



Accounting Services

Qvidian Solutions

- RFPS
- CONTENT LIBRARY

“With the support of Qvidian, we are not only competing more effectively to win our customers’ business, we are building client relationships rooted in trust and confidence.”

– THERESA WEBSTER,
Marketing Manager, Proposals
and Pursuits, EKS&H



EKS&H

AUDIT | TAX | CONSULTING

Qvidian Helps EKS&H Build Relationships

EKS&H understands the unique challenges and opportunities their customers face. From humble beginnings nearly 40 years ago, EKS&H has grown to more than 60 partners and 650 team members. They believe in giving their customers honest and objective advice; helping them understand their options; and, most importantly, helping them achieve their goals. Because much of their business comes through RFPs (requests for proposals), EKS&H needed to find a way to use their proposals to begin to build relationships with prospects. They found their answer in Qvidian.

BUSINESS DRIVER

Many people see audit and tax services as a commodity and choose according to price. At EKS&H, they see themselves as true business advisors with relationships built on trust and expertise and it’s critical to communicate that to potential buyers.

Language is extremely useful in that endeavor. Many times, EKS&H doesn’t have an opportunity to meet face to face with their prospects and customers when delivering a proposal; they can only provide the RFP response documents they create. EKS&H needs the language and style of writing in those RFP responses to represent what prospects would hear if they met with them in person.

APPROACH

Qvidian strongly encourages customers to

customize and personalize their writing and provides training and support in this area in addition to their proposal automation software. Customers are able to store their customized content in a central repository for all to use.

When EKS&H started with Qvidian, the whole idea of content management and automation was new to all of them. It was a different way of handling proposals, but they saw how this technology could help them grow while actually enabling them to maintain and enhance their human connections—both internally between the firm’s marketing team members and its partners and externally between EKS&H as a firm and their prospects.

EKS&H signed on with Qvidian and made the wise choice to participate in many



EKS&H embraced Qvidian and in doing so, achieves key differentiators in a crowded market:

- Builds relationships with prospects and customers based on personalized RFP responses
- High efficiencies
- Increased collaboration
- Empowered partners
- Ability to stand shoulder to shoulder with larger firms

of Qvidian's support and educational opportunities such as the Qvidian annual user conference, on-going professional services and training, and Qvidian's weekly Q&A sessions.

IMPACT

"At EKS&H, we're proud that our customers see us as their trusted business advisors," stated Theresa Webster, Marketing Manager, Proposals and Pursuits for EKS&H, **"and Qvidian has truly helped us build stronger relationships by making it easier to personalize our message,"** she remarked.



EKS&H makes effective use of their Qvidian library. They consider the library a very dynamic, fluid repository. They're able to easily keep an eye on what's out-of-date or up-to-date, and that gives the marketing team the opportunity to focus on **continuing to polish the language, making it more personal and familiar, yet professional, helping to convey the human qualities of their business.**

With Qvidian, this messaging can be applied more broadly. **Qvidian offers more than just content management and automation. They also teach customers how to improve their proposals through valuable sales methodology and insight.** EKS&H adopted these principles which interface perfectly with the *SPIN Selling*

strategies that their partners use. **That, along with the efficiency and consistency that Qvidian provides, has helped EKS&H stand shoulder to shoulder with their bigger competitors in larger, more complex pursuits.**

"Many times, when we've made the first cut in the selection process and our partners have asked their prospects, **"Why are we here?" they have responded that it's due to the quality of our proposals,"** remarked Webster proudly.

She continued, **"As I said, relationships are key to our success and that includes our relationship with Qvidian. We view Qvidian as a valuable solution and are cognizant that we're always expanding our use of it, not just in the number of people accessing the system, but how we are using it and what we can do with it."**

Internally, Qvidian has allowed the marketing team to be active, strategic proposal advisors to the firm's partners. **"As a matter of fact, our CEO has said, of the many contributions marketing has made to the firm, our assistance in producing higher quality proposals and more competitive pursuits are at the top of the list,"** Ms. Webster stated.



She stressed that **"With the support of Qvidian, we are not only competing more effectively to win our customers' business, we are building client relationships rooted in trust and confidence."** Webster continued, **"While many automated solutions may distance us from each other, Qvidian's fluid and dynamic technology is actually bringing us closer together."**

