

Case Study

UPMC Insurance Services Division launches an efficient, scalable proposal process.



INDUSTRY
Insurance

COMPANY
**UPMC Insurance
Services Division**

Pittsburg, PA

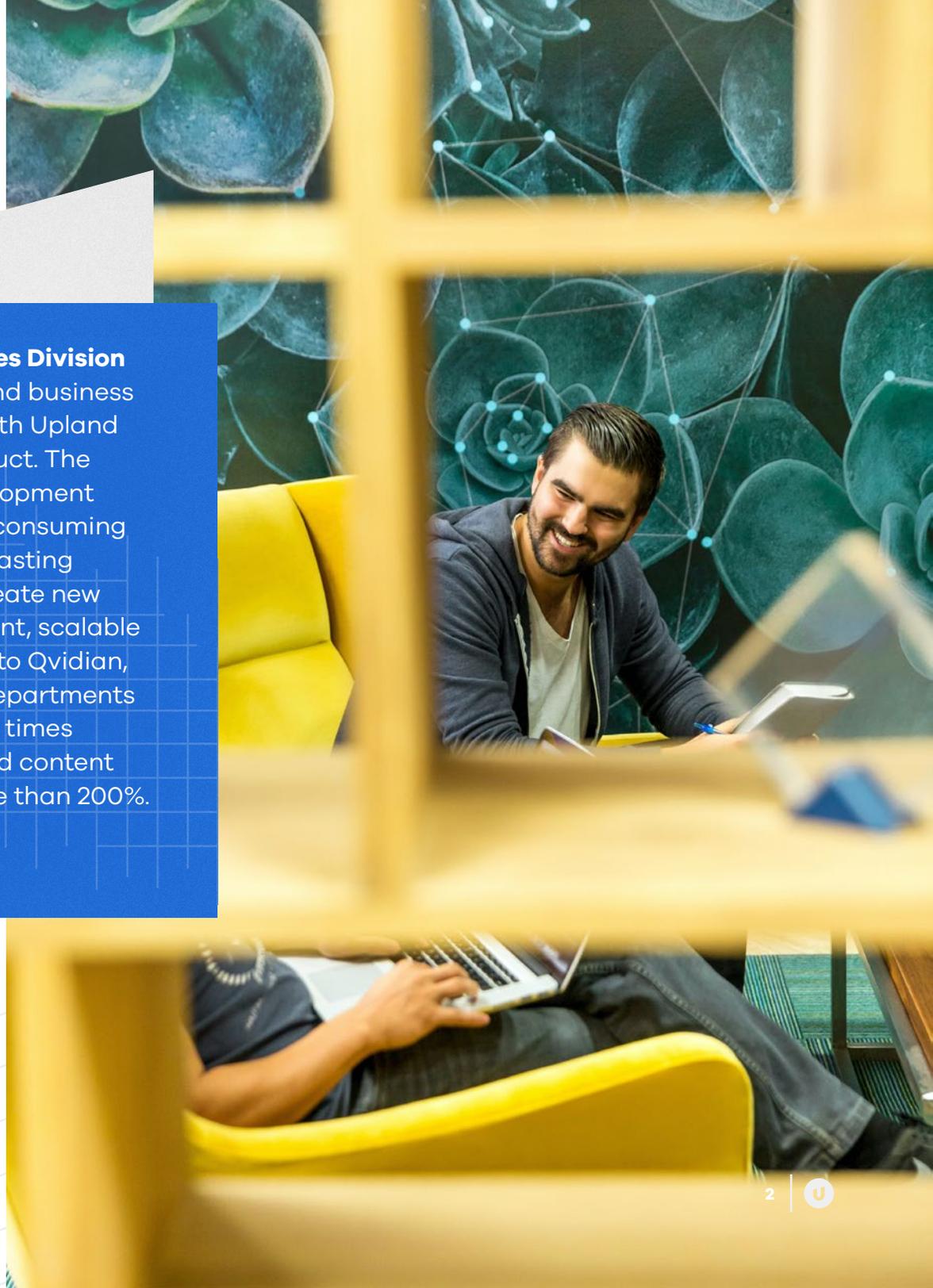
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UPMC, a world-class academic hospital system with a comprehensive clinical delivery system, and UPMC Insurance Services Division, a multifaceted insurance services platform, form an integrated delivery and finance system (IDFS) that offers unmatched end-to-end integration anchored by both organizations.

