



## Customer Success Story

*Investment firm creates efficiencies using Qvidian Proposal Automation*

### Summary

*“With Qvidian advanced search capabilities, Qvidian makes it easier for even new team members, even without industry experience, to learn NEPC and select accurate answers. We estimate that new team member onboarding time was reduced by up to 20 percent. With access to the right answers, new team members can contribute faster.”*

**Heather Martone**  
NEPC, LLC

*“With the implementation of Qvidian, the NEPC team was also able to increase the volume of RFPs by 17 percent over three years, as well as respond to questionnaires of growing complexity—without negatively impacting the quality of the response documents.”*

**Heather Martone**  
NEPC, LLC

NEPC’s marketing team delivers over 200 proposals and 100 pitchbook presentations each year. The firm also proactively invites prospects to shop NEPC consulting services through an RFP request form on their website at [www.nepc.com](http://www.nepc.com). Using Qvidian Proposal Automation, NEPC has increased productivity related to content management by an estimated **30 percent**, accelerated new employee onboarding by **20 percent**, and increased the volume of documents delivered by **17 percent** over the last three years —while reducing risk and delivering compliant content.

### The Challenge

When NEPC Marketing Manager, Heather Martone, implemented Qvidian Proposal Automation in 2011, the initial objective was to deliver highly customized Request for Proposal (RFP) responses with current, accurate and compliant information.

Prior to Qvidian, the team maintained and shared an extensive collection of Word documents. Heather Martone shared that “in order to find anything, you needed to know what documents to open. It was overwhelming to create the RFP response document—and difficult to keep the content up to date and accurate.”

By maintaining proposal-ready content in the Qvidian Library, Qvidian made it easy for all NEPC team members to quickly find the right answers. “With Qvidian advanced search capabilities, Qvidian makes it easier for even new new team members, even without industry experience, to learn NEPC and select accurate answers. **We estimate that new team member onboarding time was reduced by up to 20 percent.** With access to the right answers, new team members can contribute faster.”

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With successful results managing RFP content, Martone saw the opportunity to use Qvidian to manage PowerPoint content and automate the delivery of NEPC-branded pitchbook presentations. “For PowerPoint content, we had templates on our shared systems that were available for use by our consultants, and it was painful to maintain the content,” shared Martone. “With our success using Qvidian for RFP responses, the challenge was really an opportunity to take advantage of Qvidian’s capabilities for PowerPoint pitchbook deliverables.”



Empowering Sales, Marketing, and Proposal Teams



*“Before Qvidian, when a PowerPoint slide required an update, we updated the slide multiple times for each time that the slide appeared in a unique pitchbook. Now we maintain slide content once in the Qvidian Library—and use it within numerous pitchbooks.”*

**Heather Martone**  
NEPC, LLC

*“With Qvidian, we can enable others at NEPC. For example, a new team member supporting the Private Wealth team has become a ‘go-to’ person now that she can search Qvidian for the right information.” “Using the automated pitchbooks, the consultants who are building a client base, can ‘self-serve’ the pitchbooks that they need to be successful.”*

**Heather Martone**  
NEPC, LLC

## The Solution

In 2012, the NEPC team sought training services and guidance from the SalesEdge team to extend Qvidian capabilities for management of PowerPoint content and automation of PowerPoint pitchbooks. Heather Martone shares that using Qvidian the NEPC marketing team produces results.

- ✓ **Content Management Time-Savings.** **“The biggest time saver is in maintaining our materials. Qvidian has enabled us to reduce the time required to keep our content current and accurate by 30 percent.”** Content management is shared by all NEPC marketing team members. **“We use Word’s track changes to capture changes made to client proposals and then immediately update the content library.”**
- ✓ **Personalized and Customized Content.** **“Merge codes are an incredible time saver! This year we implemented over 200 custom placeholder merge codes that are applied to many content records—Word answer content and PowerPoint slide content. Merge Codes enable us to maintain a statistic once and immediately update numerous content records in Qvidian.”**
- ✓ **PowerPoint Content Efficiencies.** **“Before Qvidian, when a PowerPoint slide required an update, we updated the slide multiple times for each time that the slide appeared in a unique pitchbook. Now we maintain slide content once in the Qvidian Library—and use it within numerous pitchbooks.”**
- ✓ **Self-Service Tools for Other Team Members.** By automating pitchbooks the marketing team can **quickly deliver the customized client deliverables to NEPC’s consultants**, as well as provide consultants who deliver numerous pitchbooks the ability to create their own using the Qvidian.
- ✓ **Maintain Corporate Branding.** **“Qvidian makes it easy to apply your brand with control—and update your brand when needed.** This is a nice feature!”

## The Results

Qvidian Proposal Automation helps the NEPC marketing team ensure the accuracy of client deliverables—and helps strengthen the credibility of the marketing team within the organization. **“If someone in our company is reviewing a draft, and if one number is wrong, immediately the reviewer has less confidence in the marketing department’s work and the other content. Qvidian helps our team ensure content accuracy and our credibility,”** shares Heather Martone, Marketing Manager.

The bottom line is that, using Qvidian, the NEPC Marketing team consistently delivers RFP responses and pitchbooks that enable the extended NEPC team to have confidence in the accuracy of their client-facing materials.

## About NEPC, LLC

NEPC LLC, one of the largest independent, full-service investment consulting firms, brings expertise in traditional and alternative investments to a range of clients including defined benefit and defined contribution employee benefit plans, endowments, foundations, insurance, and private wealth investment programs. NEPC can be engaged as a traditional advisory consultant, or as the discretionary outsourced manager of plan assets.



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