



Zendesk Automates and Scales RFP Delivery, Increasing Efficiency up to 70% with Loopio

CASE STUDY

Outcomes

- ✓ Increased efficiency **up to 70%** across RFP responses
- ✓ **400+ RFPs** supported annually by a seven-person team
- ✓ Implemented Loopio **in 12 days**



[Zendesk](#) powers exceptional service for every person on the planet. The purpose-built AI-driven platform enhances service by combining automation and human insight for seamless interactions. Easy to use, easy to scale, and easy to get value from, Zendesk helps companies strengthen relationships, improve efficiency, and grow.

Challenge

Growing use of AI Exacerbates Legacy Tech Issues

A career in the RFP space is often a happy accident—a path that many professionals arrive at and find deeply rewarding. Jamie Sharp, Principal Proposal Manager and leader on Zendesk's RFP team (RFP Central), is a perfect example of someone who found her calling.

She'd been working in sales at Zendesk for nearly four years when she decided to join Zendesk's first complete proposal team and quickly started to lead. Leveraging her background in technical writing, it was a natural—and ambitious—move. For Jamie, the allure was in aligning process and project management, and those skills became invaluable when overhauling Zendesk's RFP process.

RFP Central responds to all RFPs and evaluation documents related to Zendesk, so Jamie and her team's first major task was finding the right tool to smooth workflows and scale operations. The team had a lot of content to leverage in their responses, but the biggest issue was finding the right content quickly. "Your content is really only as good as it is searchable," Jamie says, and their search functionality was far from ideal.

At the time, Zendesk relied on a legacy platform whose manual processes were stressful and created bottlenecks, grinding efficiency to a halt.

"It was genuinely challenging for our team to effectively leverage all the content that we had," Jamie explains. The limitations of the existing system became even more apparent with the increased use of AI across industries. "We realized very quickly that AI was going to exacerbate the issues we were experiencing with the library, like the inability to search and automate," she adds.

Recognizing these issues, Jamie and her team worked through a deep library restructuring effort. It wasn't long before she had another realization: the benefits of adopting a new solution would far outweigh the convenience of staying with their current tool.



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“Loopio is the backbone of the RFP function for our team. It supports every single document that we receive and the response that we provide to it.”

Jamie Sharp

Principal Proposal Manager
and RFP Team Lead at Zendesk

Solution

A Forward-Thinking Platform with a Strong Roadmap

As the team began evaluating tools, Loopio quickly became a frontrunner. They needed a solution that was simple to manage internally, one that demonstrated a strong trajectory and product growth, and included a powerful relationship investment.

“Having had the experience we did with the previous software, we needed a tool that wouldn’t stagnate our team, but would grow with us,” Jamie explains.

In particular, Loopio’s collaborative tools, enterprise-level AI, and integrations with platforms like Slack promised new efficiency and alignment across teams.

“AI is a really challenging component that is disrupting every industry right now. Loopio has a good handle on that and understands where the value lies. It’s very easy to work with the team to continue increasing the benefits that we can reap from AI,” Jamie says.

Powerful Relationship Investment

Loopio's partnership-driven approach also set it apart, providing the Zendesk team with strong commitment and attention to detail throughout the purchasing process.

The only thing that stood in the way of implementation was the timeline. Their previous provider wasn't flexible about extending their existing agreement, so they took an "epic" leap of faith and moved forward with Loopio without a signed contract. During that time, Loopio and Zendesk worked together to lay the proper groundwork so everyone was ready to go once they got pen to paper.

Thanks to the collective coordination and commitment, they implemented Loopio in just 12 days and proceeded to roll it out throughout Q4.

Ease of Administration and Content Organization

Once they cleared that hurdle, Loopio quickly became the heart of Zendesk's RFP operations, offering structure, scalability, and control. Zendesk has nearly 7,000 employees and information spread across multiple sources. Loopio's centralized, easily searchable library helped organize content in a way that reflected Zendesk's complexity and scale.

"We're very focused on a few specific things when it comes to content organization: product line confidentiality, vertical, and the documentation that the content is being leveraged within," Jamie says. Loopio's tagging and structure made it easy to manage these layers, allowing team members to surface the right content at the right time.

What had once been a manual, fragmented process soon flipped to one that operates as a connected function across RFP Central, analyst relations, legal, and security.



“There’s a lot of synergy between the way Zendesk approaches its customers and the way that Loopio executes in the market. That provided an extra level of confidence because we knew that we had support and we were going to be successful. It was pretty magical.”

Jamie Sharp

Principal Proposal Manager
and RFP Team Lead at Zendesk

Results

Powering Smarter, Faster Responses With Automation and Enterprise-Grade AI

Loopio has transformed how Zendesk manages hundreds of complex proposals, shifting from manual, time-intensive work to a streamlined operation that drives business.

“Loopio has been the secret sauce for our team, allowing us to reimagine the way that we work,” Jamie says. “We can be more focused on each client as we respond with more speed and accuracy.”

Since adopting Loopio, Zendesk's RFP team:

- **Increased automation.** Zendesk achieved a 30% rise in automation by leveraging Loopio's proposal automation tool, Magic. This move shifted the team away from content creation and toward response review and customization.
- **Supported 400+ RFPs annually.** Loopio enables the lean global team to manage a growing workload across regions without adding headcount. "Loopio has enabled our team to effectively and efficiently support a very high volume of requests," Jamie explains.
- **Improved efficiency by up to 70% across RFP responses.** Zendesk and Loopio worked together to design an API that integrates Zendesk with [Unleash](#), connecting their official customer-facing documentation so the team can respond faster through AI. In doing so, the team reduced SME involvement, improved response speed, and increased consistency.

"Loopio is an incredibly innovative company with a deep orientation for customer care, and we know we made the right choice in moving forward with them because this partnership has been incredible," Jamie says. "It's not only allowed me to grow and strengthen my skills, but it's also allowed us to re-envision the way that we can respond to RFPs and the tooling that we're leveraging for that."

By transforming a fragmented, manual process into a streamlined, AI-powered operation, Zendesk's RFP team has become a key contributor to business growth. They are now more capable, more efficient, and better equipped to deliver consistent, accurate responses at scale.

"It's not often that you find a tool that allows you to transform an entire team. That's exactly what Loopio has done for us," Jamie says.



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