed with the client, or remove it.
- Do not name other clients. Describe past work as anonymised examples only.
- Do not add rates or competitor comparisons. Commercials go in the client's own pricing format.
- Sappy appears once per section at most, marking the one message that matters. Use only the approved original artwork.
- Small print for the back page: Sappy name and character: IP registration in progress.

Cover letter

[Date]

[Name], [Title] [Client legal name] [Address]

Subject: Response to RFP [reference number] — AI-assisted communication for business users on SAP

Dear [Name],

Thank you for inviting PGC Digital to respond. Every great transformation begins with a possibility, and your RFP describes a clear one: business users who spend less time searching, copying and chasing, and more time with customers.

We propose to get there in four steps, each one live and useful before the next begins. First, guided navigation, so users find the right screen, record or answer in seconds. Then AI assistance that summarises and drafts. Then a co-pilot that prepares actions in SAP Sales & Service Cloud V2 and SAP S/4HANA for one-tap approval. Finally, autonomous communication for routine, policy-bounded messages, with an audit trail, escalation to a named person and a kill switch.

Our approach is data first, AI-powered, with SAP at the core. We keep your core clean, keep your data in your tenant, and keep people in charge of every commercial decision.

You will see our mascot, Sappy, through this response. Sappy marks the one point on each page that matters most, and stands for how we work: people and possibilities brought together to create meaningful progress.

We would welcome the chance to walk you through this response in person.

Yours sincerely,



Vinod Kumar Beli, Chairman and Managing Director, PGC Digital (PradeepIT Global Consulting Limited)
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Sappy marks what matters
Four releases, each live and useful before the next begins. People keep every commercial decision.

Executive summary

We propose a four-release programme that takes your business users from guided navigation to autonomous routine communication, each release live in your SAP landscape before the next starts.

What you get

1. **Guide (R1):** Sappy asks two or three questions and takes the user to the right record, screen, report or form.
2. **Assist (R2):** answers in context, summarises documents such as customer RFPs, and drafts emails and meeting briefs. The user sends.
3. **Co-pilot (R3):** prepares the action in SAP Sales & Service Cloud V2, SAP S/4HANA, email or WhatsApp. A person approves with one tap.
4. **Autonomous within guardrails (R4):** routine, policy-bounded messages (status updates, reminders, scheduling, acknowledgements) go out on their own, logged, with escalation to a named person and a kill switch.

Why it is low-risk

- Clean core: extensions sit on SAP BTP, not in the core.
- Your data stays in your tenant, under your role-based access.
- People keep every commercial decision and every exception.
- Each release has its own go/no-go gate, measured against targets we agree with you in Discover.

Why PGC Digital

We bring SAP CX and S/4HANA delivery, Data & AI, and managed services under one team, with CMMI Level 3 and ISO 9001:2015 processes. Sappy gives your users one familiar guide across every channel.

Our understanding of your requirements

You want business users to spend their time on customers, not on finding, copying and chasing information across systems.

Current situation (as described in the RFP; replace with the client's words)

- Sales, service, order desk and finance teams work across [SAP Sales & Service Cloud V2, SAP S/4HANA, email, WhatsApp, spreadsheets].
- Users search several screens to answer one customer question, such as order status or an open invoice.
- Routine messages (confirmations, reminders, status updates) are typed by hand.
- Knowledge sits with a few experienced people.

What the RFP asks for

Ref	Requirement	Where we answer it
[R-01]	Guided navigation for business users	Solution approach, Level 1
[R-02]	AI answers and document summaries in context	Solution approach, Level 2
[R-03]	Drafting of customer communication	Solution approach, Levels 2–3
[R-04]	Actions prepared in SAP with human approval	Solution approach, Level 3
[R-05]	Autonomous routine communication with controls	Solution approach, Level 4; Guardrails
[R-06]	Data protection and auditability	Guardrails; Compliance matrix
[R-07]	Phased rollout with measurable outcomes	Delivery approach; Timeline

Users in scope: sales representatives, inside sales, customer service agents, order desk, finance and accounts receivable, and the customer's own buyers and plant contacts where the RFP includes external channels.

