Inspiration

So this is the part of the case study where we tell you how a client had a problem, and go on to detail how we swooped in and saved the day for them. The real problem: this particular client didn't have a big problem. And actually, we didn't save the day.

This is a story about a smart client, and how he took his company from good to great. **The organization used our tools, but they solved the problem themselves.** As a sizable global company serving Information and Communications Technology (ICT) customers worldwide, much of what they did might not work exactly for you. But we're a company that believes our customers are empowered to do amazing things with our tools, and hopefully one client's story sparks some ideas for you.

An Enormous Task

When our client set out on this journey, his team was outnumbered by its constituents in sales and professional services by a ratio of about 500:1. Addressing every RFP and bidding need coming through the door of this multinational firm in the ICT industry was impossible. But leaving their collaborators with no support was unacceptable. To address enormous needs, the team basically open-sourced

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their Qvidian system. They equipped thousands of colleagues with licenses and access to draw from carefully curated content to "automagically" build sales documents.

"We opened Qvidian up to our business. It's available for anyone to use within the firm," said our key contact, who remains nameless for all the usual reasons. "The power of the platform ought to be distributed around the business, not just kept within the proposal shop.

If sales professionals or services consultants have a deal that falls outside my team's hands-on bid management model but is still deserving of high-quality, client-focused sales collateral, why not empower them with the same tools we use in our role as Bid Managers and coach them through that?"

> **We used the power of the technology to drive a neat combination of boilerplate, blended and bespoke content and enable our sales professionals to deliver personalized and persuasively structured proposals on time and with the highest quality.**

The team reinvented how they used Qvidian to produce an automated approach to creating model documents. They found much of the content could be covered with boilerplates. But those only worked if they included smaller pieces of personalized content that kept the content from feeling canned. Sales professionals accessing the system choose parameters like client type, pain points, and industry in Qvidian's document builder. Then the system builds a document to those specifications. Granular content, sometimes no more than a sentence long, provides transitions and the perspectives unique to the client's needs.

"If we took a more traditional approach to content development, we'd have to maintain thousands of standalone, feature-function oriented product templates. That's not practical, or where I wanted to be in terms of client focus. Here, we craft and curate hundreds of smaller pieces of content to achieve a better, benefit-oriented result that is focused on customer outcomes," says our contact. "We used the power of the technology to drive a neat combination of boilerplate, blended and bespoke content and enable our sales professionals to deliver personalized and persuasively structured proposals on time and with the

highest quality. The metrics were hit, and we saw the pipeline increase with qualified deals coming through."

Pro-Tip

Sales people, don't write!

"Sales professionals are not the best proposal writers and proposal writing is not the best use of their time," said our key contact. "They shouldn't be chained to a desk figuring out what to write. Sales should be out there selling."

Keeping sales out selling meant guiding sales professionals to focus on critical proposal sections that must reflect their unique knowledge of each client. In between the boilerplate and blended content derived from the system's input parameters, sales people are quickly focused on creating a few small passages of bespoke content that need truly custom writing.

This approach in particular fueled the organization's move toward proactive proposals. With preliminary information, sales could whip up sophisticated documents that move conversations ahead – and do it faster and with more depth than competitors.

Staying in front of their clients' needs helps this organization be more successful and efficient. Sales teams appreciate easy access to high quality content that fills their pipelines with constant conversation advancement. It's built a critical mass of credibility for the small team who made it happen.

Getting it done

Typically these case studies wrap up with some great result. At this company, thousands of sales professionals use this system, and each one creates multiple proposals with it. It's impressive, but it's not helpful to the majority of those of you reading this who have far fewer sales people – or just people, period.

We empower thousands of our colleagues to create personalized and persuasively structured documents that FOCUS FIRST on customer outcomes, not product.

You want to know how you can do something like this, right? Here's what we think this clever client did, and is easy to replicate to drive results for companies that are a fraction of its size.

- **"Write it once, read it many."**
  Our key contact is adamant about making Qvidian the organization's record of reference. His team focused mercilessly on building the initial content, and making it configurable. "We empower thousands of our colleagues to create personalized and persuasively structured documents that focus first on customer outcomes, not product. Crucially, our user community is shielded from the sophisticated and deeply granular approach we have developed because of the automation the Qvidian system offers. They build proposals that are crisply written, packed full of best practices, and all completed with a few mouse clicks," he said. Getting there required a focus on the long-game with about 18 months of intensive focus on honing the strategy and crafting the content. But that process took place over four years ago, and it continues to pay off today.

- **"Orchestrate content with templates and the right blend of customization."**
  This organization cites the Qvidian document

builder as a critical function to create templates that guide sales people toward the right messaging. "We approached content development from both 'logical' and 'creative' perspectives, the latter being far more successful. Using the logical approach, we modeled content using spreadsheets to capture the essence of what we were creating. This, however, was difficult to communicate and hard for our collaborators to visualize," he says.

"So, we took a creative approach, using documents to illustrate the structure and flow of our boilerplate, blended and bespoke narrative combined with carefully crafted segue textware to connect all three content types. Honestly, it was hard. But the end certainly justified the means!"

Rather than building from blocks, sales gets crisp, client-focused document with coaching tips on how and what to write, like a very sophisticated fill-in-the-blank questionnaire. As the approach has matured, it's expanded to extend beyond RFPs and proposals to include SOWs, letters and even presentation files.

- **"Redefine the metrics of success from time to quality"**
  "Am I successful when I have no library content past its expiration date? Or when I know sales people are putting that content to good use and retiring quota? I'd argue the latter," said our contact. It's driven a focus on designing content to work in configuration, and think more strategically about use than timeliness.

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Qvidian is the premier provider of cloud-based RFP and proposal automation software, helping more than 1000 companies worldwide win more business with better processes, improved productivity and more effective sales documents. Qvidian offers the only proposal automation solution fit for an enterprise, offering security, compliance and simplicity at scale. Passionate about helping clients build persuasive sales content and win more business, Qvidian also offers expert advisory services and community building opportunities to its global client base.

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