

*“I love this product. It reminds me of the old Pragmatech products that were so popular. By far easier to use than the big cloud-based products.”*

## COMPANY

Teladoc Inc.

## INDUSTRY

Healthcare

## PROJECT LEAD

Barbara Esm Medina  
RFP Manager

## CRITICAL ISSUE

The initiative’s goals were to:

- ▶ Increase the consistency of information throughout the sales process
- ▶ Provide users a system that is easy to use
- ▶ Provide Account Managers a competitive advantage by arming them with sales-ready content

## THE COMPANY

Teladoc is the first and largest telehealth provider in the nation, founded in 2002. Teladoc’s U.S. board-certified doctors can resolve many medical issues, 24/7/365, via phone or online video consults.

## CURRENT SITUATION

In the Healthcare industry, to maintain a competitive edge, it is important to have customer-ready content available to RFP teams, Sales Teams, IT, Subject Experts and Clinical Services in order to create articulate and consistent responses to business questions and opportunities.

Teladoc also uses a cloud-based system to house their mission-critical content but found it to be over-complicated and therefore under-utilized.

## SOLUTION

*Improve content consistency and user adoption through Expedience Content Portfolios and Outlook Content Galleries.*

Teladoc implemented the Expedience Microsoft Word-based Content Portfolio, Outlook Content Galleries, and an automated Frequently Asked Questions (FAQ) document for the Account Managers and Sales Team.



*“The RFP team handles a lot of internal requests for information. I would like to give the SMEs for each department their own portfolio. I hope to eventually roll it out to several departments that we will supply with custom portfolios of just the content that they use.”*

- Barbara Esm Medina

*“I especially like the automation features that let you make blueprints to automatically generate updates for documents like FAQs and admin manuals.”*

According to Barbara Esmolina, RFP Manager, “My experience has been that outside of the RFP Team, it is very difficult to get anyone to use a database tool of any kind. Expedience is so easy and very intuitive, and because the content actually resides in Microsoft Word and Outlook, where our teams are already working, they use it.”

“I like that you can have multiple smaller collections of content in manageable mini-databases” continued Esmolina. “That makes it much easier to share the content with other departments who get questions from clients.

More people outside of the RFP department use it because it requires little to no training. They are actually finding it fun to use.”

Esmolina concluded, “As an original RFP Machine user, I really missed RFP Machine and this has many of the features I missed in that software (Word integration, blueprints, and more). I use it to automatically generate our FAQ documents the way I used to do with Pragmatech’s Proposal Assembler. Much easier to keep updated than our cloud-based backend database system. I can think of so many uses for this beyond RFPs.”

## **ABOUT EXPEDIENCE SOFTWARE**

Expedience Software is recognized as a market innovator in the RFP/RFI automation industry providing simple solutions to respond quickly and accurately to revenue opportunities resulting in a greater volume of responses and increased win-rates. Expedience Software serves financial services, asset management, healthcare, legal, business services, manufacturing and technology organizations.



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