

OneStream Software Effortlessly Handles 10+ Concurrent Projects with Ombud

OneStream™ unleashes the power of finance by unifying corporate performance management (CPM) processes such as planning, financial close & consolidation, reporting, and analytics through a single, extensible solution. In 2019, they brought in Ombud on the recommendation of a new Solutions Consultant on their team, Rob Poirier. Now the VP of Solutions Consulting, Rob had used and loved Ombud in his previous role and thought it was a perfect fit for the challenges their team was facing concerning client requests.

With over 750 customers, 200 implementation partners, and over 850 employees, OneStream was receiving an increasing number of RFPs and Security Questionnaires. But, what they lacked was a dedicated Proposal Management function to tackle them. In December of 2020, they began to build this competency internally by hiring Ben Dillingham as Manager, Proposal Services.

CHALLENGE

SOLUTION

Past RFP Reliance

To create client requests, the team relied heavily on the last RFP they responded to, often stored on local desktops.

Intelligent Repository

With Ombud, the team has a centralized database housing every request their team responds to — categorized, in context, and easily searchable.

Email Round Robin

Collaboration mainly lived via email or messaging apps with the question, “Hey, has anyone seen an RFP question like this?” as a frequent staple in inboxes.

Centralized Collaboration

All collaboration, conversation, and progress tracking happen in one place. Everyone stays accountable and on schedule.

No Project Management

With no one at the heart of the process, the team found it hard to prioritize content maintenance, updates, and compliance.

Streamlined Process

Ben can easily track and report on every task for every request currently in progress. The team is held accountable, and leadership is confident in responses going out to prospects.

RESULTS

Even as a newcomer to an organization with Ombud already in place, Ben was blown away by the functionality and ease of use he experienced. With the Ombud Customer Success team by his side, he quickly came up to speed, created a seamless process using the Salesforce integration, and started generating content.

He can also manage the process for the long haul with confidence without worrying about confusing licensing structures restricting the number of concurrent projects or users he can have in the system — making his job as a proposal manager easier and more efficient.

What Ben has to say about Ombud:

“Ombud **makes collaboration seamless — I’m able to see what everybody’s doing** without having to pick up the phone, email or text team members to figure out what’s going on.”

“The Ombud team is absolutely fantastic. As I began learning and using the system, I’d fire off a question to the support team, **get a response in less than an hour**, and knew exactly what I was doing.”

50% of every client request is responded to with content already in the system

10+ concurrent requests running in Ombud at any given time

250+ client requests completed in the last year using Ombud

100+ team members collaborate in Ombud every quarter

500+ responses curated for future use

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

Let’s Get Started

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