

TREND ALERT:

# One-Stop Shop for Content & Sales Enablement



**RocketDocs**  
Launch. Boost. Land.

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Your content library is a powerful business asset. Not only is it your lifeline for completing RFPs, but it can also be leveraged in numerous other ways. When you partner with RocketDocs, you will discover the benefits of having a one-stop shop for content and sales enablement that offers increased marketing efficiency, sales productivity, and risk mitigation.

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The first step after engaging RocketDocs is to build an intelligent knowledge base, a single source of information that will eventually become so much more than just a collection of Q&A pairs. Your response library, along with other marketing materials, graphics, biographies and org charts, RFP attachments, sales collateral, etc., can be managed and maintained within RocketDocs and leveraged for proposals or sales documents beyond RFPs. Not only that, it will become your central archive of all submitted materials and bid responses.



One of the most exciting enhancements with the new RocketDocs 2.0 platform is that it allows you to expand the universe of users who have access to the system. A read-only user license and unlimited SME accessibility enables company-wide collaboration and quick access to the knowledge base, giving your sales team on-demand access that expedites client and prospect inquiries, decreases response times, increases sales momentum, and fosters client confidence. Because the knowledge base contains approved and compliant content, you can feel confident with your sales staff going straight to the source rather than involving others whenever they need something. In addition, your sales staff can further engage in the content management and bid proposal process through the use of built-in customizable workflows.

That said, not all sales professionals need access to everything in the knowledge base. RocketDocs gives you flexibility to control what people see through user-based permissions so you can decide who has access to what. Your Customer Success Manager (CSM) will work with your administrator to architect the database in a way that conforms to your business needs.

As we mentioned earlier, there is so much more that RocketDocs can do for you beyond content management and reactive bid proposals. Let's explore 10 additional ways in which RocketDocs can be your one-stop shop for content and sales enablement.



## 01 PROACTIVE PROPOSALS

RapidDocs™, our mobile sales enablement engine, assembles and configures relevant content on-the-fly, empowering your sales team to respond to urgent requests or create instant proposals. In the fast-moving sales world, it's critical that you're able to supply accurate, branded, compliant, consistent, and timely materials with your company's messaging. RapidDocs™ lets you pull content from an approved library and create whatever document you need — whenever and wherever you need it.



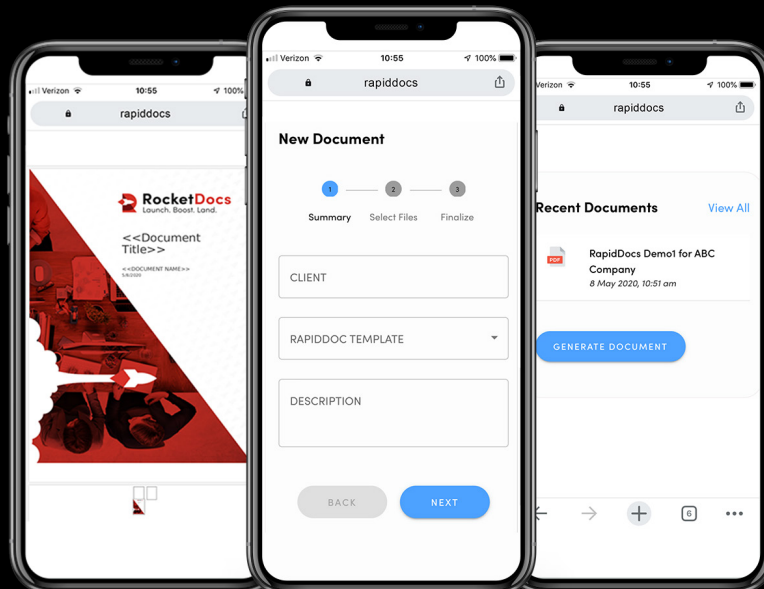
## 02 SALES TEMPLATES

RapidDocs™ can also house a variety of other dynamic templates that allow your field teams to auto-generate materials such as company overviews, statements of work, quick quotes, order forms, fee proposals, and so on.



