

Case Study

**Rehmann creates proposals 20% faster and sees a rapid ROI after selecting Qvidian.**



**INDUSTRY**  
**Financial Services**

**COMPANY**  
**Rehmann**  
**Troy, MI**  
**rehmann.com**

Rehmann is a fully integrated financial services firm of CPAs and consultants, wealth advisors, and corporate investigators. The company is ranked as one of the top 40 largest firms in the United States, with over 900 associates in Michigan, Ohio, and Florida.

**Rehmann**  
EMPOWER YOUR PURPOSE

**Rehmann** creates 400+ proposals per year with Upland Software's Qvidian product. After a series of mergers, Rehmann selected Qvidian to standardize and secure its proposal process across 19 offices. With Qvidian, Rehmann builds drafts in as little as 15 minutes and delivers final proposals at least 20% faster than its legacy manual methods. The labor cost savings alone helped Rehmann see a rapid return on investment.



# After several mergers, how do you get 19 offices to use one proposal process?

## Rehmann needed to adopt one standard, compliant proposal process.

Following multiple mergers, Rehmann had grown into one of the top 40 largest financial services firms in the U.S., with 19 offices that prepared more than 400 proposals annually. Proposals were office-specific and did not always reflect corporate branding standards. This fragmented approach also left high-value Business Advisers preparing their own proposals, instead of focusing on business-critical activities. Rehmann needed a way to build consistency, accuracy, and speed into its proposal process.

## Qvidian's seamless integration with Microsoft Word won the team over.

Rehmann initially struggled to unify its proposal processes. "We had problems mostly because we didn't have a single content repository," said Cheri Reid, Proposal Manager. The company considered using Microsoft Word because the team was familiar with the application but determined it could not meet their needs on its own.

After more research, Rehmann found Qvidian and was impressed by its Word integration. "By leveraging Word, Qvidian delivers an approach that ensures accountability, powerful searching, and the ability to establish approved proposal templates."

*"Overall, we spend about 20% less time on proposals. However, our Business Advisors spend about 54% less time—an ROI that far exceeds the annual cost for the software."*

**- Cheri Reid**  
Proposal Manager, Rehmann



# With Qvidian, Rehmann built accurate proposals rapidly while decreasing labor costs.

## Rehmann delivers tailored, customer-centric proposals in a fraction of the time.

Since implementing Qvidian, Rehmann has reaped sizable benefits by creating a central repository of approved content categorized by target industry and service offering. "When comparing our pre-Qvidian proposal creation days to our current Qvidian environment, overall, we spend about 20% less time on proposals," Reid said. "However, our Business Advisers spend 54% less time—an ROI that far exceeds our annual costs for the software."

Now, a Business Adviser can recommend what content types to use in a proposal in less than five minutes by filling out a brief checklist. Armed with a completed

checklist, Rehmann's admins then surface the most relevant information for the opportunity from their Qvidian library and insert it into an approved, industry-specific proposal template.

## With Qvidian, Rehmann goes from first draft to final proposal in as little as an hour.

With Qvidian, Rehmann can create solid first drafts in less than 15 minutes and then personalize its proposals to focus on each customers' unique needs with targeted and compelling messaging.

"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 said. "Based on a prospect's inputs, a final version can be customized and out the door—fully formatted with consistent branding and presentation standards—in less than an hour."

Reid went on to explain that Qvidian was much more than just software for Rehmann. "It was also the outstanding support from Qvidian that helped us determine the best way to meet our needs. With their assistance, we have extended the reach of Qvidian to new target industries and new service offerings."

## Results for Rehmann

**50%**  
**labor savings**  
for high value  
Business Advisers

**20%**  
**faster proposals**  
an average for 400  
proposals annually

**15 minute**  
**proposal drafts**  
so experts can focus  
on customization

**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.