Anaplan Responds to 250+ RFPs/Year By Leaning on Ombud

With Anaplan's planning and forecasting software, finance and operational leaders across the organization can model complex scenarios, forecast continuously with added intelligence, and make agile decisions confidently. In 2015, the organization was going through quite a growth spurt. They were less than 3 years out from eventual IPO and started feeling the pain that often comes with sales requests during hyper-growth. To solve this, Anaplan partnered with Ombud to streamline, standardize, and centralize their sales response processes.

Fast forward to 2021. They're now trading on the NYSE and sustain significant growth, but with more scrutiny and complexity. At this stage, it's time to refine. The solutions consulting and pre-sales team took stock of their processes, and while they were great users of the Ombud system, it was time to elevate the quality and quantity of content within the system and leverage the Ombud team to support the influx of RFPs.

CHALLENGE

Inaccessible Content	Content for requests was under lock and key, slowing down the response process.
Inconsistent and Not Approved	RFPs were often responded to straight in the document, leaving it up to sales reps to proofread and polish.
No Central Storage	Because there was no central repository, it was rare to have the final version for future reference.
Security Documentation Bottleneck	Their SIG (Standard Information Gathering) response was not readily available when needed.
Imperfect Learning Environment	New hires would have to shadow and learn on the fly when it came to product and objection handling training.

SOLUTION

Transparent Content	Content is now all housed within Ombud and ready to use by anyone on the team.
Consistent, Professional Response	RFP responses are reviewed and approved for consistency and always delivered with professional branding.
Searchable Library	Completed, final versions of RFPs are archived, stored, and available for future reference.
Off-The-Shelf Security Documentation	Using Ombud reference documents, Anaplan now keeps their SIG updated to deliver at a moment's notice.
Self-Paced, Better Learning	In Ombud, all the knowledge they want is at their fingertips; searchable, reliable, and accurate.

RESULTS

With Ombud, Anaplan has made their RFP, DDQ, and Security Assessment responses cleaner, faster, and higher-quality. In August 2020, Anaplan also took advantage of a professional services offering called Ombud Extend. The Ombud team assists by taking the "first-pass" on requests and helping with content management. As a result, Anaplan saw a boost in their already stellar results:

53%	250+	3,200+	60%	4/week
of content is created from previous, curated responses	requests responded to each year	responses approved, curated, and ready for use in the Library	increased use of curated, reference content after implementing Ombud Extend	the average number of requests Ombud Extend takes the first pass on

> *"Customers give us feedback on our RFPs saying they're the most complete answers, faster turnaround time, and that they wish they could clone our team."*
> — Anthony Losurdo, VP, Solutions Consulting

About Ombud

Customers rely on Ombud to automate the content-centric activities in their sales processes. Our platform combines content collaboration, project management, and machine learning to streamline the creation of sales documents like RFP responses, security questionnaires, sales proposals, statements of work, and much more.

OMBUD

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