



# Stay Connected

**How to effectively respond to proposals  
with a fully remote team.**

## INTRODUCTION

# Transform your remote team into a community

There's this idea that remote teams are fragmented. Disconnected. Divided.

But for every division, there's an opportunity to build a bridge. Proposal teams that have mastered the art of remote collaboration, have done so by building virtual bridges. They have connected dispersed team members and have leveraged technology to keep everyone connected, focused, and productive.

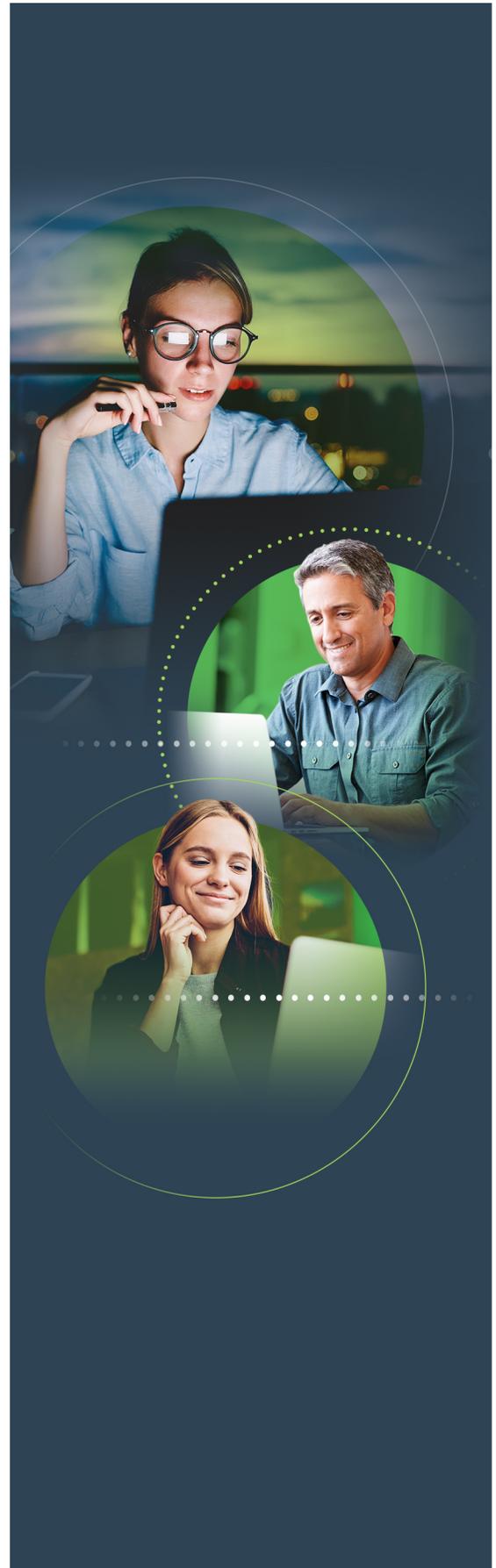
For teams who are navigating remote work, having the right technology will make a big difference.

*RFPIO provides a sense of community because we are all working in one place. It brings the RFP writer closer to both the subject matter experts and also the salespeople — it's a win-win for everybody.*

—**Patti Passow**, Senior Proposal Specialist  
at Illuminate Education

RFPIO is a response management solution built to facilitate collaboration between teams, remote or otherwise, keeping everyone aligned and allowing everyone to effectively co-create, communicate, and manage projects.

This solution brief will introduce the features and functionalities needed to complete proposals quickly and efficiently, helping your team stay engaged, focused, and productive — even when you're not sharing a physical space.



# Stay Engaged

## Manage projects smoothly

Teams can break projects like RFPs into manageable sections that can be assigned to appropriate collaborators. These tasks are automatically delivered to contributors wherever they're working, and include key project details, due dates, and ongoing reminders as deadlines approach.

A comprehensive and interactive dashboard gives insight into what projects your team members are working on — and provides visibility into who has bandwidth to take on new projects.

- **Break complex projects into manageable sections**
- **Gain visibility into your team's workload**

## Collaborate with everyone

Content sharing and collaboration often needs to happen with people in and outside your organization. RFPIO's assignment of guest authors and reviewers will ensure you can efficiently work with partners and other third parties. Rather than creating and managing duplicate content libraries for each business unit or external partner, you only have to create and maintain a centralized content library. You can also adjust user permission levels to restrict access to sensitive content.

