

# cegid

## Achieving strategic business goals with RFP automation

### About the customer

Cegid is a global SaaS (Software as a Service) solutions provider based in Lyon, France. They provide finance, point-of-sale, payroll, and talent management software solutions. Their talent management division is based in Montreal, Canada.

### Challenge

To identify organizations that are a good fit for Cegid's full-life-cycle talent management solutions, Matthew Combs, Sales Coordinator, North American Sales Team, scours publicly issued requests for proposals (RFPs).

"I review various RFP aggregator or bid sites on a daily basis," he explained. "It's my job to conduct that initial filtering to see which RFPs we might want to respond to."

After making his recommendations, the sales team as a whole decides which opportunities to pursue.

"We employ a rigorous go/no-go process to determine if the RFP is something we want to devote time and resources to," Matthew said. "Once we decide an RFP is a go, it's my responsibility to coordinate with our sales team and subject matter experts to complete the sales proposal."

For years, Cegid managed the RFP response process using manual tools.

"We kept a complete list of all our previous sales proposals — which were in Excel, Word, or PDF format — on our internal network," Matthew said. "We also had an Excel file with common questions and their answers. We would search through those files to find content for new proposals we were creating."

Unfortunately, this process proved cumbersome and time-consuming.

"It would take hours to find all the answers we needed, and a lot of times, we just relied on our memory," Matthew explained. "Using Excel to store content also wasn't as manageable as we would have liked. You constantly have to update it, and we could never find the time."

### Solution

Cegid decided they needed a better way to manage proposal content to become more optimized and strategic about time management, effectiveness and efficiency the same way they think about their talent management software solutions.

"We reached a point where it just wasn't feasible to manage all of this knowledge through Microsoft Office documents," Matthew said. "It just wasn't as efficient as we would have liked."

Fortunately, they knew exactly what they wanted in an RFP management solution.

"Our primary goal was to have an easily searchable knowledge base with all of our previous questions and responses," Matthew said. "We wanted to quickly retrieve information we had previously used and repurpose and adjust it for new sales proposals."

**Industry:**

Talent management

**Solution:**

RFP360 for response management

**Volume:**

More than 50 RFPs per year



**They found exactly what they were looking for in RFP360.**



**It's really a combination of the quality of the tool and the customer service that has made our use of RFP360 so successful.**

## Impact to the client

Since implementing RFP360 three years ago, Cegid drastically reduced their proposal creation time.

"RFP360 allows us to quickly complete our sales proposals, so we can now respond to more RFPs," Matthew said. "We used to send out 25 to 30 sales proposals annually, and now we've successfully doubled this number enabling us to reach more of our vertical audience in Manufacturing, Retail & Hospitality and HighTech Professional Services."

The main reason Cegid more quickly responds to RFPs is the order RFP360 brought to their proposal management process.

"Responding to RFPs is much more streamlined and structured," Matthew said. "We have a process we use to assign questions and upload content, which really accelerates our response time."

RFP360 also accomplished the goal of helping Cegid reuse past proposal content more efficiently.

"We're finding relevant content very quickly," Matthew said. "And we can update the associated keywords on the fly to fine-tune our search results, meaning it's always easy to find the content we need."

And with RFP360's bulk auto-answer tool, KnowlEdge, which uses artificial intelligence to suggest relevant responses to RFP questions, finding the right answer is nearly instantaneous.

"The ability to click on a question and have RFP360 automatically provide corresponding relevant search results from the Knowledge Base is great," Matthew said. "That saves me and our subject matter experts a ton of time."

Best of all, Matthew is always confident in the content he's using.

"We know the quality of our repurposed proposal content is high because it's already been previously validated," he said.

And the ability to quickly create compelling proposals has helped Cegid achieve their strategic business goals across multiple languages and continents.

"It's definitely had a positive impact on the development of new business," Matthew said. "We've been able to cast a wider net in terms of responding to publicly issued RFPs. The tagging features in RFP360 allow us to easily categorize our content in different languages, as we submit sales proposals for both English and French RFPs. The organization feature allows us to add users from our North American and European business units in order to create sales proposals for both markets."

Matthew also touts RFP360's ease of use, which allows him to get new users up and running quickly.

"I created some training materials to help anytime we have someone join the sales team, but after they use it once or twice, they don't need them anymore," he explained. "The tool is so intuitive that it's kind of like riding a bike — once you get used to it, it's just second nature."



**My customer success manager touches base with me on a regular basis, and anytime there's an issue, they respond very quickly. It's really a combination of the quality of the tool and the customer service that has made our use of RFP360 so successful.**