How Celonis Uses Loopio to Win RFx, Up to 2x Faster

Success Snapshot

50% reduced RFx turnaround time

500+ global users

5 languages of RFx answers

> "I had two to three weeks of prep time to do these RFPs, including super-detailed questionnaires with two-to-three hundred questions each."

Bao Huy Lam
Manager, Competitive Engagement
Celonis

Building a Global RFx Program, From the Ground Up

Bao Huy Lam is the kind of person who loves a good challenge, and in his role at Celonis, he's turned one challenge into a career-defining opportunity: leading the first-ever Competitive Engagement team at Celonis.

After joining the company in 2019 as a solution engineer (SE), Huy found himself and his SE colleagues having to complete increasingly complex RFPs—on increasingly tight turnaround times.

This challenge wasn't occurring in a vacuum, either. Celonis was also significantly growing. Huy knew the sooner he acted to streamline the RFP process, the bigger impact he would make on the company. It was up to him to take the reins on this challenge and turn it into a success story.

By making RFPs more process-oriented, Huy knew that Celonis would "Not only improve competitive win rate, but they'd also open up more time for their teams to focus on selling and differentiating features, such as doing more customized product demos."

Plus, this would benefit their entire organization on a global scale. "We could bring in a best practice from the UK, productize it in one way or another, and leverage it in the US, or vice versa." He was up for the challenge. Now he just needed the right solution.

Solution

Develop a Repeatable Blueprint to Extend Solution Engineer Efforts

Today, Huy leads the first-ever Competitive Engagement team at Celonis, which provides strategic advice, cutting-edge tools, and best practices to win competitive projects (including RFPs) that grow their customer base.

But he knew he wouldn't be able to efficiently scale his team (and the go-to-market organization) without a clear plan for action.

So Huy reached out to others in the industry, from solution engineers to bidding teams, to learn how he could build best practices at Celonis. As Huy describes, "I wanted to better understand if there was a blueprint I could take and adapt."

And while every team was different, he did find a common thread: They all used a specialized tool to help manage RFP responses efficiently. At this point, Huy was using an RFP template that had been based on Google Sheets. "It was a good start, but it was not suitable for scale and hard to manage," he says. He wanted to shift towards a library of best practices that was accessible across the company while offering powerful automation.

So, Huy ran an RFP pilot on two different vendors, including Loopio. "It was a four or five-week exercise," he says, involving setting up both solutions in a bare-bones way. "We ran both solutions through the same case, from import to responding to it, collaborating, integrating with other tools, to exporting—the full cycle. After that, we scored each solution." Loopio emerged as the clear winner of the pilot, so Huy got to work putting a pitch together for his COO. "There was no existing budget for a solution like this, so I needed to make a business case."

"We could build ourselves a tool, but it wouldn't be enterprise-ready. I needed something automated."

Bao Huy Lam
Manager, Competitive Engagement
Celonis

> "Using Loopio, more people can help themselves, which means my team and fellow Solution Engineers get fewer requests, and the ones we do receive are more qualified."

Bao Huy Lam
Manager, Competitive Engagement
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Results

A Scalable Process with 50% Faster RFx Turnaround

Huy was given the go-ahead to implement Loopio in February 2022, and since then, his team has used it to build a self-service solution that enables 500+ global users.

Their use for Loopio is multi-faceted. "We use it for our core use cases and RFPs, as well as self-service enablement," says Huy.

That's because one of the most noticeable benefits from a day-to-day perspective is the change in time spent on RFPs. "People are spending less time on the search for information, and we're using that gained time to better customize and tailor our responses," says Huy. For example, Loopio helps people quickly find an exact answer to questions like, "Which platforms can be integrated with Celonis?"

This means that SEs can go in and customize the response for each customer with a full, detailed answer. "This is where the value-add comes in for us," says Huy. "People no longer have to find that base information."

The results? Celonis employees across the company can turn around RFPs much more quickly and easily than before. Having achieved such positive results with Loopio in such a short time makes Huy excited to look ahead. As he explains, his team is looking to improve and broaden the content and library within Loopio. "We're working on including more content from our deal desk, as well as legal and data privacy to make our sales reps self-service even easier."

Today, Huy's team is working with product marketing and other teams to improve and simplify existing content. They even built a custom workflow between their software (Celonis) and Loopio's API to make their library of 5+ languages easy to translate at scale.

While the ongoing work to streamline RFPs isn't slowing down anytime soon, Huy knows he's found the solution that will help his team forge ahead successfully.

"Using Loopio is like having a Solutions Engineer at your fingertips."

Bao Huy Lam
Manager, Competitive Engagement
Celonis

About Celonis

Celonis enables customers to optimize their business processes. Powered by its leading process mining technology, Celonis provides a unique set of capabilities for business executives and users to continuously find improvement opportunities within and across processes, and execute targeted actions to rapidly enhance process performance. This optimization yields immediate cash impact, radically improves customer experience, and reduces carbon emissions.

Celonis has thousands of implementations with global customers. It is headquartered in both Munich, Germany, and New York City, USA, with more than 20 offices worldwide.

loopio

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

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