

CDW Corporation transforms global proposal processes across bid, business development, and services teams with QorusDocs

Industry: Technology

Region: United States and Canada

In 2018, CDW Corporation – a leading multi-brand provider of integrated information technology (IT) solutions and services – adopted QorusDocs as its preferred cloud-based proposal management platform in the US and Canada. It now has over 140 licensed users, working collaboratively, primarily in proposal and business development teams, with the potential of expanding to other teams.

Challenge

Identifying the need for a more efficient tool

CDW identified that the proposal management software that it had been using hadn't evolved with its business needs. That tool had complicated filters and a cumbersome search process that didn't return accurate results in a timely fashion. Previewing content took multiple clicks and windows (even to review search results).

This meant that CDW experienced difficulties with:

- Search tool robustness and time spent finding content
- Project management
- Template automation
- Reporting

CDW decided it was time to replace the proposal management solution it was using with a more efficient platform that would accelerate and streamline its RFP response process and content storage.

Solution

QorusDocs offers the most value

To begin the process of identifying an advanced content tool, CDW conducted online research and got a small cohort of its proposal writers to pilot several solutions, including QorusDocs. The users were asked to evaluate each solution's functionality, to consider improvements, and take budgetary factors into consideration during each trial.

After the corporation had tested various solutions, QorusDocs scored the best in terms of ease of use, with the ability to search content both online and within the proposal management platform.

Results

Quick and accurate RFP responses (and more!) in less time

CDW worked with a QorusDocs Customer Success Manager to configure its content into a standardized format prior to its major migration of 1,000+ records and templates.

With over 140 licenses covering a variety of users, CDW has received positive feedback from its team. They enjoy a more efficient process when searching for and storing content and save a lot of time.

The company has scaled QorusDocs to other segments, beyond proposals, and continuously evaluates any future content or license count expansions based on teams that need access to repeatable content for bids, proposals, and other customer-facing ventures.

Specific benefits reported include:

The company has been able to create and house response templates that cover all sales verticals – business, government, education, and healthcare – that its teams support. QorusDocs has allowed teams to save valuable time by automating the template-creation process.

- **Users can easily search the library** via the web version of QorusDocs and via add-ins for Microsoft Word, PowerPoint, and Excel, ensuring that no matter how they prefer to search and collaborate across teams, users get to the content they need.
- **Users are able to select multiple filter levels to search for content.** Filter levels can be adjusted by Content Managers depending on content trends and updates to product and service offerings. Content Managers are able to pull detailed reports on the most popular search terms in order to change backend keywords and tags for even more targeted search outcomes.
- **Users are able to conduct side-by-side research** while crafting responses, which means they can search for and insert content directly in a proposal response document.
- Users can also be confident that they are pulling the **most up-to-date information available**, as templates are linked to individual library records that are kept up to date by the Content Manager.

About CDW Corporation

CDW (NASDAQ: CDW), a Fortune 500 company and member of the S&P 500 Index, provides integrated technology solutions and services to more than 250,000 business, government, education, and healthcare customers across the United States, the United Kingdom, and Canada to help navigate an increasingly complex IT market and maximize return on their technology investment.

“QorusDocs has enabled us to leverage automation to be more efficient in how we search for, create, and use content. Our users save valuable time in the proposal process as they can pull down customizable templates and search for and insert content – all within the same tool.”

Alexandra M, Senior Administrator & Content Manager

(North America), CDW Corporation

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About QorusDocs

QorusDocs is cloud-based proposal management software that streamlines RFP responses and automates proposal creation.

Intuitive and easy-to-use, QorusDocs enables teams to quickly respond to RFPs and create personalized, professional-looking proposals in minutes instead of hours, directly from Microsoft Office apps and popular CRM systems.

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