

An abstract background graphic consisting of a grid of light grey, rounded rectangular tiles that recede into the distance, creating a sense of depth and perspective.

# Responding to RFPs Workflow and Automation

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# About Me

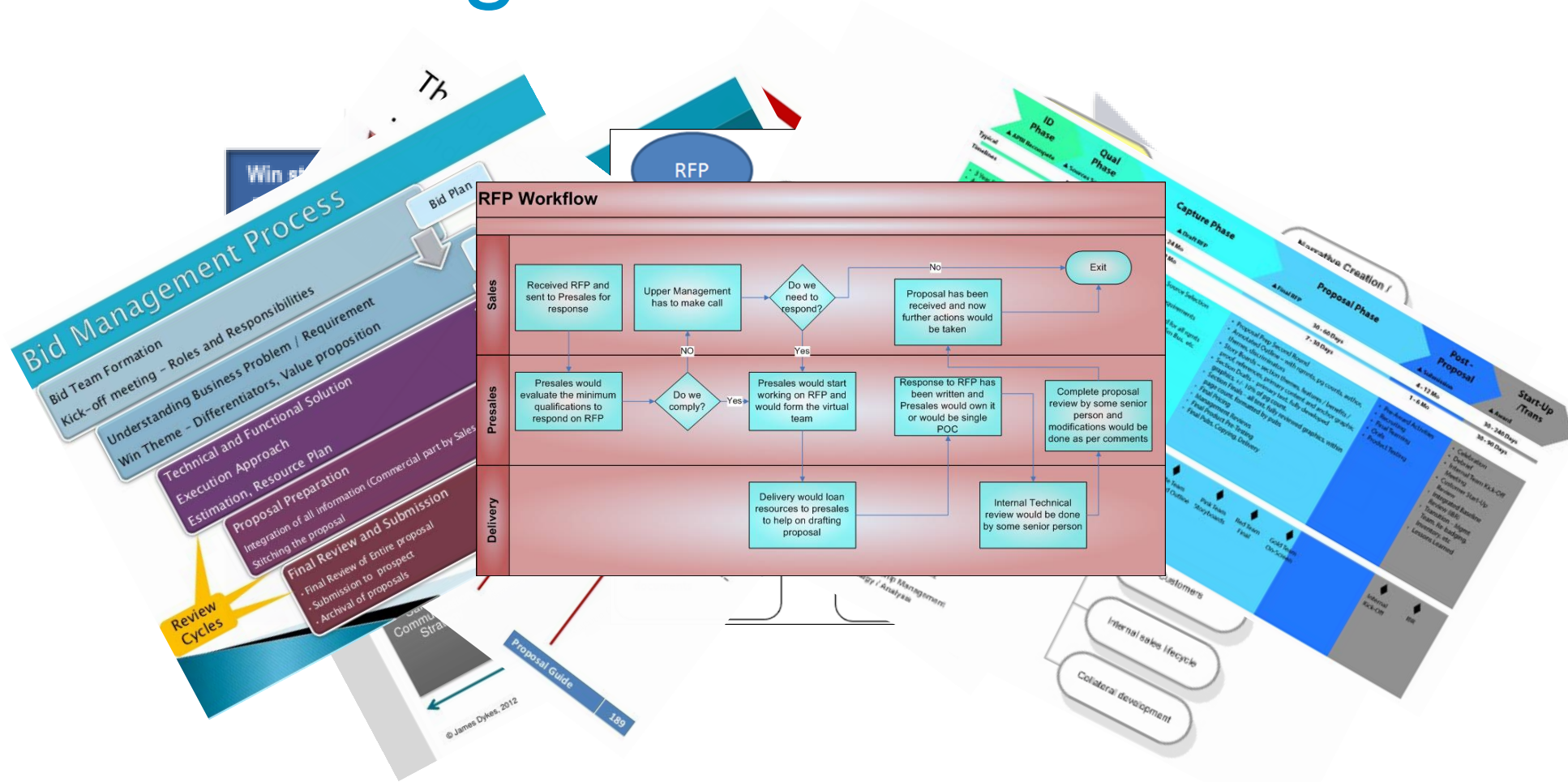
- + Andy Jeffs
- + Senior Project Manager, EMEA
  - + Twenty years' experience with Sant and Qvidian
  - + Project Management, System Configuration and Training
  - + Tom Sant's Proposal Writing Methodologies
- + Connect
  - + <https://uk.linkedin.com/in/andyjeffs>



# Agenda

- + The Challenges Of The RFP Process
- + The “Traditional” Way
- + Bridging The Gap
- + Further Reading
- + Open Q&A

# The Challenges



# The “Traditional” Way With Qvidian...

- + Are you a 40%er?
  - + Use Qvidian for Content Library Only
  - + To Clipboard + Paste
- + What about the process?
  - + Version Control
  - + Inter-team communication
  - + Engagement with SMEs
  - + Tracking progress and status



# The Gap

“Using the right technology to bring together the right people at the right time to work with the right messaging to achieve the right result”



# The Gap

“Using the right technology to bring together the right people at the right time to work with the right messaging to achieve the right result”

- ~~+ Multiple sources of information~~ ✓
- + Multiple contributors and reviewers
- + Multiple versions of the “working document”
- + Difficult to keep track of progress
- + Limited “feedback loop”