### 03 MOBILE CONNECTIVITY

Using the RapidDocs™ mobile application, your sales team can assemble and fulfill immediate inquiries right from their mobile devices — RapidDocs™ on the go!



### 04 SALESFORCE INTEGRATION

RocketDocs has built-in Salesforce integration, further enhancing the sales engagement process in order to capture the full life cycle of your clients and prospects.



### 05 CLIENT DDQ AUTOMATION

RocketDocs can help you track recurring client DDQs so you can anticipate and plan resources accordingly. While these questionnaires can be quite lengthy, they are often identical year after year or quarter after quarter. With the RocketDocs refresh functionality, your recurring DDQs can quickly be updated, minimizing duplicative work, reducing response times, and exceeding client expectations.



### 06 STANDARD RFI TEMPLATES

Through RocketDocs you can build Standard RFI or Product Overview templates that are refreshable and easy to access. These sales tools provide detailed information designed to proactively inform prospects about your firm, products, and operational capabilities. In some specialized cases, a Standard RFI can even take the place of a formal RFP, thus saving time jumping through the hoops of a formal bid proposal.



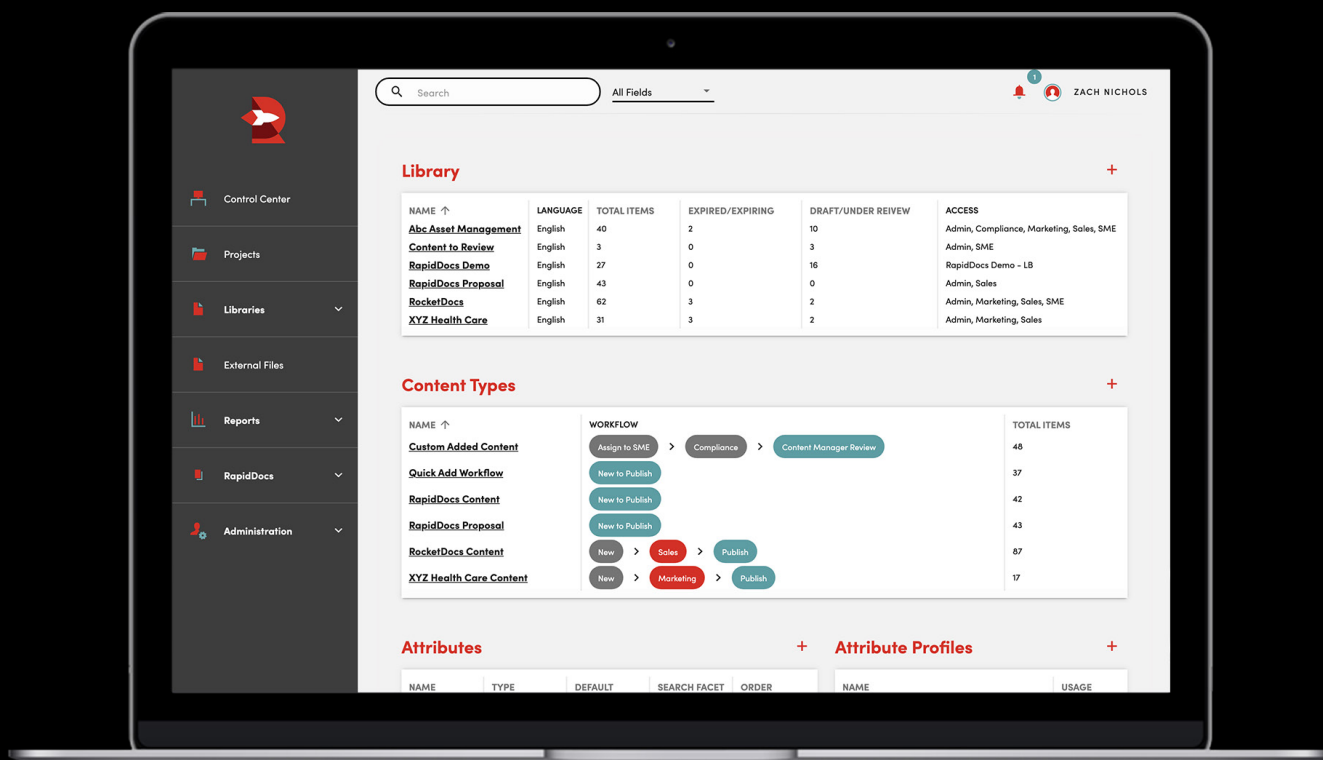
## 07 SECURITY QUESTIONNAIRES

Security questionnaires are becoming more and more thorough and abundant...especially in the due diligence stage prior to onboarding new clients. These intensive and highly technical Excel questionnaires are often labor intensive and cumbersome to complete, requiring the involvement of multiple contributors. RocketDocs can streamline this process by allowing technology staff direct access to their knowledge base, facilitating quick and easy response insertion within Excel using the RocketDocs LaunchPad™, and establishing sequential workflows to make sure all contributors have signed off on the final product.



## 08 MULTIPLE LIBRARIES

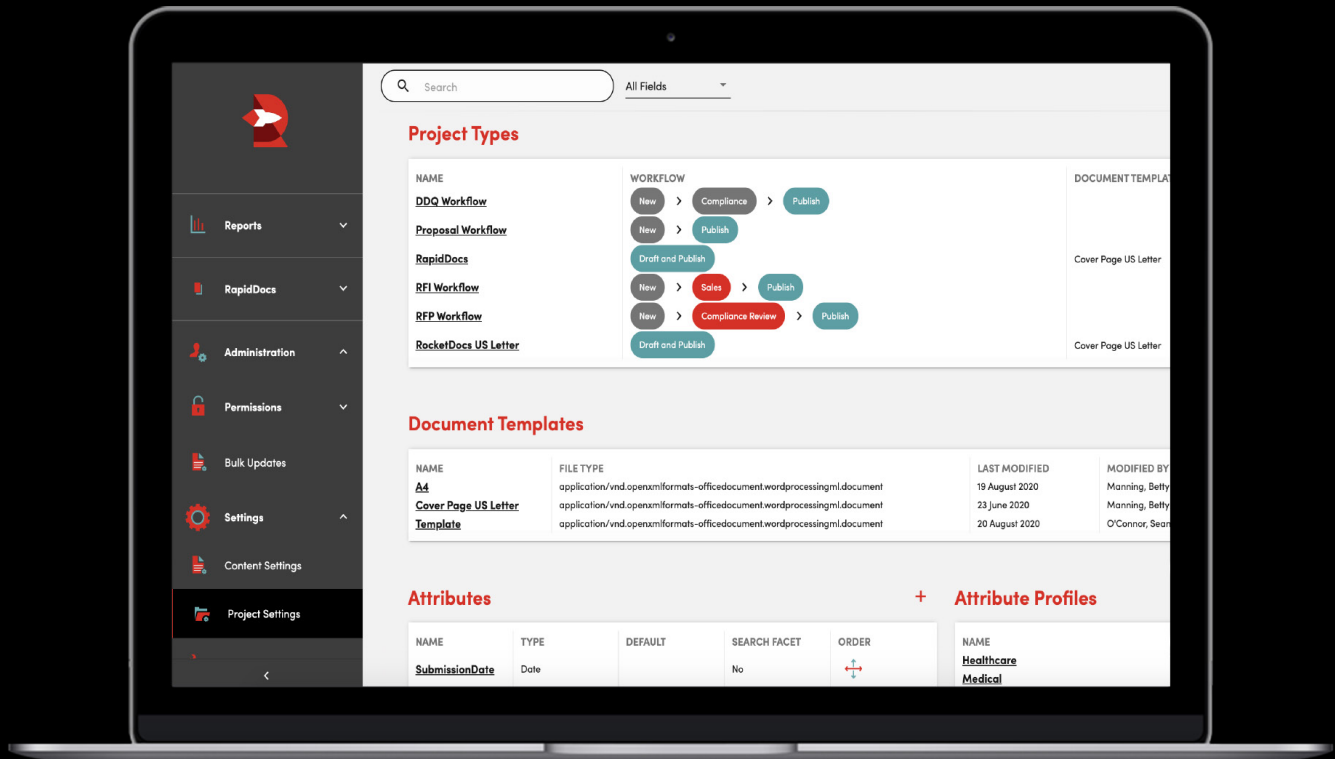
RocketDocs library's infrastructure can be segmented in numerous ways to align with your business. Through the use of multiple libraries, you can divide up content by region, division, strategy, line of business, country, and many more options. Your administrator can easily set user-based permissions, limiting users to only the libraries that apply to their products or areas of coverage.





