

Scaling Smarter: Insight Automates Complex SOWs and RFPs with QorusDocs

With QorusDocs, Insight transformed its Services business proposal workflow. The team now benefits from a centralized content library and better collaboration across regions. Other advantages include:

- Hours saved on every bid
- Faster, higher-quality responses
- Stronger branding
- Greater consistency

QorusDocs has become more than a proposal tool; it's a strategic system embedded in Insight's Services infrastructure.

The Challenge: Scaling Service Contracts in a High-Stakes Environment

When you're managing a high volume Statements of Work (SOWs) annually from across a global Services business, manual or outdated processes aren't just a nuisance—they're a bottleneck. That was the reality for Insight Enterprises, a Fortune 500 solutions integrator delivering cloud, data, and edge technology transformation services to clients worldwide.

Their legacy system, Livelink by OpenText, had become more of a hurdle than a help. Lacking in customizability and data visibility, the tool couldn't keep up with Insight's fast-evolving services business.

"It was not very customizable, and the reporting capabilities did not provide good visibility to important data," notes Patrick McGinnis, Sr. Product Manager – Global Business Solutions at Insight. "A lack of accessible integration capabilities left it as more of a stand-alone tool."

With inefficiencies mounting and cycles stretching longer than acceptable, Insight needed more than a plug-and-play fix. They needed a platform flexible enough to model their complex workflows, and powerful enough to deliver real operational insight.

The Solution: A Tailored Platform That Fits the Business

In 2018, Insight partnered with QorusDocs to implement a solution that would meet the demands of their unique services contract lifecycle.

As part of the rollout, QorusDocs integrated seamlessly with Insight's broader tech stack, helping streamline processes across departments. "The integrations with other systems enable a quicker and more accurate lead-to-cash lifecycle for Insight," says McGinnis. "The routed workflows and auto assignment of work are big time savers." These built-in efficiencies were especially important for a company of Insight's scale, where every delay or holdup can compound across dozens of teams.

What set QorusDocs apart for Insight? The ability to adapt. Rather than forcing Insight to mold their process to the software, QorusDocs delivered a custom workflow engine that aligned to the reality of Insight's operations—supporting nuanced workflows across Sales, Operations, Services Delivery, Finance, Resource Management, and Audit teams.

"QorusDocs enabled Insight to meet the needs of its very complex Services Business and the high volume of agreements that need to be processed annually," states McGinnis. "Having this custom capability helped improve efficiency by enabling routing of the right work to the right person at the right time."

Key capabilities included:

- **Deep SharePoint integration** for centralized content storage
- **Automated routing** and **task assignment** for faster document turnaround
- **Custom data reporting** to improve performance tracking and support downstream systems
- **Adaptability** to continually refine workflows as business needs evolve

Over time, QorusDocs has become more than a proposal tool; it's a strategic system embedded in Insight's Services infrastructure.

The Impact: Essential to the Lead-to-Cash Lifecycle

While financial metrics remain internal, the qualitative benefits are clear.

1. Efficiency Gains

Automated workflows have normalized cycle times, even in the face of high document volume. "This has created a normalized cycle time which helps support Insight's lead-to-cash SLAs," McGinnis notes.

2. Data-Driven Decisions

The data feed from QorusDocs into Insight's Azure DataLake has created a backbone for reporting, forecasting, and decision-making across Services. "The ability to accurately track and report on Services activity and the downstream integrations... drive our Services resourcing, deal tracking, and delivery functions," McGinnis explains.

3. Organization-Wide Adoption

QorusDocs is now the go-to system for all material SOWs and RFPs at Insight. "User adoption is very high," states McGinnis. "We have largely eliminated other modes of processing Services contracts or RFPs in the company."

4. Continual Optimization

Even with a mature implementation, Insight continues to explore enhancements. The team is currently evaluating QorusDocs' AI, to see how it could further streamline their highly customized workflows.

"Our partnership with QorusDocs has grown in maturity and value over the duration of our relationship," said McGinnis. "Qorus provides Insight with a solid application platform to enable a strategic piece of Insight's Services Business globally."

Looking Ahead

As Insight continues to evolve its Services delivery model, QorusDocs remains a critical partner in enabling scale, agility, and customer focus.



"In the 7 years that Insight has been using QorusDocs globally, we have seen it grow from a quality check on statements of work, to usage on tens of thousands of documents annually. QorusDocs is very flexible, and has given us visibility to what was otherwise a black box. With this visibility, you can measure results and improve them. That's so valuable. Plus, we constantly use the data that we mine from QorusDocs to improve decision-making and further enhance how we engage with customers."

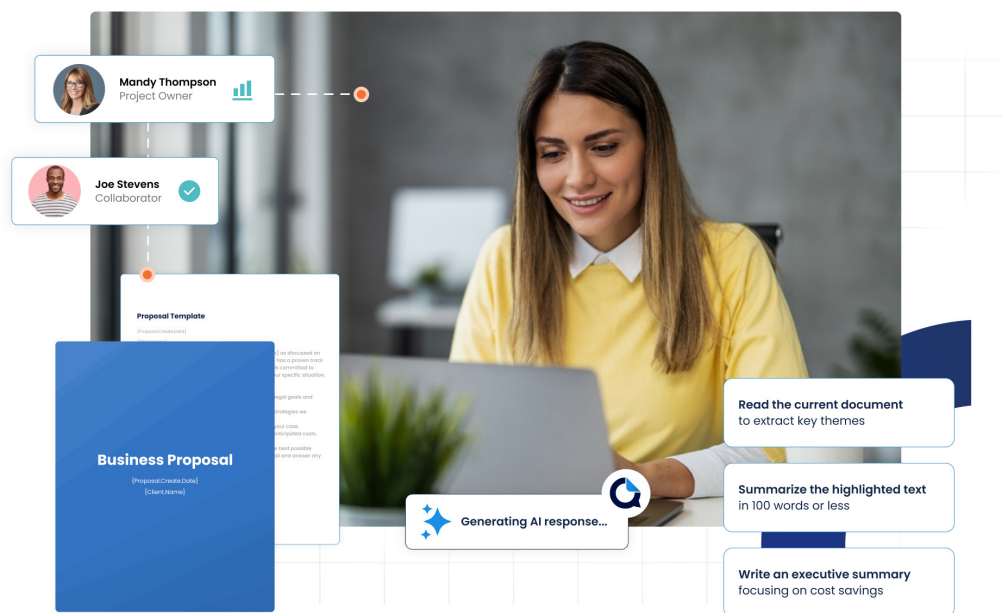


Patrick McGinnis
Sr. Product Manager – Global Business Solutions at
Insight

The journey isn't over—but the foundation is strong.

About Insight Enterprises

Insight Enterprises Inc. is a Fortune 500 publicly traded global technology company that focuses on business-to-business and information technology (IT) for enterprises. Helping businesses accelerate digital transformation, Insight offers IT solutions and services like cloud, data, AI, cybersecurity, and intelligent edge. Insight helps clients manage complex IT environments, simplify processes, and improve business outcomes. Visit www.insight.com



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