



THE QVIDIAN EDGE: SUCCESS DECODED

Enabling cross-team alignment with a modern proposal automation operation.

PROFESSIONAL SERVICES | TRANSFORMATION STORY



INDUSTRY

Professional Services

COMPANY

Multi-practice professional services organization

ESSENTIAL SALES DOCS

Requests for information (RFIs)

Requests for Proposals (RFPs)

Proposals

Security questionnaires

Contract-related documents

This large, multi-practice professional service organization delivers solutions across consulting, talent services, engineering, customer experience, and international business units. Their teams handle a high volume of RFPs, RFIs, proposals, security questionnaires, and other contract-related documents.



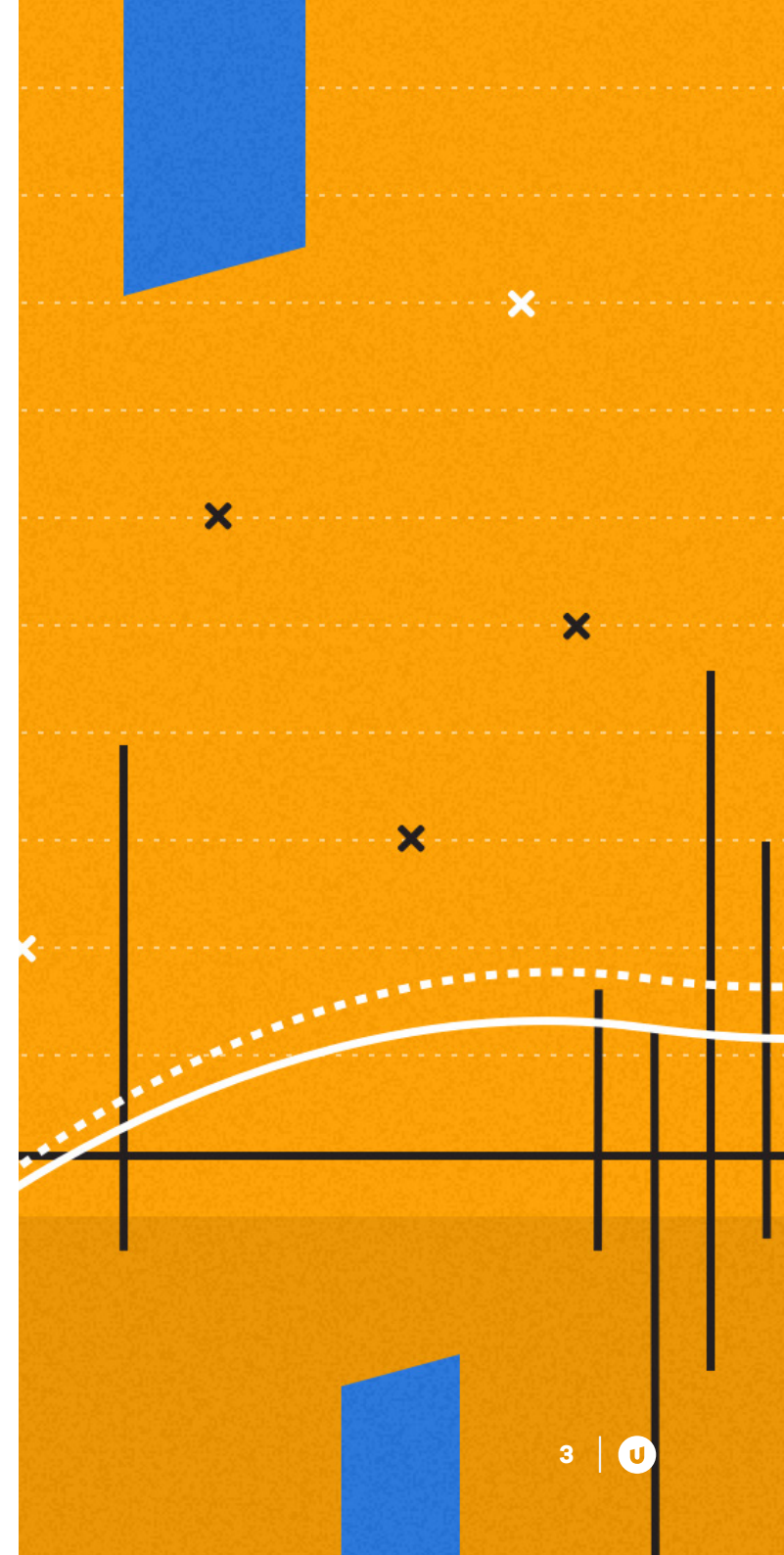
How can one company build a unified and modern sales document process that saves time and effort?

A legacy and highly manual system needed a modern and centralized approach

Like many other organizations, this company found that as they grew their content repositories became fragmented and prone to errors. Content was stored across SharePoint, local drives, prior response management platforms, and in some extreme cases, individual libraries! Duplicate or outdated material reigned supreme, leading to inconsistent documentation and long hours spent searching for prior answers or recreating content from scratch.

To make things even more challenging only one admin had access to the entire library and each practice maintained a siloed library without a streamlined way to share content or learn from other groups RFP responses.

This left writers incapable of updating content, managing templates, or correcting styles. As a result, response times increased, styles broke down, and the company struggled with inconsistent and inaccurate information that required frequent reworking.



Enter Qvidian's structured, modern, and superior solution to proposal automation.

