

Teladoc Health: Optimizing the Sales Response Process with QorusDocs, Highspot & Salesforce

Industry: Healthcare Insurance

Region: United States

With content sprawled across the organization, sales and proposal teams often struggle to find the content they need, when they need it. Multiple disparate sales tools and a lack of governance over content management compromise the sales response process and hinder revenue growth.

Forward-thinking companies, like Teladoc Health, have addressed these challenges by creating a single, unified experience for the sales user with the help of an integrated tech stack that includes sales enablement, proposal management, and customer relationship management (CRM) platforms.

Our CEO and co-founder, Ray Meiring, sat down with Tracy Warren, VP of Marketing Enablement at Teladoc Health, and Jake Braly, Highspot's VP of Strategic Alliances, for a chat about how Teladoc is using QorusDocs, Highspot, and Salesforce to accelerate and optimize its sales response process.

Challenge: Content chaos

Teladoc's mission is to transform the healthcare experience and ensure everyone has access to the best healthcare, anywhere in the world, on their terms. From on-demand urgent care to support for chronic and complex health challenges, Teladoc is changing the way people access healthcare by delivering whole-person virtual care to consumers across multiple touchpoints.

On the operational front, the company faced several challenges around content management, proposal creation, and sales initiatives:

1. Teladoc had a proposal management system that wasn't being used. Instead, all of the company's content existed in Word documents, organized in an ineffective file folder system and spread across the enterprise. The company needed a tool that could help the sales and proposal teams

find up-to-date, on-brand content to create personalized, engaging proposals and pitches.

2. The various sales teams within Teladoc were using different sales tools to create proactive and/or "DIY" proposals. The tools were inconsistent, often cumbersome to use, and several required vendor intervention to make the simplest change.
3. In 2020, Teladoc acquired InTouch Health and merged with Livongo Health, creating a complex environment of multiple systems and content repositories. Teladoc needed a way to bring together the content of all three companies into one cohesive system to enable sales teams to quickly find the most effective content for their critical sales documents.

Solution: The power trio

Teladoc is leveraging an integrated solution that includes sales enablement (Highspot), proposal management (QorusDocs), and CRM (Salesforce).

Highspot: Single user experience

Serving as a central point of truth, Highspot enables the sales team to access all sales-related content in one place, instead of having to search a range of systems to find the desired content. Highspot enables the Teladoc team to find the content that matches the various sales scenarios and offers guidance on how to use that content effectively. To optimize content and improve sales performance, Teladoc can also take advantage of Highspot's holistic sales enablement approach, including onboarding and training, ongoing coaching, and AI-driven analytics.

"Existing content management systems (CMS) and digital asset management (DAM) systems aren't designed for sellers to find and use content in a relevant way," noted Braly.

“Contextual guidance around how to use content in the most effective way is critical for closing sales—and this is where the integration of Highspot and QorusDocs really shines.”

QorusDocs: Streamlining proposal creation

Proposals are critical sales documents for Teladoc—especially given the pandemic-driven surge in remote selling, as sales professionals navigate the shift to conducting business in the absence of face-to-face interaction with prospects. And with larger buying committees weighing in on the purchase of products and services, powerful and compelling proposals are truly critical for winning business. QorusDocs enables the sales team to rapidly create personalized, engaging proposals to accelerate revenue and reduce deal cycles.

“We’re using QorusDocs for a number of reasons, including the fact that the content lives in our environment and we’re pleased with the customer service,” said Warren. QorusDocs integrates into the Salesforce and Highspot experiences. At the ideal point in the sales process, Highspot recommends a proposal template from QorusDocs to the sales user.

“When a salesperson starts to create the proposal, QorusDocs looks for signals from Salesforce and Highspot to know what’s the best content to use—not only to ensure accurate pricing, but also to make sure it’s visually compelling and has the right branding and personalized content,” said Meiring.

After the salesperson generates the proposal, the document can be stored in Salesforce and used in pitches. Teladoc can also track insights into how the prospect is engaging with the proposal. QorusDocs uses this data to inform content recommendations for future sales response documents.

“With QorusDocs and Highspot in our stack, we’re able to generate meaningful reporting,” noted Warren. “We can see whether certain proposals are helping to increase win rate, for example, and then we can continually improve our content based on the outcome of that data.”

Integration for the win

The seamless integration of Highspot, QorusDocs, and Salesforce creates a consolidated user experience within Highspot that helps streamline the sales response process and elevate the customer conversation. The Teladoc team

knows where to go to get their content; they’re able to work within environments they know and love; and sales reps can create highly personalized, on-brand, and accurate sales proposals—quickly and efficiently—to help boost win rates and accelerate the sales cycle.

Looking ahead

As companies like Teladoc evaluate their martech and sales tech stacks moving forward, certain capabilities and functionality will be integral for a streamlined and effective sales response process:

1. Personalization

Personalization is a critical element of the sales process. While we tend to think of personalizing proposals to meet the unique needs of each prospect, an array of content gets pushed out from the sales team: whitepapers, case studies, presentations, and more. “Growing and expanding personalization into a range of assets that a company produces will be increasingly important moving forward,” said Meiring.

2. Deep integration

Full integration of technologies and tools in the sales stack will help the salesperson do their job better. As we pull more data from integrated platforms, we can take more signals from the buyer to make content smarter and more personalized, to make sales training more effective, and to help the sales team get greater results.

3. Evolution from efficiency to effectiveness

While automated solutions that increase the efficiency of the sales response process have become an important established baseline within the sales tech and martech infrastructure, the evolution continues. “We’re moving from an era of efficiency to technologies that focus on effectiveness, which is a higher order of value,” said Braly. “It’s no longer just about saving time; it’s about doing more with the time you have. If you can accomplish that, you move from a bottom line focus to a top line growth focus.”

[Watch the full conversation](#) between Tracy, Jake, and Ray and learn more about how Teladoc is using QorusDocs, Highspot, and Salesforce to streamline the sales response process to build a scalable and predictable revenue engine.