- **Share content between business units and with external partners**
- **Adjust user permission levels to restrict access to more sensitive content, as necessary**

*For our proposal response team, the sudden change in work environment was eased because we use RFPIO. The platform enabled my team to adopt a remote working model seamlessly.*

**—Kevin Knopf**

Assistant Vice President of  
Marketing Communications  
at Keenan & Associates

## RFPIO HELPS YOUR TEAM

# Stay Engaged continued

### Remove language as a barrier

With a user interface that supports over a dozen languages, and the ability to translate RFP content using Google Translate, RFPIO makes working globally a little easier.

For companies whose local teams take the lead on responding to RFPs in their native language, RFPIO can layer answers in multiple languages — both enriching your answer library with multilingual content and empowering your international team to craft compelling sales proposals in any language.

- **Customize your work environment with a User Interface available in 17 languages**
- **Simplify content translation via in-app integration with Google Translate**
- **Empower your international team to craft proposals in any language**



# Stay Focused

## All your content in one place

Keep the most up-to-date information about your company, products, and services in a single place: the RFPIO Answer Library. Rather than reaching out to your technical experts directly, your team can use a keyword search to quickly find the information they need.

Additionally, the unlimited user licensing means that you can grant everyone across your organization — in addition to third-party vendors and partners — access to the Answer Library at no additional cost.

- **Maintain a single source of truth about your company, products, and services**
- **Find the information you need with a quick keyword search**
- **Grant access to anyone you'd like, inside and outside your organization**

## Capture and evaluate bid opportunities

A consolidated view of current and past bids and opportunities allows your team to evaluate them against past wins and losses to select when to participate and when it may be better to pass. This streamlined view provides sales teams constant visibility into the progress and approval status of intake requests — freeing your team to focus on crafting compelling proposals.

- **Effectively evaluate opportunities for bid/no-bid decisions with in-app analytics**
- **Upload all requests directly into your CRM using RFPIO intake**
- **Give sales teams visibility into progress and approval status**

*RFPIO has really helped us engage in projects more effectively, because all of the information sits in one place. With RFPIO, we have a collaborative system that allows us to work together with our teams and produce a more compelling message.*

**–Brian Trigg**

Director of Sales Operations  
of Global Services and  
Intelligence at FireEye

## RFPIO HELPS YOUR TEAM

# Stay Productive

### Edit proposals in real-time

With less time together, it can be hard to know who is working on what and the review process can take an exorbitant amount of time.

With concurrent editing, teams can work in-real time, dramatically reducing the time it takes to finalize a document or project and eliminating the typical back and forth of the review process.

Additionally, this functionality removes the need for someone to consolidate everyone's changes and is a game changer for most teams.

- **Real-time visibility into everyone working on projects**
- **Collaborative editing keeps your team working in sync**

*With RFPIO, we're completing RFPs 7-8 times more efficiently — RFPs that used to take us up to 300 total hours to complete, we're now finishing in just 40 hours.*

— **Nick Fitzsimmons**, Director of Sales Solutions at Celtra

### Find the right person for the job

Knowing quickly who can help with a proposal or a specific question can save a lot of time. RFPIO intelligently matches sections and questions with authors based on past responses but it doesn't stop there. Visibility into any team members bandwidth ensures an even workload for the team — routing projects to those with the most availability so you don't lose precious time or overload specific individuals.

- **Match the most qualified author to certain sections and questions**
- **Assign work to team members with most availability**



