



## How RocketDocs Transformed a Leading Global Bank's Workflow

### Success Highlights

With 105 RapidDocs templates, the bank didn't just improve document generation—it redefined it. Output surged with airtight compliance built into every step. The proposal process scaled effortlessly, enabling 250+ users across 35 countries to work faster, execute flawlessly, and operate at a level never seen before.

### Company Snapshot



Industry  
Finance



Company Size  
10,000+



Location  
Global



[www.rocketdocs.com](http://www.rocketdocs.com)

# Requirements

## Scalable

- 1 This global banking enterprise needed a high-performance, scalable platform to drive efficiency across 35 countries.

## Quality Output

- 2 The software had to support hundreds of users, manage an immense content database, and deliver high-quality, branded pricing proposals instantly.

## Security

- 3 Security, compliance, and role-based access controls were fundamental —this solution had to exceed industry standards, not just meet them.



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*RocketDocs has competitors in the space. But none of them can do what RapidDocs does. I haven't found any that are as good in product suite. So RapidDocs, from my perspective, is pretty unique. It's a great tool. It can save you time. It can help you to do things a lot easier.*

*–Vice President,  
Global Leading Bank*

## Approach

The team built out 105 RapidDocs templates—covering every scenario and customer across their lines of business, utilizing their developed content library. This knowledge base housed company information, financial products, pricing options, and other company-wide and departmental data they may need.

By utilizing a permission-based, pre-approved picklist of content records, the team generated 7,600 RapidDocs throughout the 15-year partnership. This streamlined process ensured quality control and saved valuable time. The exports included Word documents, presentations, and PDFs.



## Impact

In minutes rather than hours, the team generated high-quality, branded proposals, transforming the entire process.

The customized templates ensured efficiency, consistency, and compliance across its global operations.

## Results

Always up-to-date pricing, along with a reduction in errors and inconsistencies, were the result of the team having one centralized content library within RocketDocs.

The ability to produce these RapidDocs demonstrates the scalability and effectiveness of the solution. Users across all global markets could now efficiently create proposals with confidence, reinforcing both internal productivity and customer trust.

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*Depending on the type of business somebody is doing, RapidDocs has so many more opportunities to be used than just for proposals. You can use it to generate contracts—anything where you need to repetitively pull the same type of text and potentially piece it together in different ways—you can use RapidDocs.*

*—Vice President, Global Leading Bank*

## Simplicity of Use

With regard to content process, “Generating a pricing proposal, even for very complex pricing, with RapidDocs, takes 5 minutes. Look into your organization to see if there is more than one place where you can make use of the tool. Use it as much and as broadly as possible,” said the bank’s Vice President.

## Reliability

He emphasized the platform’s reliability, adding, “RocketDocs is one of the most stable systems or services that I’ve seen. For any minimal issue that we had, they are always very quick to respond. If possible, it was fixed within a few hours. If not, we got quick information on what’s going on and what would be happening.”



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RapidDocs should save you quite some time. Probably 60–70% compared to other approaches.

*—Vice President,  
Leading Global Bank*