# WARNING

THE FOLLOWING CONTAINS SCENES  
THAT SOME VIEWERS MAY FIND  
UPSETTING

VIEWER DISCRETION IS ADVISED







# Smartmarking

## + “Classic RFP”

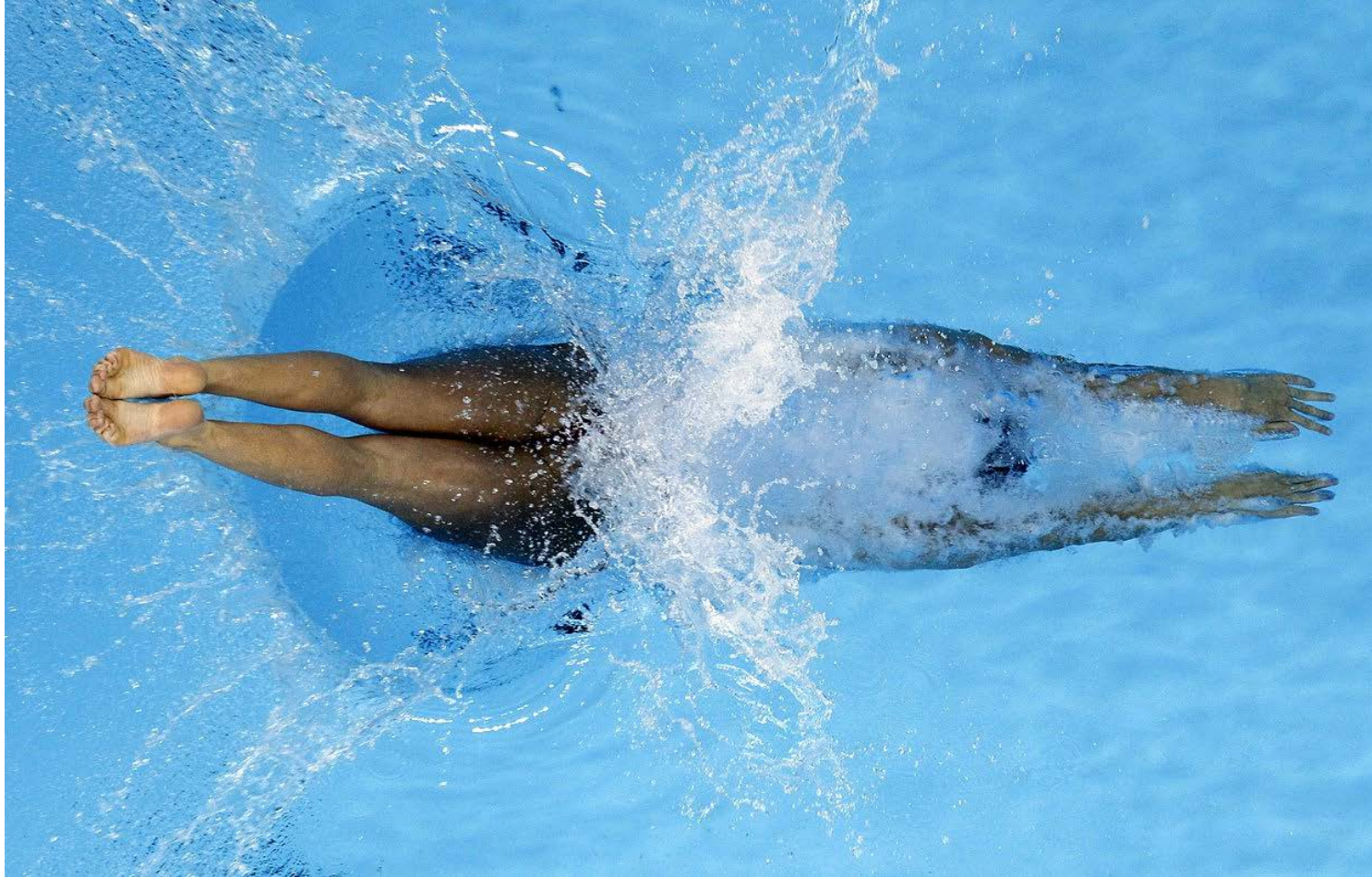
- + Excellent for large, complex RFPs and large teams.
- + Great solution for repeat RFIs, DDQs, etc.
- + Requires preparation and set-up to gain optimal benefit

The screenshot displays the Qvidian Smartmarking software interface. The top ribbon includes tabs for File, Home, Insert, Draw, Design, Layout, References, Mailings, Review, View, Qvidian, and a search bar. The Qvidian ribbon contains icons for RFP Marking (Save, Cancel, Tools), Manual Marking (Prev, Next, Mark Header, Mark Question, Mark Answer, Mark Table, Remove Marker), SmartMarking (SmartMark Headers, SmartMark Questions, SmartMark Answers, SmartMark Remove), and Help. The main document area shows a table of contents with sections: Header, 1. SUPPLIER REQUIREMENTS, 1.1 Financial Information, 1.2 Company Information, and 1.2.1 Please complete the following. Below the table of contents is a form with fields for Supplier Name, Supplier Contact, Supplier Address, City, State, and Zip Code.

Supplier Name:		Supplier Contact:	
Supplier Address:			
City:	State:	Zip Code:	



# Let's dive in...





# In Summary

- + Get to first draft faster – AutoFill and AutoSearch
- + Get closer to final draft – Stay working within Qvidian
- + Collaborate with your team more effectively
- + Monitor progress
- + “Close the Loop” on capturing new content
  
- + Why don't I have it now? Talk to your Project Manager...
  - + Global Settings
  - + Application Permissions
  - + Home Page Customisation
  - + In-Product Help



upland Qvidian

Thank You!

*#QvidianEMEA #RFPWorkflow #ProjectAutomation*