



CUSTOMER SUCCESS STORY



Businessolver Crafts Custom Responses With Loopio

Businessolver is a benefits technology company combining a configurable SaaS platform with a high-touch service model. They understand and share the compassion, empathy, and strategic desires of HR leaders.



STREAMLINED 75
REFERENCE DOCS



MADE TIME FOR
TAILORED RESPONSES



ELIMINATED
COPY-PASTE ERRORS



RESPONDING TO
100+ RFPS PER YEAR

Before Loopio

To find the best response, Businessolver's team of three RFP writers (Sarah, Erica, and Emily) managed their knowledge repository of 75 Word documents, each containing a "Category" of content. This led to:

- Knowledge silos, with new responses not being shared across the team
- **Copy-paste errors**, including a potential risk of the wrong client name in submitted RFPs
- Wasted time, manually searching for the right response
- Stale content, as the documents were infrequently updated

Why Loopio?

Jon Shanahan, CEO, advised the RFP Team that they needed to find a software partner that was **agile and rapidly evolving**, just like them – someone innovative, who'd listen to feedback.

After talking to Loopio, the team knew they'd found the right partner. In addition to the heavy emphasis on customer feedback, they also loved Loopio's **clean, intuitive, and mobile-friendly** interface.

"We always get great feedback on how client specific our RFPs are."

Erica Yaneck, RFP Technical Writer, Businessolver



“The ability to help one another on a dime is big. To be able to collaborate without sending documents is huge for our small team.”

Erica Yaneck, RFP Technical Writer, Businessolver

Perfecting Responses With Loopio

When an RFP comes in, one member of the RFP team takes the lead. They load the questions into a **Project**, and then run **Magic** to auto-fill existing responses. Time saved through automation is re-invested in tailoring and improving their responses.

Using the **Status Bar**, the team has clear insights into their progress and remaining deliverables. If they realize they have too much on their plate, they'll **Assign** sections or questions to each other.

Consistency With Loopio

As soon as a Project is completed, the Project Lead runs **Close Loop** within 24 hours to feed their newest responses back into their **Library**.

If someone isn't sure about a response in the Library, they'll assign it out for **Review** immediately, with a comment that provides context for the rest of the team. With Loopio, the team is finally confident in their content. With a consistent and accessible content base, the team can focus on crafting tailored, well-researched responses that help Businessolver win more RFPs.

“Consistency is key. With Loopio, no matter who picks up the response, it looks the same.”

Sarah Sinclair, RFP Manager, Businessolver





Loopio's RFP Response Software Platform helps you supercharge your responses to RFPs, RFIs, and Security Questionnaires.

Ready to see Loopio in action?

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