

# Available. Accurate. Actionable.

## Why Lockton has greater data confidence with RFP365

### The Problem

As the world's largest privately held insurance brokerage firm, providing **insurance, risk management and employee benefits solutions**, Lockton's Technology & Outsourcing Practice had their work cut out for them.

"We had **3 objectives in choosing RFP365** to replace our old system:

1. Free us to **focus on consulting** by automating administrative tasks.
2. **Replace our Excel spreadsheets** and give us more actionable data at our fingertips.
3. **Truly partner with our vendors** by making it easier for them to respond and work with us.

"We're pleased to say all three of those goals have been met."



### The Solution

RFP365 provided Lockton's consultants with the automated scoring and **apples to apples comparison** they needed. Moreover, it allowed their vendors to leverage past responses for **faster response times**.

Also gone was the need for annual RFIs, which became outdated quickly. Vendors could update their **dynamic vendor profiles** any time, Lockton always had up-to-date information.

"**We would like to see RFP365 become an industry standard tool.** We encourage sourcing advisers to try it because it will encourage more vendors to respond, since it's so easy to save their responses."

### The Success

"Before we were divided between being consultative and tracking down information.

Now RFP365 **saves us a tremendous amount of time** with countless day to day job efficiencies, **freeing us up to be** more available and **truly consultative with our clients**.

I also have **more confidence in our information now**. Not having to manually compute Excel matrices not only saves a lot of time, but it also means **more data integrity**.

Before it was so hard to keep vendor information up-to-date, using spreadsheets and legacy software. But now we can see our **vendors activity and data in real time**. **As a result, our client deliverable is much stronger.**"



## RFP 365 ROI



Actionable Information



Stronger Vendor Relationships



Enhanced Data Integrity



Freedom to Focus on Core Business

# What Lockton's vendors say about writing proposals in RFP365

## Businessolver

“At first, we were **skeptical**. We have responded to RFPs through numerous systems and we frequently ran into issues.

However, once we accessed RFP365, we were all very **pleasantly surprised**. It was a **clean and easy-to-use system that was very user-friendly.**”

 **businessolver**



**Sarah Sinclair**  
RFP Manager

## PlanSource

“We implemented RFP365 a little over a year ago and are **hoping it becomes the standard for all brokers to issue RFPs to vendors**. It provides all parties within the RFP process a productive, seamless experience that **significantly reduces the amount of time spent on an RFP**.

We believe implementing RFP365 has **deepened our partnership** with Lockton. The platform allows us to be **more efficient and precise in our RFP responses**, providing Lockton with an even better bidding experience.

**Our productivity has continued to increase in excess of 90%**. We're getting more work done, with less effort. RFP365 has been **instrumental to our success** and has solved many of the issues we experienced in the past.”

PLANSOURCE



**Whitney Russell**  
RFP Quarterback /  
Proposal  
Coordinator

## Ultimate Software

“Using RFP365 has improved our relationship with Lockton in that **we have far fewer consumer frustrations**.

The **RFP tool Lockton used previously** would sometimes **lose all our responses**, and we continually experienced timing out issues which also resulted in lost data.

We're thrilled to **no longer have to start from scratch**. Using RFP365 allows us to easily reuse previous responses, which **saves us hours**. The stored Knowledge Base means we **only have to ask SMEs new questions**, and our sales representatives love only having pricing questions to complete now versus larger sections in the RFP.

**RFP365 is the best method of completing RFP's out there!!! Superb improvement**. It's helped us **win more deals in a shorter period of time**, which is a fantastic bonus for our organization and all because of our relationship with Lockton!”

Ultimate  
SOFTWARE



**Lesa Alexander**  
Enterprise Pre-Sales  
Manager