loopio | **salesforce**

Proposals in the Cloud:

Why Salesforce Trusts Loopio to Power Their RFP Program

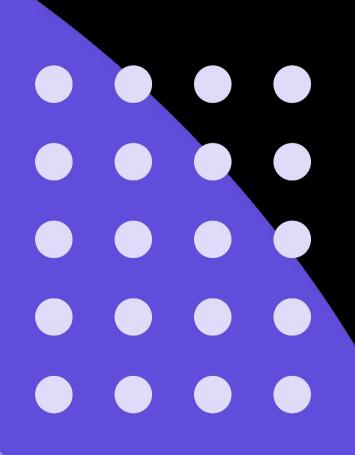
Success Snapshot

51% Automation Rate

700+ Proposals Annually

7.7 Hours Per RFP

> "When looking at other vendors, we didn't feel like they could meet the enterprise scale that we are really working at."

Erin Thedwall
Director of Proposals
Salesforce

Challenge
Too Many Tools, Too Little Time

Before Erin Thedwall worked in proposals, she was a budding journalist, learning the ropes of a fast-paced newsroom and the power of storytelling.

Today, she's transitioned her deadline-driven prowess to a new career path. As the Director of Proposals for Salesforce's Global Selling Experience, Erin captains a strategic team of 19 RFP experts with her data-driven approach (and passion for driving business impact).

Within a span of ten years, and after several acquisitions and mergers, the size of Erin's team quadrupled. Together, they established a robust and reliable Commercial RFP program for Salesforce.

The only problem? Her team's work was spread across too many different tools—from Salesforce itself to Google Docs, Slack, and countless others—which led to a lot of context-switching for her proposal strategists and proposal managers. Not ideal, when your team is handling hundreds of RFPs annually, tied to important, strategic sales deals.

Erin wanted to streamline the process for her team, but she needed a partner who could support the complexity and scale of projects her team tackled.

The only tool she trusted to meet their enterprise needs? Loopio for Salesforce.®

Given the high volume of work and variety of products her team handled, Erin recognized that the customization—and familiarity—of Salesforce would be a huge asset to her team.

"The sheer volume of work that we're putting out is higher than other companies, as well as the variety of products. There's lots of different people doing different things," explains Erin. "That's why the degree of configuration and customization attracted us to Loopio for Salesforce."

Solution
Qualify, Respond, and Analyze RFPs, Directly in Your CRM

Now, Erin's team uses Loopio for Salesforce® to handle their proposal process from start to finish. The all-in-one solution helps them qualify, respond, and analyze their RFPs, with full integration with their CRM data.

With Loopio, Erin's team is able to use one platform to:

- **Evaluate & triage** incoming RFPs
- **Craft a speedy first draft** with AI-driven response auto-retrieval
- **Proactively manage content** health (and effectiveness)
- **Create robust reports** on team capacity, RFP volume, and revenue impact

Erin explains, "What we've been able to do is pull all those process pieces into one place, and automate what we need to automate. This reduces errors and makes us more consistent across the board."

On the topic of automated workflows, Erin's team has built a robust qualification process in Loopio (also known as 'go/no-go'). This helps her team triage incoming RFPs as a good fit for her proposal managers and strategists—or a self-service opportunity for sales, so nothing falls through the cracks.

