RFPIO for PreSales Professionals

Streamline your response process, save time, and win more deals by leveraging RFP automation software.

RFPIO

Key Benefits:

- Cut response time to complex documents like RFPs, RFIs, and Security Questionnaires by 40%(on average)
- Consolidate company information in a centralized Answer Library, and access it easily make it accessible from platforms like Google Chrome, Slack, MS Teams, Salesforce, Word, Excel, and more
- Improve collaboration and simplify proposal management
- Gain data, insights, and reporting on your response efforts to improve future decision making

Solution Components:

- AI-enabled Answer Library and recommendation engine of previously answered company questions
- Advanced project management features, including task assignment, review sequences, and project dashboards
- @mentioning and in-app comments
- Built-in business intelligence and analytics
- Bi-directional integrations with CRM, cloud storage, and communication apps like Salesforce, Microsoft 365, Slack, Jira, and more

Cut response time by 40% on average

By nature, pre-sales professionals excel at matching solutions to tough problems. As such, they play a vital role in responding to RFPs, offering contributions that can be the difference between a winning and losing a deal. However, much of this work is repetitive: presales professionals can spend as much as 75% of their time responding to RFPs, on top of their other priorities.

Even though presales professionals are already stretched thin, our 2021 Benchmark Report on Proposal Management found that three-quarters of organizations plan to respond to more RFPs in 2021, while only 37% plan to increase proposal-related headcount.

RFP automation software fills this gap, enabling organizations to increase RFP response efficiency, respond to more RFPs in less time—and, ultimately, win more deals.

Key Challenges

- RFP-related content is stored across spreadsheets, documents, and/or emails, rather than in a centralized location. Repeat questions will either be answered by searching through old documents, or from memory.
- Collaboration happens via email or meetings, resulting in cumbersome email chains, excessive document versioning, and missed deadlines.
- Questions are assigned using color-coded documents or not assigned at all, resulting in delays and confusion around responsibilities.
- Minimal insight into key metrics like past wins/losses, project timelines, or total hours spent

Solution Overview

RFPIO consolidates question-answer pairs into a smart, searchable, AI-powered Answer Library. After a questionnaire (e.g. RFP, VSA) is uploaded to the platform, Auto Respond uses AI and machine learning to automatically respond to commonly seen questions. For questions not answered with Auto Respond, the Recommendation Engine suggests answers the responder can pick from. In-app collaboration features and project management tools—such as @mentioning, in-app comments, project dashboards, and task assignments—streamline collaboration and keep teams aligned. Through a combination of AI, streamlined collaboration, and seamless project management, teams using RFPIO cut response time on average by 40%.

Manual Response	AI-Enabled Response
Answers are searched for in spreadsheets, old drafts, and emails	All question-answer pairs are stored in an AI-enabled Answer Library
Questions are responded to individually. Presales professionals may respond to repeat questions multiple times.	Auto Respond leverages AI and machine learning to automatically respond to commonly seen questions
Collaboration happens via emails or in-person meetings	Collaboration happens within RFPIO using @mentioning and in-app comments, subject matter experts (SMEs) can even reply from other communication tools, like Slack or Teams, to save time
Questions are assigned using color-coded documents or not assigned at all, resulting in delays and confusion	Questions are assigned within the RFPIO app. Collaborators immediately see questions they've been assigned from the project dashboard.
Minimal insight into key metrics like past wins/losses, project timelines, or total hours spent	RFPIO measures key indicators like wins/losses, project timelines, total hours spent, and Answer Library usage, giving you data-driven insight to improve your process and win more deals.
RFP response happens in silos. Not connected to other processes or campaigns happening at the organization.	Integrations with CRM, cloud storage, and communication platforms like Salesforce, Microsoft 365, Slack, Jira and MS Teams aligns proposal efforts with other initiatives across the organization.

We'd like to help you automate your response process

See how RFPIO could work for your team by scheduling a custom demo at **www.rfpio.com/schedule-a-demo.**