Solution approach

Sappy moves each user up a ladder of four levels; every level adds help without taking away human control.

The four-level ladder

Level	What Sappy does	Who acts	Example (illustrative)
1 · Guide	Asks two or three questions and opens the right record, screen, report or form	The user	An order desk user types "late order Hamburg" and lands on the open sales order
2 · Assist	Answers in context, summarises documents, drafts emails and meeting briefs	The user sends	Sappy summarises a 60-page customer RFP into requirements and open questions
3 · Co-pilot	Prepares the action in SAP, email or WhatsApp: quote follow-up, order-status reply, payment reminder, meeting invite	A person approves with one tap	Sappy drafts the order-status reply with the confirmed delivery date; the agent taps Send
4 · Autonomous within guardrails	Sends routine, policy-bounded messages on its own	Sappy, with audit trail and escalation	Shipment notifications and payment reminders inside agreed rules

Architecture in words

1. **Channels:** SAP Sales & Service Cloud V2 side panel, web portal, email, WhatsApp and [Microsoft Teams], all showing the same Sappy assistant.
2. **Experience layer:** guided-navigation flows and the assistant UI, built on SAP BTP so the SAP core stays clean.
3. **Intelligence layer:** SAP Business AI and Joule where licensed, plus [the client's approved LLM service] for summaries and drafts, grounded only on data the user is allowed to see.
4. **Agent and policy layer:** action templates, approval rules, confidence thresholds and the autonomy setting per message type.
5. **Integration layer:** SAP Integration Suite APIs and events to SAP Sales & Service Cloud V2 and SAP S/4HANA (orders, deliveries, invoices, cases).
6. **Trust layer:** identity and role-based access from [the client's IdP], logging of every prompt, draft, approval and send, and monitoring dashboards.

Guardrails

- **People own outcomes.** Prices, discounts, credit, contracts and complaints always go to a person.
- **Explainable.** Every draft shows its sources; every autonomous send records why it was allowed.
- **Data stays in your tenant.** No client data used to train public models.
- **Role-based.** Sappy only sees and says what the user is allowed to see.
- **Logged.** Full audit trail, retained per [the client's retention policy].
- **Thresholds and escalation.** Below the agreed confidence level, Sappy hands over to a named person.
- **Kill switch and opt-out.** Any message type can be switched back to approval mode at once; customers can opt out of automated messages.

Delivery approach

We deliver in five stages, and repeat Build, Run and Grow for each of the four releases.

1. **Discover:** interview each user group, map the top questions and routine messages, measure today's baseline, and agree targets and guardrails. Output: use-case backlog, baseline, signed guardrail policy.
2. **Plan:** choose the first use cases, confirm architecture and data access, and set the release gates. Output: release plan, architecture decision records, test strategy.
3. **Build:** configure flows, prompts, action templates and integrations in two-week sprints, with business users testing every sprint. Output: working release in a test tenant.
4. **Run:** go live for a pilot group, monitor quality and adoption daily, and tune. Output: go/no-go report against the agreed targets.
5. **Grow:** roll out to more users and countries, raise the autonomy level only where the data supports it, and hand over to managed services or your team. Output: scaled release, runbook, training.

Rule for moving up a level: a message type moves from Co-pilot to Autonomous only after an agreed number of approved drafts with no material edits, and with the process owner's sign-off.

Team and governance

One PGC Digital team, led by a single engagement manager, works alongside your process owners; names are confirmed at contract.

