



Delivering a better client experience with RFP software

About the customer

Lockton consults with employer groups to help them with risk management, employee benefits, and retirement services.

Challenge

Leaders at Lockton take pride in providing their clients with world-class customer service and helping them find solutions that will provide lasting value.

“Our clients and prospects come to us asking for best practices on new solutions both from a technology and utilization perspective,” said Eric Hollenbach, HR technology consultant at Lockton. “We make sure to help them understand their goals and how to achieve them, as well as how to navigate the vast HR technology marketplace.”

To provide an even greater experience for their clients — and vendors — Lockton sought to streamline their request for proposal (RFP) process.

“We were using multiple Excel spreadsheets and emails to issue RFPs. We also had a vendor database where we would house all of our vendor profiles. We had to marry all of that data when we got into RFP scenarios,” Eric said. “A year or so after I started, we began looking for other options.”

Solution

Lockton had three specific goals they wanted to accomplish with their RFP solution:

- Freedom to focus on consulting by automating administrative tasks.
- Easy access to actionable data by replacing Excel spreadsheets.
- Enhanced partnerships with vendors by simplifying their RFP response process.

RFP360 emerged as the best option. “We’re pleased to say all three of those goals have been met,” said Brad Mandacina, director of the HR Technology Practice at Lockton.



Industry:

Property and casualty, employee benefits, and retirement



Solution:

RFP360 for request management



Volume:

35 RFPs per year



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Impact to the client

RFP360 empowered Lockton to speed up the process of issuing RFPs — allowing them to better support vendors and reduce costs for clients.

“We had templates in Excel, but we’d always have to add customizations. Then, we’d send multiple copies of those spreadsheets via email, and we’d have to track those emails individually,” Eric said. “RFP360 helped us streamline our templates so we don’t have to add as much. We’re a billable-hour practice, so that reduction in time is great for clients. Additionally, we now have time to ensure our vendors understand the questions.”

Another key benefit is the ability to easily create and search vendor profiles.

“I have two colleagues who work more closely with profiles than I do, but I know they’re now able to keep an organized database of vendor responses to requests for information [RFIs] and find answers more easily,” Eric said. “I think that’s made their lives easier because we get questions from the other Lockton offices, their clients, and prospects every day about vendors they’re working with, and now we can easily answer those questions.”

RFP360 also gives Lockton greater insight into the RFP process.

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And RFP360’s value continues to increase, as enhancements — including the recently released Client Discovery module — provide greater improvements to the RFP process.

“We’ve tried multiple methods of managing discoveries in the past,” Eric explained. “First, we sent out a lengthy survey but found it wasn’t as effective as we initially hoped. Then, we switched and made a Word document, but it ended up consisting of 70 pages worth of questions.”

Once Client Discovery was released, Eric jumped on the opportunity to see it in action.

“As soon as it came out, I said, ‘I have a client I’m using it with tomorrow,’ he explained.

Eric made sure his client was aware he was implementing a new, untested discovery process, but the warning proved unnecessary.

“I explained the process to my client and let them know they were the first to go through this and asked for their patience, as I wasn’t yet 100% familiar with how it works. But we went through it, and it was very easy,” he said. “RFP360 is easy to navigate in general, and this was more of the same.”

His client was equally impressed.



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“Without having to spend a ton of time beforehand, I was able to walk my client through it — how to use it, how to get into it, how to answer, how to add people to it — and it was seamless,” Eric said. “The client was very impressed with the technology.”

One reason Client Discovery provides Lockton’s clients with such a positive experience is that it allows for greater internal collaboration.

“Moving this process online — instead of asking clients or prospects to sift through a giant Word doc — is a huge plus,” Eric said. “They can add other members of their team and have them answer questions at the same time without having to worry about duplicating responses. That’s been a game-changer.”

Client Discovery also makes it easier for Lockton’s vendors to respond to RFPs.

“Vendors often feel like they’re not getting a lot of insights from what our clients and prospects tell us,” Eric explained. “We’ve always sent our discovery to them, but now, they can view it within their RFP as they’re answering questions. It’s much easier for them.”

But RFP360’s benefits don’t stop with innovative technology.

“I used to joke with Dave [Hulsen, operational lead and co-founder of RFP360] that I didn’t know if he had a voicemail because he would always answer our calls,” Eric said. “And support has remained top-notch as RFP360 has grown. Every time we call, if we don’t get someone live, we get a response in minutes.”

Eric went on to explain that RFP360’s team isn’t just responsive — they’re collaborative.

“They have taken a lot of our feedback and incorporated it,” he said. “They have been awesome partners.”

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