



## Customer Success Story

### Warren Averett Wins More Business with Qvidian

“With an array of Warren Averett affiliates, we pride ourselves on being a one-stop shop for our clients. And for our marketing team, Qvidian is a one-stop shop providing for all our proposal and marketing materials. With Qvidian, we have resources that provide the same efficiencies that our firm offers.”

“Qvidian gives our people the chance to do what they love. Marketing focuses on creating A+ proposal documents. Business Development gets to do what they love—develop new business.”

Tiffany Johnson  
Marketing Coordinator,  
Warren Averett

#### Summary

Warren Averett is a family of companies ranging from a CPA firm to asset management and technology solutions, staffing and recruiting and so much more, with nearly 900 employees, including 400 ‘rainmakers’ engaged in business development, across 15 offices. The Warren Averett marketing team sought out a more efficient and consistent way to deliver proposals that conveyed the high-quality service and innovative solutions offered by the Firm.

By using Qvidian to automate sales proposal documents, as well as respond to RFPs, the Warren Averett marketing team scaled its process to quickly create highly professional sales proposals for their growing organization. Using Qvidian, the marketing team empowers Warren Averett’s ‘rainmakers’ to focus on building and strengthening relationships with clients and prospects—and win more business.

By teaming with SalesEdge, the Warren Averett marketing team can now create a highly professional, 30-page proposal tailored and personalized to each client or prospect within an hour—that in the past, took over a week to develop.

#### The Challenge

Warren Averett takes pride in the delivery of high-quality work and the innovative solutions it provides to clients. It is important to the Firm that its employees are successful. With growth through acquisitions, Warren Averett expanded its services and solutions, geographic locations, and number of employees. As many expanding organizations experience, processes that were successful in the past, did not scale well.

For example, technologies used to create well-designed proposal pages did not lend themselves to automation—or scale to the increasing volume of proposal documents. Team members opted to use the most recent proposal and manually search and replace content to tailor the document for the next opportunity. This time-consuming, manual process presented document quality risks—and likewise, could not scale for the growing organization.

Another challenge was related to branding. Warren Averett benefitted from an established well-known brand. However, it needed a proposal solution that would efficiently enable the marketing team to apply the Warren Averett brand to the newly merged and affiliate companies—as well as capitalize on the former brand each of the companies had established.



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## The Solution

With Qvidian offered by SalesEdge, Warren Averett found a proposal solution that supports its multi-faceted organization.

Initially, the marketing team had used Qvidian to keep content organized and current for RFP response. With guidance and training from SalesEdge, the team scaled their Qvidian application to create highly professional selling materials including sales proposals, qualification proposals—essentially a proposal without pricing, and introductory cover letter proposals. Tiffany Johnson, Marketing Coordinator at Warren Averett identifies the results:

“We’ve learned that the more you can use the client’s name in the proposal, the better your success rate. Using Qvidian, we enter the client’s name once, and the document is correctly personalized throughout.”

“By tailoring proposals for each client, it shows that we are listening, and we understand what the client wants. Qvidian’s document automation makes it feasible to generate custom documents quickly.”

Tiffany Johnson  
Marketing Coordinator,  
Warren Averett

- > **Scaled Marketing Resources.** “Our team of 4 produces what would require 13 professionals without Qvidian.” “Before Qvidian, it took us a week to create a 30-page proposal. Now, we can do it in an hour.”
- > **More Timely Response.** “Automation makes it feasible for our team to quickly respond to an opportunity. For example, a qualifications proposal may be requested in the morning and delivered to a client before lunch.”
- > **Persuasive Proposals.** “Our proposals reflect the quality of service that Warren Averett delivers. Using Qvidian, we can quickly select the right content and personalize the proposal document for the client. In fact, clients have asked us how we prepare our proposals so they can consider using the same proposal automation solution.”
- > **Increased Overall Win Rate.** “By delivering highly professional proposal documents, Warren Averett has won more business—many times bypassing an RFP event.”
- > **Confidence in the Content Accuracy.** Qvidian makes it easy to keep content current and accurate. “We know that we are delivering consistent high-quality documents, with the right content, across the Firm.”
- > **Strengthened the Brand.** “Our proposals are our brand! As we merge with new companies, we use Qvidian to strengthen the cohesive Warren Averett brand and help our affiliates take advantage of established brand.”

## Partnering with SalesEdge for Continued Success

Warren Averett’s Tiffany Johnson is “passionate about telling others how SalesEdge and Qvidian has empowered the Firm’s marketing and business development teams.”

SalesEdge provides Warren Averett with ongoing training, best practices and guidance allowing the marketing team to be more innovative with Qvidian. The Qvidian-automated Warren Averett proposal documents have actually reduced the requirement to deliver RFP responses. Because of Qvidian, Warren Averett quickly responds to business development opportunities delivering persuasive proposal documents helping the firm win more business.