Role	Responsibility	Typical location
Engagement director	Executive sponsor, steering committee, escalations	[Onsite / remote]
Engagement manager	Plan, budget, risks, weekly status	Onsite
Solution architect (SAP CX and S/4HANA)	Architecture, clean-core decisions, integration design	Hybrid
AI architect	Grounding, prompts, guardrails, evaluation	Bengaluru delivery centre
SAP Sales & Service Cloud V2 consultant	Flows, side panel, case and quote processes	Hybrid
SAP S/4HANA order-to-cash consultant	Order, delivery and invoice data and actions	Hybrid
BTP and integration developers	Extensions, APIs, events	Bengaluru delivery centre
Change and adoption lead	Training, champions network, adoption tracking	Onsite

Role	Responsibility	Typical location
Test lead	Test strategy, AI quality evaluation, UAT	Bengaluru delivery centre

Governance

- **Weekly:** project status with your project manager and process owners.
- **Every release gate:** go/no-go review against agreed targets.
- **Monthly:** steering committee with your executive sponsor.
- **AI review board:** your process owners, IT security and our AI architect approve any change to an autonomy level.

Timeline (illustrative)

An illustrative plan reaches Release 4 in about 12 months; the real plan is set at the end of Discover.

Stage	Illustrative timing	Gate to pass
Discover and Plan	Months 1–2	Backlog, baseline and guardrail policy signed
R1 · Guide	Months 2–4	Pilot users find answers faster than baseline
R2 · Assist	Months 4–6	Draft and summary quality meets the agreed bar
R3 · Co-pilot	Months 6–9	Approved drafts sent with few or no edits
R4 · Autonomous within guardrails	Months 9–12	Process owner sign-off per message type
Grow and hand-over	From month 12	Runbook, training and support model live

Assumptions and risks

The plan holds if your licences, data access and process owners are in place by the end of Discover.

Assumptions

- You hold, or will procure, the SAP Sales & Service Cloud V2, SAP S/4HANA, SAP BTP and AI licences the chosen use cases need.
- Test and production tenants are available, with API access to order, delivery, invoice and case data.
- Each user group names a process owner who can approve flows and autonomy levels.
- Master data quality (customers, contacts, materials) is good enough for the pilot scope, or a clean-up is added to scope.
- Your security team reviews and approves the guardrail policy within [x] weeks.
- [Languages, countries and channels in scope.]

Risks

Risk	Effect	Mitigation
Poor master data	Wrong answers erode trust	Data checks in Discover; Sappy shows sources; clean-up sprint if needed
Low adoption	Benefits not realised	Champions per team, in-flow help, adoption dashboard
AI gives a wrong or unsuitable answer	Customer impact	Grounding on approved data, thresholds, human approval until proven
Licence or tenant delays	Release slips	Confirm in Discover; plan around available services
Scope creep across channels	Cost and time grow	One channel per release; change control
Regulatory or works-council review	Rollout paused	Engage early; keep logs and opt-outs

Compliance matrix

Every RFP requirement maps to a response and a fit rating; replace the sample rows with the client's own numbering.

Fit: **Full** = delivered as described; **Configured** = delivered with configuration or extension; **Phased** = delivered in a later release; **Client** = depends on a client decision or licence.

Ref	Requirement	Our response	Fit
[R-01]	Guided navigation to records, screens and forms	Level 1 flows in the SAP Sales & Service Cloud V2 side panel and portal	Configured
[R-02]	Answers grounded on SAP data	Level 2 assistant grounded on role-permitted SAP data, with sources shown	Configured
[R-03]	Document summarisation (e.g. customer RFPs)	Level 2 summary into requirements, risks and open questions	Configured
[R-04]	Drafting of customer emails and messages	Level 2 drafts; user edits and sends	Configured
[R-05]	Actions prepared in SAP with approval	Level 3 action templates with one-tap approval	Phased (R3)
[R-06]	Autonomous routine messages	Level 4 per message type, after sign-off	Phased (R4)
[R-07]	Human escalation	Confidence thresholds route to a named person	Full

Ref	Requirement	Our response	Fit
[R-08]	Audit trail	Every prompt, draft, approval and send logged	Full
[R-09]	Role-based access	Uses the client's IdP and SAP roles	Full
[R-10]	Data residency	Data stays in the client's tenant and region	Client
[R-11]	Multilingual support	[Languages] confirmed in Discover	Client
[R-12]	Clean core	Extensions on SAP BTP; no core modification	Full
[R-13]	Kill switch and opt-out	Per message type and per customer	Full
[R-14]	Adoption and training	Champions, in-flow help, role-based training	Full

Commercials (placeholder)

Commercials are submitted separately in the client's pricing format; this section holds structure only.