"Now, with Loopio for Salesforce, it automatically sends RFPs that aren't a fit to self-service. They get an email and notification explaining that this didn't meet our criteria. It also provides a link to our content library, templates, and resources," Erin explains. "Basically, it helps us immediately route those away. Loopio's a big help with that, so we're able to take those hours and put them somewhere else."
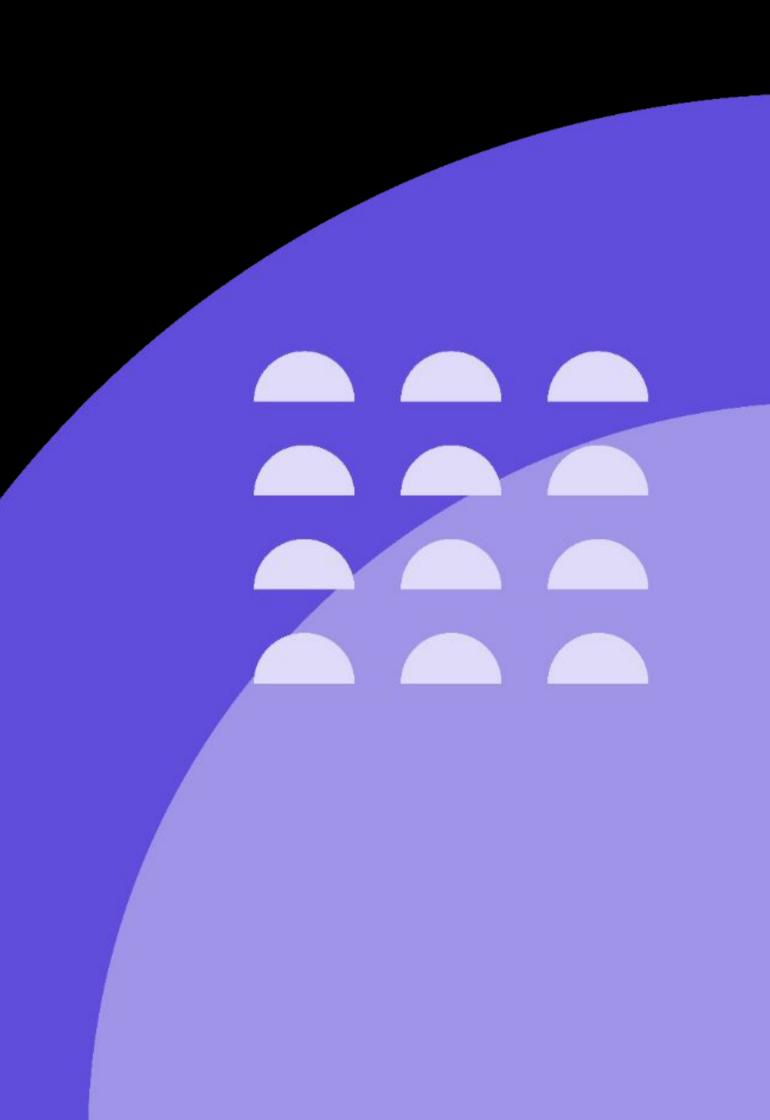
"With Loopio for Salesforce, we've been able to pull our process into one location and introduce those automated steps. Last year, we saw a 51% automation rate across all our RFPs."

Erin Thedwall
Director of Proposals
Salesforce

> "We're able to create those data points, thanks to the customization of Loopio for Salesforce."

Erin Thedwall
Director of Proposals
Salesforce

Results

Data-Driven Programs, Influencing Measurable Results

Today, Erin's streamlined her high-powered proposal process even more, with Loopio. Her team has achieved astonishing results, including:

- **7.7 hours** on average per RFP
- **700+** proposals answered annually
- **75%** advancement rate on those bids

Beyond efficiency gains, Erin emphasizes the pivotal role that the data in Loopio has in driving informed decisions and a strategic focus for her team.

"You can't improve upon what you can't measure," Erin emphasizes. "My team started as four people. We've been able to grow because we can share data that shows the need for it in Salesforce."

By using Loopio, the only 100% Salesforce native RFP solution, Erin can confidently collect and track data that's directly integrated with her CRM.

"If I sit down today and say, 'we need to start tracking this competitor', I can go in and add that easily. Just add a field, and we're now able to track and input that data," explains Erin. "We also track complexity scoring, which helps us monitor team bandwidth."

What really excites Erin about the future with Loopio?

The powerful combination of automation efficiencies, with quality responses. With Loopio, Erin's team can make more informed decisions about which content helps them consistently advance. Plus, new generative AI capabilities mean that Erin's team can lean on Loopio to fill in the blanks for answers that they might not have in their content library (yet).

> "Now, with Loopio for Salesforce, it *automatically* sends RFPs that aren't a fit to self-service."

Erin Thedwall
Director of Proposals
Salesforce

salesforce

About Salesforce

Headquarters: San Francisco
Company Size: 75,000+ employees
Industry: Software Development

loopio

Learn Why 1,500+ Companies ♥ Loopio

Response management software that makes responding to RFPs, DDQs, and security questionnaires faster and easier.

Request Demo