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CUSTOMER SUCCESS STORY

iovation

How iovation created sanity out of chaos with Loopio

iovation is a provider of hosted fraud prevention and authentication solutions based in sunny Portland, Oregon.

PRE-POPULATING UP TO 80% OF RFP RESPONSES

PRE-POPULATING UP TO 90% OF RISK ASSESSMENTS

COMPLETING RFPS IN 1/2 THE TIME

Before Loopio

When Tanner Volz, Technical Content Manager, first started at iovation, the company's process for responding to RFPs and Security Questionnaires was not designed to keep up with the rapidly increasing volume of new opportunities. Much of the process relied on volleying questions back and forth over email, and then manually merging everything back together.

Why Loopio?

Once Tanner started exploring RFP response software, Loopio stood out. "I looked at other solutions that were older and more complex. I was immediately turned off by that. I liked that Loopio was simple. It was focused on solving one problem and doing it well." Tanner remembers seeing that Loopio "reined in the chaos that RFPs are plagued by."

Leveraging Loopio

After importing an RFP, the team runs **Magic**, Loopio's automation tool, to pre-populate as many answers as possible with content from their **Library**. When running **Magic**, they use **Category** filters to search through their "golden" responses first.

"Something that would have taken us hours or days to pore over is now automated. We don't have to worry about it anymore."

Tanner Volz, Technical Content Manager, iovation

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> "Loopio has helped bring order to a messy process. It gives us a much greater degree of confidence that we can effectively manage projects, identify risks, and get work done."

Tanner Volz, Technical Content Manager, iovation

In a standard RFP, **50-80%** of the questions are now auto-filled with **Magic**. In risk assessments or security questionnaires which follow industry standards, it's closer to **90%**!

Using Loopio for Project Management, everyone's assigned questions are distributed automatically. Loopio sends notification emails when questions are assigned out, and administrators send reminder emails on overdue tasks using **Nudges**.

Using the **Dashboard**, administrators see a visual overview of **Project** statuses — with a breakdown of questions pending, assigned, and completed.

To keep their **Library** up-to-date, the administrators meet weekly to decide which new **Project** content they want to feed back into their **Library** using **Close Loop**.

With Loopio

Today, iovation is using Loopio to track and automate their responses to **every** RFP, Risk Assessment, and Security Questionnaire that comes their way.

> "To be able to send Nudges from Loopio is a big improvement for us. You can only write 'Urgent' in your Subject line so many times."

Julia Wotipka, Business Development, iovation

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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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