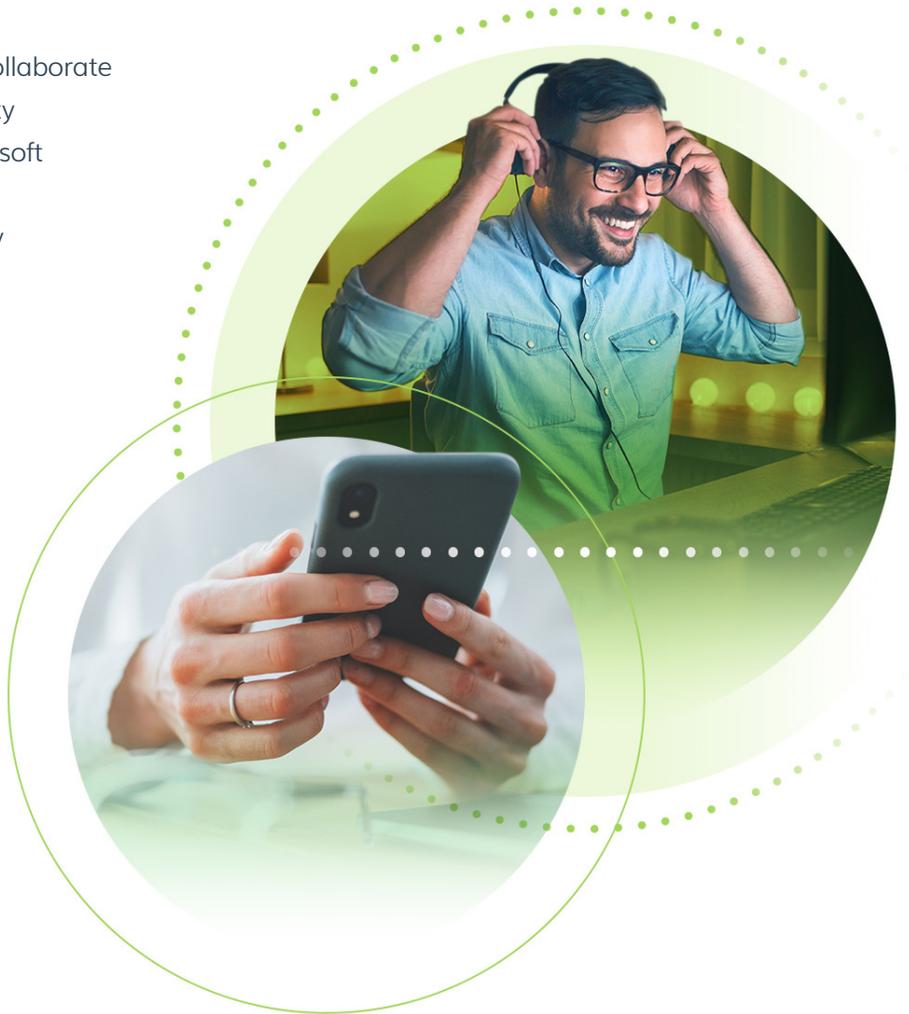
# Stay Productive continued

## Collaborate across platforms

Complex projects like RFPs and Security Questionnaires are a team effort, often engaging multiple departments, teams, and offices across the organization — as well as external partners, writers, and translators.

With RFPIO, dispersed teams can both collaborate in-app and also across popular third-party applications including email, Slack, Microsoft Teams, Google Hangouts, and Jira. Collaborators can engage bi-directionally with RFPIO projects on their preferred communication platform.

- **Collaborate across dispersed teams using in-app comments and @-mentioning**
- **Engage your team across email, Slack, Microsoft Teams, Google Hangouts, and Jira**



## CLOSING

# Keep Doing Your Best Work

A recent [McKinsey article](#)<sup>1</sup> explained that employees who spend less time traveling or commuting are likely to be happier, more motivated, and ready to mobilize in extreme situations.

Done right, remote working can boost productivity and morale — and even strengthen bonds between teammates to build a stronger, more connected workforce.

[CoSo Cloud](#)<sup>2</sup> reported that 77% of remote employees say they're more productive when working from home. Remote working isn't a challenge — it's an opportunity.

Proposal teams that thrive in a fully remote environment focus on staying connected, and understand that facilitating collaboration between team members is the first step to keeping employees engaged and motivated.

With features that support advanced project management, RFPIO empowers your team to stay engaged, focused, productive, and collaborative — helping teams continue to do their best work, regardless of where in the world they are working.

1 Raphael Bick, Michael Chang, Kevin Wei Wang, and Tianwen Yu. "A blueprint for remote working: Lessons from China" McKinsey Digital, March 2020. <https://www.mckinsey.com/business-functions/mckinsey-digital/our-insights/a-blueprint-for-remote-working-lessons-from-china>

2 "CoSo Cloud Survey Shows Working Remotely Benefits Employers and Employees" CoSo Cloud, February 17, 2015. <https://www.cosocloud.com/press-releases/connectsolutions-survey-shows-working-remotely-benefits-employers-and-employees>



**77%**  
MORE  
PRODUCTIVE

*77% of remote employees say they're more productive when working from home.*

**—CoSo Cloud**