- **Engagement model:** [fixed price per release / time and material / managed service after go-live].
- **Price schedule:** [see separate commercial submission, reference ___].
- **Payment milestones:** [aligned to release gates].
- **Validity:** [x] days from submission.
- **Licences:** SAP and AI service licences are [procured by the client / quoted separately].
- **Exclusions:** [hardware, third-party licences, travel outside ___].

About PGC Digital

PGC Digital is the brand of PradeepIT Global Consulting Limited, founded in Bengaluru in 2016 and a public limited company since July 31, 2026.

- **Vision:** to become a globally trusted technology transformation partner, helping enterprises build intelligent, scalable and future-ready businesses.
- **Mission:** to combine enterprise technology, data, AI and skilled talent to solve complex business challenges, deliver measurable outcomes and build long-term value.
- **Capabilities:** Enterprise Technology; Data & AI; Managed & Technology Services.

- **Business areas:** Data & AI; Enterprise Applications & ERP (SAP, Microsoft Dynamics 365); Cloud & Digital Transformation; IT Infrastructure & Technology Consulting; Talent & Recruitment Services; IT-Enabled Services.
- **Engagement models:** consulting and implementation; time and material; resource augmentation; managed services; application support and maintenance; fixed price; technology-enabled business services.
- **Presence:** headquarters and principal delivery centre at No. 208, 2nd Floor, Brigade Gardens, 19 Church Street, Bangalore 560001; subsidiaries in Singapore and the USA.
- **Certifications and recognition:** CMMI Level 3; ISO 9001:2015; Great Place to Work® Certified (Dec 2025–Dec 2026); India's Best Workplaces for Women 2024; Millennium Brilliance Awards 2025, Fastest Growing IT Solutions Company of the Year (Bengaluru). SAP partner.

Why Sappy

Sappy gives your users one familiar guide across every touchpoint, so help looks and sounds the same wherever they ask.

Sappy is PGC Digital's hero mascot: the spirit of possibility. Sappy stands for intelligence, ambition, collaboration and progress, and for our journey from India to the world. White for clarity, gold for ambition, and the "P" on the chest for People, Possibility, Progress.

- **One experience:** the same Sappy on the website, WhatsApp, email, proposals, the project portal and in your SAP side panel.
- **Plain words:** Sappy explains in business language, not system language.
- **Easier adoption:** a friendly, recognisable guide lowers the barrier for first-time users.

Sappy by PGC Digital — People. Possibility. Progress.

Appendix

A. Glossary

Term	Meaning
Guided navigation	Short question flows that take a user to the right place
Grounding	Limiting AI answers to approved, role-permitted data
Co-pilot	AI prepares an action; a person approves it
Autonomous within guardrails	AI sends routine messages on its own, within agreed rules, logged and reversible
Clean core	Keeping SAP standard; extensions sit on SAP BTP
Kill switch	One control that returns a message type to approval mode

B. Attachments to include per bid

- [ ] Signed RFP forms and declarations
- [ ] Compliance matrix in the client's format
- [ ] Commercial submission
- [ ] Certificates: CMMI Level 3, ISO 9001:2015
- [ ] Anonymised project examples (no client names)
- [ ] Team CVs (on request)
- [ ] Draft guardrail policy

C. Contact

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Sappy name and character: IP registration in progress. All figures in this sample are illustrative.

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Since 2016, headquartered in Bengaluru, PGC Digital connects SAP, supply chain, finance and customer data into a governed enterprise foundation — turning it into trusted decisions, production-ready AI agents and business outcomes, powered by the talent to deliver and operate at scale.

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