UPMC Insurance Services Division

builds 200+ proposals and business documents each year with Upland Software's Qvidian product. The division's Proposal Development Team replaced its time-consuming process of cutting and pasting from old proposals to create new responses with an efficient, scalable process. After switching to Qvidian, relationships between departments improved, SME response times decreased, and approved content usage increased by more than 200%.

UPMC



How do you revamp your proposal creation process and drive rapid adoption?

UPMC Insurance Services Division needed a structured proposal process that worked every time.

At UPMC Insurance Services, one of the largest insurers in Pennsylvania, everyone from SMEs and marketing VPs to the division chairman used to drop everything and scramble to answer RFPs before deadlines. Without a trusted content library, contributors cut answers from old proposals and pasted them into new RFP responses. Often, SMEs answered the same questions repeatedly, and version control was a nightmare. The division needed a scalable, repeatable process for creating proposals that worked better for all contributors.

Qvidian's content library offered critical content visibility and version control.

UPMC Insurance Services Division identified Qvidian as crucial to building a better process. "An add-on wouldn't cut it," said Erich Stamer, Senior Content Manager, Proposal Development Team. "We needed dedicated proposal automation software."

Qvidian stores past content versions automatically and tracks creation and usage data. "It's so much more than content storage," said Hannah Whiteside, Associate Content Manager, Proposal Development Team. "We get all the background info too." With Qvidian's insights, the team increased content usage by 208% in a year and went from missing one or two RFP deadlines annually to zero.

"Before we built-out our Qvidian library, we were getting RFP after RFP and manually searching through all these old documents. We were constantly reaching out to SMEs and asking repeat questions. It was a manual, memory-driven process that was slow and inefficient."

– Erich Stamer

Senior Content Manager
UPMC Insurance Services Division



With Qvidian, UPMC Insurance Services Division outpaces RFX and proposal demands.

UPMC Insurance Services Division keeps content fresh with unrivaled content management features.

Qvidian's leading content management features make all the difference for the UPMC Insurance Services Division. "There's so much that's valuable," said Whiteside. "Specifically, bulk loading lets me upload 50 new records in minutes." The team also creates custom metadata fields, so contributors can use industry-specific filters to find relevant content rapidly.

Linking related library content further helps users uncover the best content. "Links make it like online shopping," said Stamer. "They basically say, 'if you like that content, you'll also like this.'"

The team stressed that maintaining its proposal library is an ongoing project. They rely on Qvidian's content feedback tools to create a circular process

where proposal managers can suggest edits and improvements. With this closed-loop process, the division captures new content and suggestions to expand and strengthen its library.

UPMC Insurance Services Division advocates to make Qvidian the go-to resource for trusted proposal information.

Every year, the Proposal Development Team creates 200+ documents with Qvidian to support sales groups across multiple product lines and lines of business in the UPMC Insurance Services Division. The team reports that morale is higher than ever, relationships between departments are stronger because they no longer re-ask SMEs the same questions, and everyone has more time to comfortably meet RFP deadlines.

To cement Qvidian as a go-to resource, the Proposal Development Team regularly shares tips, tricks, and ad hoc training. They even launched what they call The Qvidian Cup. "We've made it a game," said Whiteside. "Users get points for using Qvidian, and then the winner gets a gift card. People truly get excited about using Qvidian."

"As important as you think of Facebook or Instagram for your social world, we think of Qvidian as that for our work life," said Stamer. "It's where we communicate and find content. Everyone should always have a Qvidian tab open."

Results for UPMC Insurance Services Division

200+
critical docs
created every year

+208%
content usage
including views, inserts,
and downloads

100s
of new records
added to the
content library

Upland Qvidian automates away the tedious and frustrating parts of 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.