



## Building trust and delivering value to clients and vendors

### About the customer

Benefit Technology Resources (BTR) delivers value to clients through innovative solutions and product partnerships — an approach that has positioned the company as a trusted source of human resources technology. They're focused on finding the right strategic products and services that provide superior support for an organization's people and processes..

### Challenge

BTR is in the business of finding HR technology that's a perfect fit for each client.

It's a unique challenge that requires getting the right answers to complex questions from both clients and product or service providers. Because the process of requesting and evaluating information involves a lot of people and moving parts, BTR's manual RFP process quickly became a burden on staff and vendors.

Their team would build and send a complicated Excel workbook with prepopulated profile questions to each vendor invited to participate. Then as vendors sent proposals back, staff had to manually track and update a secondary Excel workbook with their responses — updating the file routinely as it contained details from all projects. And depending on which contact they were working with, there could be variances in responses from the same vendor regarding functionality that had to be reconciled.

### Tipping point

Instead of a single moment that sparked a change, BTR's decision to search for a better approach was a process — a very common experience when dealing with a manual RFx approach. The first project, while not ideal, is smooth enough. But with every subsequent project, inefficiencies and frustrations pile up. The decision to look at RFx software to solve the problem eventually becomes obvious.

**“Re-creating documents over and over again, having to maintain multiple versions of documents, even if it was for a single client — it really just became too much to manage. That’s when we turned to RFP360.”**

— Jannette Kresser, strategic initiatives project manager for Benefit Technology Resources



#### Industry:

HR technology



#### Solution:

RFP360 for Request Management



#### Key benefit:

Sourcing HR technology solutions that are a perfect fit for every client.

## Solution

Instead of trying to fix a challenging process with software alone, BTR used the opportunity to reimagine their entire RFP-related sourcing workflow. Using RFP360 as a hub, they turned to an eRFx approach where client discovery, RFP development, project management, vendor engagement, shortlisting and proposal evaluation steps all take place in a single, online tool. This shift has eliminated the inefficiencies of disorganized and cumbersome spreadsheets, documents and email.

BTR starts with a client discovery questionnaire so they can collect insights that help answer questions like: Does the client need to optimize their current system? Do they need a point solution or an entirely new tech stack? This extensive questionnaire (250 to 300 questions) is created “with a few clicks of a button and entering minimal information” using their prebuilt template, and then it’s delivered digitally to the client — all inside RFP360.

Once the client completes it, which also is an intuitive and simplified experience in RFP360, BTR schedules a call with them to discuss their answers and ensure everyone’s on the same page. The final version of the client discovery is then linked to the eRFx, which BTR quickly generates electronically and sends to selected invited vendors in just a few steps, again using only RFP360.

Vendors use the free, built-in response management features in RFP360 to more efficiently answer the eRFx and submit proposals. Then once they get all of the responses back, BTR exports them into a report that’s shared with the client.

“Because we’re managing everything in RFP360, we’re not having to re-create that template each time since it’s already saved in there,” said Jannette. “And we’re able to get the reports sent out in a matter of minutes versus hours.”

One other aspect of the solution that adds value is the ability for a vendor to complete and update an online profile in RFP360. BTR then accesses and leverages those vendor profiles whenever they need them — empowering staff to create shortlists and improve relationships that benefit their clients.



**We would be lost without RFP360. Having to maintain everything in external Excel spreadsheets or other documents — we couldn’t go back to that original process. We’ve grown too much, and it just wasn’t sustainable.**

— Jannette Kresser, strategic initiatives project manager for Benefit Technology Resources

## Q&A

As the strategic initiatives project manager for BTR, Jannette Kresser is charged with developing vital relationships with vendors and service providers in the HR technology marketplace. Her role is crucial as the company works to find the right solution for every client. Because of her focus, Jannette is a key administrator of their RFP360 request management system.

### **When your team decided to evaluate software to simplify your process, what made RFP360 stand out?**

**Jannette Kresser:** The ability for vendors to own and control the information contained in their profiles and then update them in real time as they introduce new functionality was really big for us. That took a huge burden off of our team and the company.

The RFP360 team also was incredibly patient and took the time to understand our needs as we determined whether or not the software would be a good fit for us. We’re a technology advocating company, promoting the utilization of technology to improve the efficiency and reliability of clients’ processes. Yet, here we were not following that same methodology with RFPs — so we really felt it was time to walk the walk.

## **Were there other key reasons that you ultimately chose RFP360?**

**Jannette Kresser:** The knowledgeable sales team, the technology and the ability to deploy in a crawl-walk-run fashion as we completely changed our processes. It was a huge change management initiative for us, so having the support to implement the software in that kind of fashion was extremely important.

Also, the commitment to continually developing new tools and being a true business partner was critical. In my role, I help to build vendor relationships with the service providers in our industry, so I fully understand just how important this relationship is. We need to be able to lean on service providers to assist us, but we also want to provide good feedback and ways to improve the product. It's really a two-way street, and working with an organization that is open to receiving that feedback and actively seek it out is key for us as well.

## **What are some of the benefits you've seen?**

**Jannette Kresser:** One of the things that I appreciate most is that we can create a capabilities questionnaire using RFP360's client discovery feature, and similarly, offer online vendor profiles.

The software in general has been beneficial because it empowers us to easily compare the capabilities of different platforms from an apples-to-apples perspective — to see how they respond to the exact same questions. When you're not utilizing a solution like RFP360, that can be really difficult and challenging.

Communication has definitely been improved. Not only are we communicating better with the vendors that we work with, but with our clients as well. Because when we finish the discovery questionnaire with the client, we're able to share that information to all of the vendors so that they all have the same information when responding.

## **Do you also use vendor profiles to create shortlists?**

**Jannette Kresser:** We do. Yes, absolutely. We rely heavily on profiles to see whether vendors are going to meet our clients' needs. We run a report comparing specific functionality contained in the profiles to see which vendors are really going to be the best fit for the client and create a shortlist based on that information. We usually narrow the shortlist down to three to five vendors for a client — it's one of the main things that we use RFP360 for, to create shortlists that help us find the right technology for clients. I couldn't even put a number on how many profiles that we have in there right now.

## **Why is RFP360 a good fit for your organization or other organizations like yours?**

**Jannette Kresser:** It's a good fit when you have multiple vendors and solution providers that you're working with in a market, and you need that information at your fingertips at any given time. What I also like about it, as I stated before, is that the vendors are able to go into RFP360 and update that information at any time, whenever they have major updates to their system and changes in their functionality. It's especially helpful for a consulting-type organization that's trying to manage all of that knowledge on many different platforms all at once and get it out to the people who need it.

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