

Case Study

**Fifth Third's sales team builds 100 proposals and presentations monthly with Qvidian.**



## INDUSTRY

**Financial Services**

## COMPANY

**Fifth Third Bank**  
Cincinnati, Ohio  
53.com

Fifth Third operates four main businesses: commercial banking, branch banking, wealth and asset management, and consumer lending. As one of the largest money managers in the Midwest, the company runs over 1,200 banking centers and nearly 2,500 ATMs in ten states.



**FIFTH THIRD BANK**

**Fifth Third Bank** has relied on Upland Software's Qvidian product for over 12 years. With Qvidian, Fifth Third keeps 20,000+ content records in accordance with strict compliance requirements and enables its sales team to create 100 self-service proposals and presentations monthly. Fifth Third customizes content access by role to enhance security and remove clutter, so users can quickly find current, approved content.

# How do you keep 20K+ content records in-line with compliance requirements?

## **Fifth Third needed a secure way to distribute approved content.**

Fifth Third, a leading money manager in the Midwest, wanted to grow while maintaining agility and controlling costs. The company first began working with Qvidian in 2008. At the time, Fifth Third's salespeople were developing their own proposals using different information sources, varying processes, and inconsistent messaging. As a crucial component in capturing new business, Fifth Third wanted to streamline its sales proposal process and ensure its salespeople could always find the most relevant content.

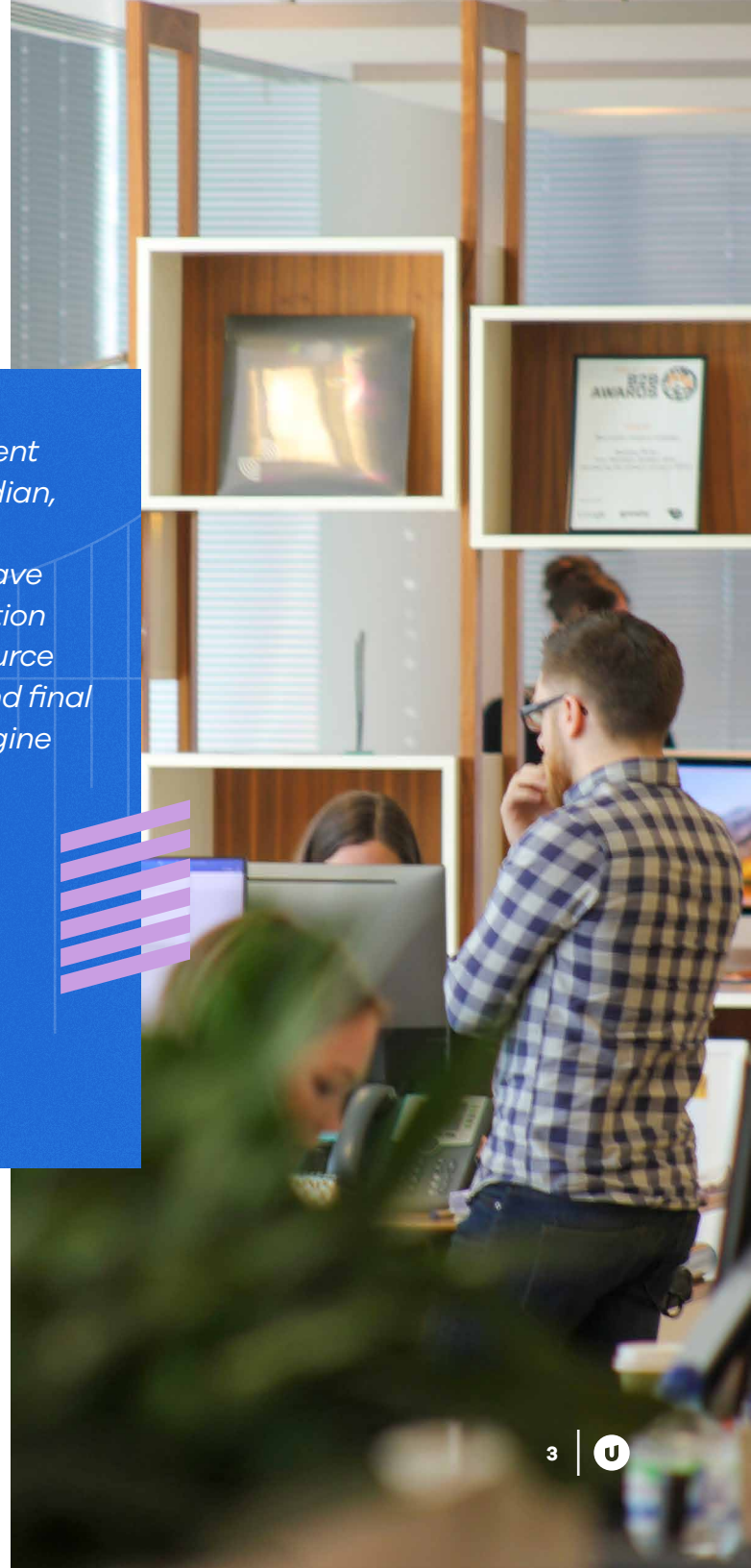
## **Qvidian's popularity sparked interest and drove adoption company-wide.**

