

Upland's Qvidian Delivers Impressive ROI at Rehmann

Rehmann's core belief is that their customers' experiences with them are just as important as the services they provide. The act of consistently putting customers first is the driving force behind the company's identity. What began in 1941 as a single, Saginaw-based accounting firm has evolved into a collection of business services with a common mission: to provide valuable business solutions. With 800 associates in 19 offices located in Michigan, Ohio, Florida and Indiana, Rehmann has grown to become one of the largest CPA, business-consulting, and financial advising firms in the Midwest .

Business Driver

In order to live up to that identity, Rehmann realized they needed to look for a way to build consistency, accuracy, and speed into their proposal development activities. After several mergers, Rehmann had grown to encompass 19 offices where more than 400 proposals are prepared each year. As they continued to expand, it became increasingly clear that they could not continue to build proposals the way they always had. Until recently, these proposals were office-specific, and did not always reflect corporate standards for branding, content, or accountability. Furthermore, the fragmented approach to proposal preparation was inefficient, with business advisers preparing their own proposals, rather than spending their high-value time on more business-critical activities. Caring so much about their clients, they also sought a way to make their proposals client-focused and personalized while building customer confidence with a clear and consistent message.

Approach

Like other corporations that have grown by merger, Rehmann found itself with a disparate approach to proposal creation; offices that had been affiliated with a different parent corporation tended to retain their original processes. Although logos and graphics may have been updated to reflect Rehmann ownership, content, branding messages, and overall presentation often failed to be consistent. "We realized that the underlying reason we had these problems was the fact that we did not have a single repository of approved content, or pre-approved proposal formats," said Cheri Reid, Rehmann's Proposal Manager. "So, we set up an internal committee to consider various solution options."



With Qvidian, Rehmann has now achieved:

- 30% Increase in Time Efficiency
- Personalized, Customized Proposals
- Consistent Branding and Messaging
- 54% Labor Cost Savings

“Overall we spend about 20 percent less time on proposals. However, our business advisers spend 54 percent less time, an ROI that far exceeds our annual costs for the solution.”

– Cheri Reid
Proposal Manager, Rehmann

“We first looked at using Microsoft Excel and Word,” she continued, “but quickly realized that with the volume of our content, no powerful search capability, and no tools that would facilitate personalization, this approach would not work for us. Yet, we knew we wanted to rely on Microsoft Word because everyone is familiar with the application, and it simplifies editing.”

After more market research, Rehmann discovered Qvidian’s software solutions. “By leveraging Word,” Reid remarked, “Qvidian delivers exactly what we need; a project approach that ensures accountability, a powerful search feature that lets us quickly identify the content we need, and the ability to establish pre-approved proposal templates.”

Results

Since implementing Qvidian, Rehmann has reaped sizable benefits from their solution. “When comparing our pre-Qvidian proposal creation days, to our current Qvidian environment, overall we spend about 20 percent less time on proposals,” Reid stated. “But our business advisers spend 54 percent less time, an ROI that far exceeds our annual costs for the solution.”

Rehmann achieved these savings by creating a centralized repository of approved content that is categorized by target industry and service offering. Business advisers can direct proposal administrators to the specific areas of content required for any given proposal by completing industry/service-specific checklists. This process takes less than five minutes.

Armed with these checklists, administrators use Qvidian’s Google-like search feature to quickly identify the content required, and load that content into a pre-approved industry-specific proposal template that includes a tailored cover letter and firm overview. A solid first draft proposal can be produced in less than 15 minutes.

About Upland Software

Upland Software [Nasdaq: UPLD] is a leading provider of cloud-based Enterprise Work Management software. Our family of applications enables users to manage their projects, professional workforce and IT investments; automate document-intensive business processes; and effectively engage with their customers, prospects and community via the web and mobile technologies. With more than 4,000 customers and over 450,000 users around the world, Upland Software solutions help customers run their operations smoothly, adapt to change quickly, and achieve better results every day.

“This first draft process is so fast and efficient, and the proposal is so good, that business advisers can now use it to drive a meeting with a prospect,” Reid commented. “Then, based upon inputs from the prospect, a final version can be customized and out the door – fully formatted with the consistent branding and presentation standards – in less than one hour. But it wasn’t just the Qvidian software that enabled us to achieve this success,” Reid continued. “It was also the outstanding support from Qvidian that helped us determine the best way to meet our needs with their solution. With their assistance, we have extended the reach of Qvidian to new target industries and new service offerings.”

Rehmann is comprised of Rehmann Robson, Rehmann Financial, and Rehmann Corporate Investigative Services. These entities form a synergistic collection of business services that meet the diverse needs of their clients. Through these divisions, they offer services in the areas of tax, accounting, assurance, business consulting, wealth management and corporate investigative services. Rehmann is also an independent member of Nexia International enabling them to provide a global approach for their clients.

Get to Know Upland Qvidian

We help more than 1,000 companies and 200,000 users worldwide win more business with better processes, improved productivity and more effective sales documents via our cloud-based, RFP and proposal automation software. Qvidian is the only RFP and proposal automation solution fit for an enterprise, offering simplicity, security and compliance at scale.