



Case Study

Jack Henry & Associates streamlined their RFP response process with Qvidian



INDUSTRY

Financial Services

COMPANY

**Jack Henry & Associates, Inc.
Monett, MO**

jackhenry.com

Jack Henry & Associates, Inc. (JHA) is a leading provider of technology solutions and payment processing services primarily for the financial services industry. Its solutions serve approximately 9,000 customers nationwide, and are marketed and supported through three primary brands: Jack Henry Banking, Symitar, and ProfitStars.

jack henry
& ASSOCIATES INC.

Jack Henry & Associates, Inc. (JHA)

used Upland Software's Qvidian to streamline their request for proposal (RFP) process. With Qvidian, the JHA team has improved collaboration, distributed workloads more evenly, and freed up time to focus on strategic priorities. Every year, JHA answers more than 70,000 RFP questions about their portfolio of over 150 products and services.



How can a team of four effectively answer 70,000 RFP questions per year?

Jack Henry & Associates needed a scalable way to keep up with RFP responses.

At Jack Henry & Associates (JHA), a small-but-mighty four-person team handles RFP responses and is tasked with answering roughly 100 RFPs every year—each averaging 700 questions. Before Qvidian, this volume took its toll. Each member worked individually, responsible for completing all of the RFPs for designated groups of sales reps—regardless of their existing workloads.

People outside the RFP team felt the pain of inefficiencies, too: SMEs were tired of answering the same questions again and again. Responses from SMEs—when they arrived on time—were often rushed and last-minute. The team tried several different products to address these problems, but none did the job.

Qvidian helped JHA redefine their RFP process and balance workloads.

Qvidian prompted the JHA team to take a step back and reassess their existing RFP response process. Using Qvidian, they slashed the time needed to complete necessary steps while completely eliminating others. When they were finished, they'd designed a faster, less cumbersome approach.

Now that they have a dynamic central hub for collaboration and content, the proposal analysts collaborate seamlessly with each other and the SMEs they rely on. Meanwhile, a better-managed system for distributing projects has helped to balance workloads across the team and reduce stress, without diminishing the quality of the final product.

"We documented every step in our process and discovered that Qvidian could either eliminate or streamline many steps, saving us valuable time while alleviating incredible pressure on all."

– Elizabeth Grissom
Sr. RFP Proposal Analyst, JHA



JHA established more balanced and efficient processes using Qvidian

JHA removes RFP inefficiencies to accomplish more with the same resources, thanks to Qvidian.

JHA saw immediate improvements after purchasing Qvidian, but they had a feeling that the product could deliver even more value. Together, the team spent two days mapping out every step of the RFP process, from arrival to delivery. In addition to pinpointing ways Qvidian could make various tasks run more smoothly, they also found multiple steps that could be eliminated entirely. Score!

The team soon designed a more strategic way to assign their workload and ensure no one was overburdened. Using Qvidian, the team divided their 150 products by

four, giving each set to a single team member. Each proposal analyst was now responsible for keeping content records for their group of products up-to-date, ensuring that everyone could source information with confidence.

What's more, JHA broke up the components of each RFP, allowing the team to work in tandem rather than silos to get the job done. With balanced responsibilities, no proposal analyst bears the brunt of the workload.

With Qvidian, JHA increased quality and unlocked more time to focus on strategic initiatives.

Life for JHA's RFP team (and the SMEs they rely on) has gotten a whole lot easier. With

multiple steps entirely eliminated from the RFP process, they assemble proposals more efficiently. The relationship between proposal analysts and SMEs has improved, too. Instead of emailing out questions by copying and pasting them into emails or word documents, analysts request SME insights directly through Qvidian. When responses come back, it's also easy for analysts to review and incorporate them.

With the time they've saved, proposal analysts now have space to tackle strategic projects and keep on top of the constant flow of RFPs that their sales reps deliver.

Results for Jack Henry & Associates

70K
Questions answered
in RFPs annually

150+
Products detailed
in Qvidian library

100+
RFPs responded to
every year

Upland Qvidian automates away the tedious and frustrating parts of RFP response and proposal processes. With Qvidian, sales and proposal teams can collaborate effortlessly to quickly deliver polished and compliant proposals, presentations, and sales documents. With an unmatched 25 years of experience, more than 1,000 companies and 200,000 users worldwide rely on Qvidian to meet deadlines, tame proposal content chaos, and win more deals.