During implementation, Qvidian guided key Fifth Third users in building a central proposal content library. When word got out about having a one-stop-shop for approved content, teams across the company began requesting access. To simplify accessibility, Fifth Third defined which content users could see by role.

"Salesperson A only sees what is relevant to Salesperson A. They feel like this entire tool exists for them," said Barry Longhauser, Sales Resource Center Manager. "Now, people are getting better search results and finding what they need quickly."

*"Maintaining our content is easy now. With Qvidian, we're able to manage version control and have a central documentation repository to store source documents, drafts, and final copies. I couldn't imagine doing my job without Qvidian."*

**– Amanda Peck**  
Knowledge Manager  
Fifth Third Bank



# With Qvidian, Fifth Third increased sales productivity while dramatically reducing risk.

## Fifth Third centralizes approved sales and proposal content and makes content audits stress-free.

Fifth Third's sales team now uses Qvidian to create proactive proposals, presentations, and RFP responses, with at least 75% of licensed users accessing the software monthly. The team reports considerable time savings as compared to their legacy manual methods.

Qvidian also helped renew confidence in Fifth Third's available content. "Qvidian fosters trust by letting our colleagues know that their documents are up-to-date. They always know they're using the right version and when the information was last reviewed and approved," said Amanda Peck, Knowledge Manager.

Qvidian's document tracking also simplifies audits. "Before Qvidian, audits could be cumbersome," Peck said. "Trying to locate the most recent versions of documents in different locations wasn't easy. Now, we have a centralized source of truth and know that we have a complete and accurate record of all assets."

## With Qvidian, Fifth Third eliminates security risks and powers business expansion.

What started as a place to store approved proposal content has grown into much more. Fifth Third has enlisted subject matter experts (SMEs) from throughout the organization to support maintaining a vast library of approved self-service content.

Notably, account managers use Qvidian to locate product onboarding documents and user guides for customers. Fifth Third also started using Qvidian to build custom contracts.

"Before, the product team had documents stored on a shared drive," said Jim Cunningham, Product Knowledge Manager. "There was risk associated with having legal documents floating around in an editable format. Now everything is secure, and our legal department is thrilled."

Fifth Third's monthly content downloads alone are up 375% (from about 200 downloads per month to 7,500). "Our Qvidian engagement is off the charts," said Longhauser. "It's essential to continuing to grow our business."

## Results for Fifth Third Bank

**15-20k**

**content records**

uploaded, downloaded,  
and edited monthly

**100+**

**proposals and  
presentations**

created monthly

**75%**

**of licensed users**

access Qvidian at  
least monthly

**Upland Qvidian** automates away the tedious and frustrating in RFP response and proposal processes. With Qvidian, sales and proposal teams can collaborate effortlessly to quickly deliver polished and compliant proposals, presentations, and sales documents. With an unmatched 25 years of experience, more than 1,000 companies and 200,000 users worldwide rely on Qvidian to meet deadlines, tame proposal content chaos, and win more deals.