## 09 PROJECTS

As your single source of truth, projects in RocketDocs allows you to compile all project-associated documentation, correspondence, attachments, etc., in one place, allowing easy access to the pertinent project details and files — now and in the future. This is not only useful when managing concurrent live projects, but it can also be handy if you need to access past materials that have been sent to a client or prospect.

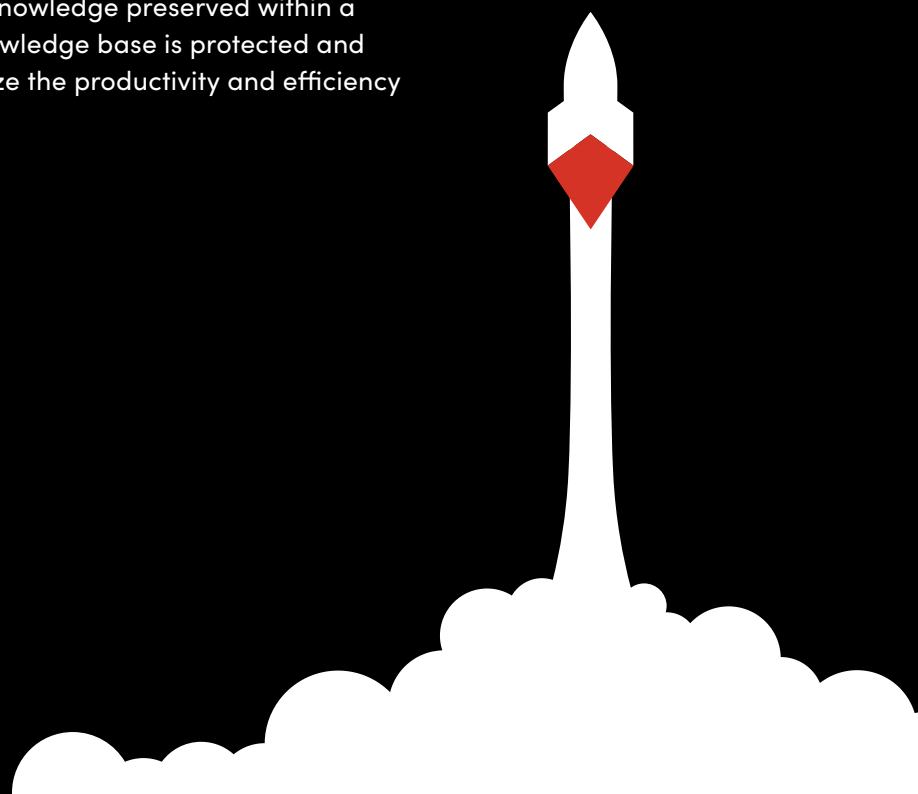


## 10 API INTEGRATION

RocketDocs can help you set up seamless integrations with other systems. Our CSMs can strategize with you to optimize your workflows and take full advantage of your software investments. Our flexible API allows us to custom build integrations in cost-effective ways.

**We've constructed RocketDocs 2.0 with your sales team in mind. We know, no two customers are alike, and having a flexible and customizable solution with a broad array of features will help you scale to the evolving needs of your users — quickly, easily, and intuitively.**

Plus, having your essential institutional knowledge preserved within a centralized system assures that your knowledge base is protected and will continuously be available to maximize the productivity and efficiency of your sales and marketing staff.



**We've highlighted just a few of the functions within the RocketDocs one-stop solution — but there is so much more that we can do to help you land bigger, better, faster wins.**

**Schedule a demo today!**