These core requirements were critical: central, easy-to-find content, automation, AI, and comprehensive support. Qvidian delivered

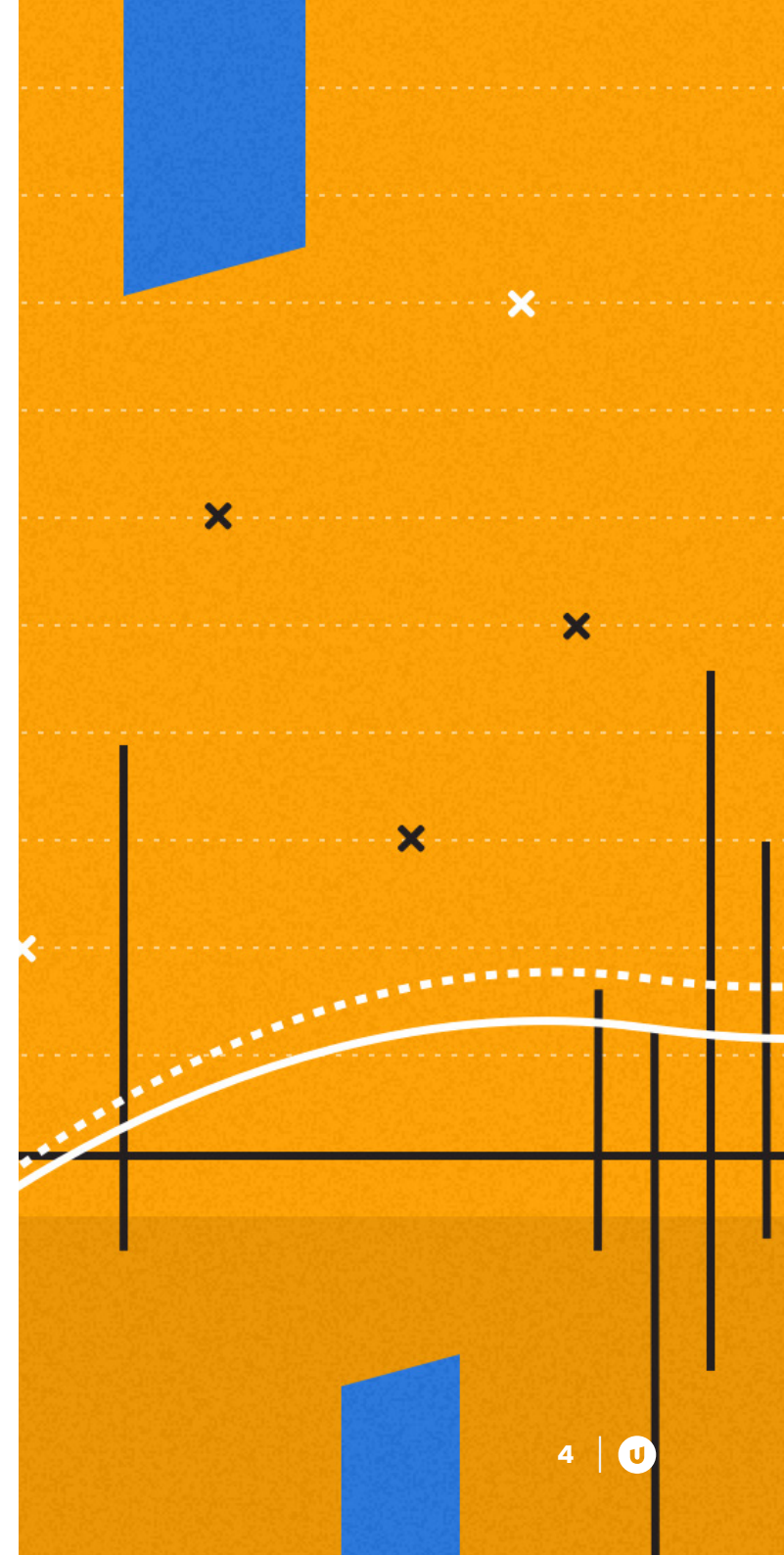
To help tame their manual chaos, we were tasked with a clear set of requirements needed by our customer to produce a truly modernized proposal operation.

- A unified, governed content library
- Automation for proposal assembly
- A scalable permissions model
- A modern search experience
- AI powered content assistance
- Migration and content cleanup tools
- Training and advanced architecture support
- Real-time analytics & reporting

Qvidian delivered on every requirement. We started with our central content library that now serves as their trusted source of truth for all RFI, RFP, and proposal content and. Using role-based permissions, metadata, learned terms, and custom fields we consolidated content, improved searchability, and enforced accuracy across all their practices.

But, we didn't stop there. Next, we used our knowledgeable team of industry experts to help with content migration, content cleanup, and providing helpful training and advanced architecture support.

With content and templates in place, this company could now focus on automating their responses. They took advantage of Qvidian's AutoFill to easily find content from their library and used our answer suggestion features to crunch the metadata, learned terms, and past usage and find the best content for each response.



With Qvidian, true organizational transformation was made possible

If that sounds like a lot, it's because it was! With Qvidian this company was able to completely transform their fragmented and manually-driven proposal environment into a centralized, automated, AI supported operation.

With a governed content library, robust automation, AI assistance, scalable permissions, and consistent templates, the company now produces faster, more accurate, and more professional sales documents. Collaboration across practices has increased, template issues have been resolved, and the business is positioned to scale Qvidian across more departments—unlocking even greater operational efficiency.

Results for this company

- Significant reduction in response time for RFPs and questionnaires
- Improved content integrity and governance, eliminating duplicate or outdated answers
- Consistent branding and formatting across all practices
- Higher adoption across practices, enabling cross team learning and reuse
- Automated build process reduces formatting effort and human error
- Better collaboration & accountability through workflows and assignments
- Improved ability to scale to hundreds or thousands of additional users across the enterprise

From proactive proposals and presentations to complex RFPs, DDQs, and SOWs, Qvidian gives teams the structure, automation, and visibility they need to make work meaningful. With an unmatched nearly 50 years of experience our customers trust in Qvidian to support their full range of content, drive revenue, and build trust.

