TREND ALERT:

How a Response Management System Enables Remote Working

RocketDocs
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Whether working in another office location or from home, collaborating with and engaging remote workers is an ongoing challenge. In today's environment, we are undergoing a digital transformation beyond anything we could've anticipated. A global pandemic is only one example of why shrewd business continuity practices are more important than ever — customers demand it and the disruption of unexpected down time can potentially equate to lost trust and revenue.

With so many solutions to manage, RocketDocs has your response management and sales enablement covered. Our cloud-based platform and mobile sales engine provide flexibility, collaboration, and reliability to work anywhere, giving you peace of mind that business continuity is assured regardless of the physical location of your sales and marketing staff. View our Security Highlights here.

Plus, our zero IT footprint means that users can interact seamlessly with Microsoft Word and Excel using our new LaunchPad™ add-in — you get the best of both worlds with an accessible and reliable online platform that conveniently integrates with your native Microsoft Office products.

Here are five ways the RocketDocs 2.0 response management system ensures continuity and lets stakeholders work from anyplace — even on the road.

01 EXPANDED USER ACCESS

With RocketDocs 2.0 we've expanded our user license types, giving you the option to broaden the universe of people with self-serve access to the content library, thus empowering stakeholders to self-service and get more involved.

In addition to the full-access standard core user license for administrators, proposal writers, and content managers, we've added three additional tiers for enhanced flexibility, collaboration, and transparency:

- Read only access allows you to increase the number of users who can access and search the library for content they can then copy and use as they wish.

- Contributor access allows subject matter experts (SMEs) to review, edit, and create content. In fact, all subject matter experts have free, limited, access to RocketDocs 2.0, for a more complete and compliant content database.

- Field user access to RapidDocs™, our self-service mobile sales enablement engine, relieves pressure from proposal teams by allowing field teams to assemble any document from an approved library — whenever and wherever they need it. For more information about RapidDocs™, go to www.rocketdocs.com/rapid-docs/.

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Expanding user access to the knowledge base and its collaboration features is an extremely powerful tool, particularly, when employees are working remotely.

02 PACKAGED PROJECTS

RocketDocs 2.0 you can compile all documents, correspondences, attachments, etc., in one place, allowing easy stakeholder access to the pertinent project details and files. The project owner will also use this workspace to assign team members and their permission levels, kick off a collaboration email notifying them of their participation in a project, and set up additional project tasks that can be assigned out and tracked.

Storing all key project information and documents in one place saves time, ensures that easy access, and puts the information at users' fingertips at all times.

03 BUILT-IN COLLABORATION TOOL

New to RocketDocs 2.0 is a built-in collaboration feature that facilitates efficient communication among the project contributors. Rather than hunting for an email message you sent to an SME last week, all discussion threads are included within the project workspace for quick and easy recall.

04 ASSIGNMENTS

Whether assigning tasks, initiating content reviews, or requesting new content, our assignment feature simplifies and automates the process for you. Your SMEs will receive an email with a link containing their assignment and directing them back to RocketDocs to complete.

You can also set up and assign other tasks. For example, if an RFP requests references, a custom pricing proposal or requires a cover letter, you can create tasks in the project workspace and assign it accordingly.

All tasks are stored in the Workbench for quick access, making it easy for contributors to see all their outstanding assignments in one spot.
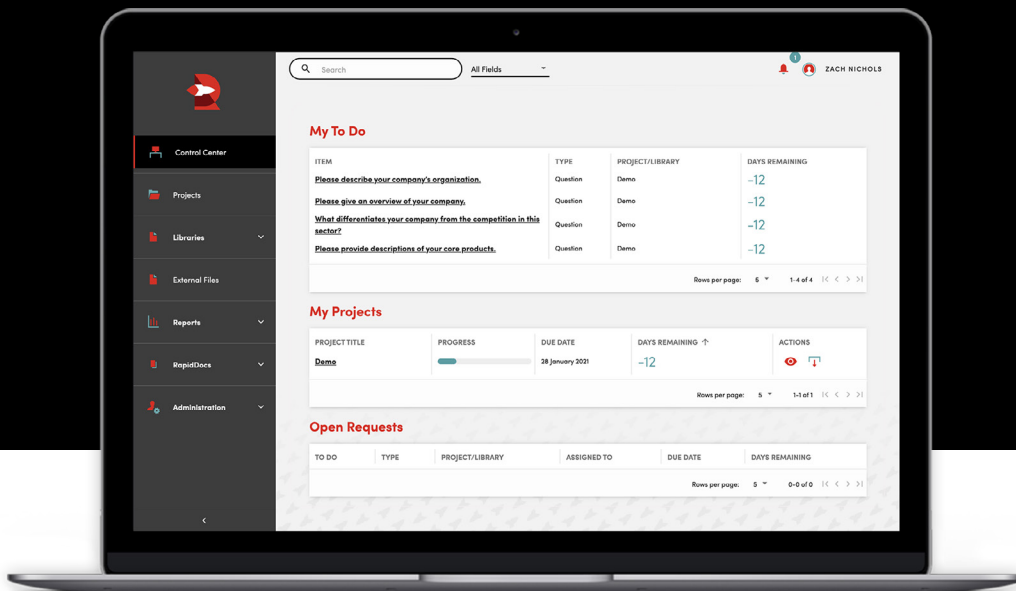
05 COMPLIANCE-DRIVEN WORKFLOWS

Remote working requires clearly defined processes and expectations. Defining custom workflows that conform to your process is easier than ever in RocketDocs 2.0.

Content approval workflows are 100% customizable and are assigned at content creation. Future content reviews can be initiated with a click of a button, pushing the content through the entire workflow to ensure compliance.

Project workflows are also customizable to the needs of your organization in order to align with your unique processes for the various project types. We understand the importance of maintaining compliance-driven workflows and automating this process to save time, so your teams can focus their attention where it matters most – on landing bigger, better, faster wins

With custom project approval workflows (illustrated below), RocketDocs adapts to you.

RocketDocs is the response management and sales enablement hub that will provide your employees with a single source of truth; enabling them manage their proposals start to finish and generate on-the-fly sales documents.

RocketDocs is a secure, reliable, flexible solution that will support your proposal and sales teams anytime and anyplace.