



Collective Health®

Customer Success Story

How Collective Health Responds to Urgent RFPs With Ease Using Loopio

Success Snapshot

- 7,000 questions answered this year
- 90+ hours annually saved on manual file exporting
- 64 team members enabled to answer RFPs
- Consistent, quality messaging across all RFPs

About Collective Health

Collective Health simplifies employee healthcare with technology solutions that make healthcare work for everyone. With nearly a quarter of a million members—and clients including Pinterest, Uber, and ZenDesk—Collective Health is reinventing the healthcare experience for forward-thinking organizations across the United States.



“The admin work took time away from delivering on Collective Health’s mission. Our product makes healthcare easier to understand and navigate, but **we didn’t have an internal tool to help us navigate our own RFP answers.**”

Challenge

Time-Consuming Admin Work Prevented Sales From Delivering RFPs Quickly

Collective Health is on a mission to make healthcare easier to navigate.

However, their sales process didn’t reflect this purpose as well as it could. The sales enablement team was bogged down with RFP admin work and lacked an easy way to organize their RFP content. They had to dig through email chains, Slack, and Excel to find answers.

On top of that, their team also had to spend countless hours compiling final proposal documents, which created significant delays when responding to potential healthcare customers, who needed answers quickly.

Solution

Streamlined Process & Better Collaboration in One Platform

Collective Health needed an RFP platform that made it easy for multiple teams to collaborate and find information, and would reduce the administrative burden on the team. Here are four reasons why Collective Health chose Loopio for responding to RFPs:

- **Everyone works with the same, consistent information.** When a Collective Health team member updates an answer in Loopio's Library, the new response is instantly available to anyone who is working on an RFP.
- **By using just one platform, the sales team can easily collaborate with everyone involved in the RFP process.** With Loopio's easy-to-use interface, anyone can quickly review RFPs, add comments, and assign important questions to experts across their organization (like compliance or legal).
- **Time saving automation for tedious tasks.** The platform even auto-detects new content and auto-suggests answers for RFPs based on past submissions. Plus, it makes time-consuming tasks, like exporting an RFP, much easier.
- **Loopio scales with Collective Health.** As an innovative technology company, Collective Health constantly evolves. They appreciate how Loopio is also very focused on innovation, so the two businesses can grow together.

“Collective Health proposals are very cross-functional with lots of teams working on them. Loopio makes it **easier to collaborate and be strategic** since the admin burden is lighter.”

“It’s great to have a tool that **creates consistency and quality across our work**. The process is easy and simple so we can get proposals out the door quickly.”

Results

90+ Hours Saved and 7,000 Questions Answered This Year

Collective Health launched Loopio in December of 2019 and integrated the platform into their sales enablement process. Since then, they have achieved the following results:

- **Consistent, high-quality RFPs.** Since 60+ team members have access to the same information, Collective Health has improved their RFP consistency and quality.
- **Minimized admin work to focus on what matters.** Loopio’s export feature alone saves Collective Health a minimum of 2 hours per RFP. That’s an estimate of 90+ hours saved this year, which the team can dedicate to more strategic projects.
- **Agility to answer urgent questions, accurately.** The sales team has access to nearly 1,000 on-brand answers in Loopio’s Library, that help answer questions from potential customers on-the-fly. *(They’ll even open up Loopio while on sales calls, so they have accurate answers at their fingertips).*
- **Strategic partnership that grows together.** Loopio listens to Collective Health’s ideas and has even incorporated their feedback into the RFP platform in a recent update (the ability to import from multiple sources)



Learn Why 800+ Companies Love Loopio

Loopio's response software makes responding to RFPs, DDQs, and security questionnaires easier and faster.

See for yourself.

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