

Empowering Sales and Proposal Teams to Accelerate Response Process



With a workforce comprised of the industry's top players, offices across the continent, and deep partnerships with the world's most sophisticated technology companies, including Cisco and Microsoft, Long View Systems helps businesses keep pace with the accelerating global digital transformation. The award-winning managed services and systems integration leader provides companies with technology solutions to complicated business problems.

Working with an extensive client base across various industries, Long View requires customized documentation and an expert content management system to support proposal processes across its bid/RFP team and sales team. Given the need for up-to-date and organized content to create high-quality proposals and supporting documentation, Long View was seeking a software solution with the capabilities and functionality to manage all of its content, streamline bid and proposal creation, and empower teams to respond quickly and close more deals.

Challenge: Inefficient processes compromise project success

Long View's previous stand-alone proposal management software did not integrate well with Office 365 or SharePoint, creating a complex and counterintuitive content management process. The bid team was forced to implement multiple steps to create and build projects; editing and creating responses to RFPs was a painful, time-consuming process. Similarly, creating customized templates was a complicated process and allocating team members for various content purposes was not feasible.

Burdened with inefficient, cumbersome processes and the inability to integrate its proposal management software with key enterprise applications, Long View was wasting time and resources, producing multiple content versions that created confusion and inconsistencies, and leaving bid teams feeling frustrated with the entire proposal process.

“With QorusDocs, our sales team has a one-stop shop for all sales and go-to-market collateral, helping accelerate the deal cycle and boost win rates. Plus, our proposal and sales teams have been able to increase productivity, eliminating the need to hire more resources.”

Dave Frederickson, EVP Sales, Long View



Solution: Integrated system drives efficiency

Seeking a sophisticated content management system and an efficient proposal generation process for its bid and sales teams, Long View implemented QorusDocs to streamline its response process and accelerate the deal cycle to drive new business revenue. QorusDocs integrates seamlessly with Microsoft SharePoint, enabling Long View to transfer existing content efficiently and accurately and avoid any major business interruptions during the migration period. “QorusDocs helped to ensure that what could have been a complicated migration was implemented smoothly and seamlessly,” noted Dave Frederickson, EVP Sales at Long View.

Long View has increased its QorusDocs licenses from 10 to 170 since 2012, plus additional licenses for collaborators, leveraging the solution across sales, marketing, procurement, operations, and more. While creation of proposals and RFP responses is the primary use case, Long View also uses smart fields for generating insights, reporting, and ‘go/no go’ decisions. “Our next step will be to connect QorusDocs with our new Microsoft Dynamics platform to help us customize proposals, RFP responses, and other sales documents with even greater precision,” said Frederickson.

Long View’s bid and sales teams can easily access the company’s content hub, referred to as “Connected Content”, using QorusDocs. Facilitating cross-branch collaboration, this centralized content repository hosts a vast quantity of resources for RFP responses, as well as boilerplate information for regular email use. The hub contains sell sheets, win wires, case studies, reference library, presentation ‘juke box’, templates (e.g., email templates), and sample business reviews (BRs) as thought starters for sales. After accessing the content through QorusDocs, users can personalize and customize to meet the unique needs of prospects.

“Increasing the productivity and effectiveness of our sales motions are critical to our success,” said Frederickson. “Our solutions are becoming more and more complex and our teams need to be able to pull forward references, use cases, and details of where we have helped clients. QorusDocs makes this possible.”

He added, “The ability to collaborate within the Teams integration connector has decreased our response time. Plus, being able to customize sources makes it easy for our team to quickly find a variety of content.”

With the efficiency and ease-of-use of QorusDocs, Long View not only boosted win rates and improved brand control and governance, but increased productivity and decreased response time, enabling the company to reduce headcount within its proposal team.

“Notably, our win rates within QorusDocs (primarily pursuits) compared to win rates for non-RFP business (which can be higher given prior relationships) are nearly the same. We consider this a major success,” said Frederickson. “And, of course, QorusDocs gives us a consistent line of sight to these results.”

Results

Greater efficiency

Quicker, streamlined content management and document creation processes help Long View’s teams make more efficient use of their time to produce high-quality proposals and supporting documentation. Turnaround time for RFP responses also improved.

Consistent, winning deals

By replacing its stand-alone proposal management software with the automated, integrated QorusDocs solution, Long View can quickly and efficiently build customized proposals and RFP responses that consistently win deals.

Robust content management

The centralized content hub provides access to up-to-date content, enabling bid and sales teams to create everything from emails and presentations to sales proposals and RFP responses. Content is easy to search for and categorize.

Stronger brand control and collaboration

Standardized, up-to-date content for all documents and templates, across multiple teams, improved Long View’s brand control and collaboration. The company regularly leverages the share/track functionality, particularly on email communications for sell sheets.

Ease of use

QorusDocs' smooth back-end simplifies the process of creating and building projects and managing templates. Intuitive auto-answer technology enables Long View to sort through content quickly and find winning answers for RFP responses.

Increased productivity

The integrated QorusDocs solution streamlined and accelerated Long View's ability to manage content and create sales response documents. Due to efficiency gains, the company was able to repurpose an employee from the RFP team without dropping win rates.

Data-driven insights

QorusDocs dashboards provide detailed intelligence to help Long View focus on the critical data that matter to prospects. Rich, integrated reporting features provide the company with important insight into proposals produced and content used.

About Long View

Long View Systems is one of the most powerful IT solutions and services companies in North America, with offices across the continent. With a clear focus on combining business and technology through its Hybrid IT solutions, including cloud, IT infrastructure, managed services, and end user support, Long View is able to define and customize what the future of IT looks like for its clients.

Website: www.longviewsystems.com

See QorusDocs in action!

Smart, speedy proposals. The fastest way to win business.

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About QorusDocs

QorusDocs is cloud-based proposal management software that streamlines RFP responses and automates proposal creation.

Intuitive and easy-to-use, QorusDocs enables teams to quickly respond to RFPs and create personalized, professional-looking proposals in minutes instead of hours, directly from Microsoft Office apps and popular CRM systems.