

5 Things to Love About RocketDocs

By: Tonya Myers



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Tonya Myers, new Customer Success Manager and former RocketDocs customer, shares her five favorite things about RocketDocs 2.0.

Having been a ResponseFull user for more than seven years, I love the fresh, modern design of RocketDocs 2.0. At its core, RocketDocs is focused on helping you build a robust content library and giving you the tools to ensure that content is accurate and compliant at all times. Ultimately, the goal is to expand the tool kit that leverages this extensive wealth of knowledge in new and innovate ways. To that point, here are some cool things that you can do today with your RocketDocs 2.0 response management platform!

- 1 One of my favorite features in the new RocketDocs 2.0 platforms is the ability to expand the universe of users who can access the platform. Your content database contains a wealth of information that you've worked hard to accumulate and maintain, so why not share all that company knowledge with others?. Through a variety of license types and flexible permissions, you can grant varying levels of library visibility and accessibility. Not only will this foster company-wide collaboration with your various proposal contributors, but it also allows quick, self-serve access to the knowledge base for your sales, or compliance teams, for example. Not only does this help minimize ad-hoc library lookup requests, but it also means others can locate the information they need when they need it.
- 2 Similarly, my next favorite feature is the use of multiple libraries. Your content library can be segmented by region, strategy, line of business, etc. This could serve multiple purposes. For example, you may have multiple proposal teams with their own unique databases. Or you may have writers in various locations who only need access to content for their region. The less obvious advantage to a multi-library structure is that you can offer the use of the platform to other business units. Here are some groups that may benefit from a content library of their own in RocketDocs:

- Compliance and Legal
- Human Resources
- Communications
- Technology
- Security

You could also set up libraries based on content themes: biographies, organizational charts, thought leadership, disclosures, etc. All libraries are permission-based, and permissions are easy to manage.

3 My third favorite feature in RocketDocs 2.0 is RapidDocs™, our sales enablement tool. This tool offers unlimited possibilities for building dynamic templates that leverage your content library and branded templates. Pick your template, fill in a few customization fields, answer a few questions, and you've assembled relevant content into a fully branded document within seconds. While this tool was designed for auto-generating on-the-fly materials such as company overviews, statements of work, order forms, fee proposals, and so on, it has unlimited potential to be repurposed in countless ways. Every time we show RapidDocs, someone comes up with an innovative new way to utilize it for a unique purpose. Here are just a few ideas of what you could assemble using RapidDocs:

- Biographies and/or Organizational Charts
- Internal and/or External FAQs
- Standard RFIs
- Benefits Overviews
- Insurance Plan Reviews
- Template Builder

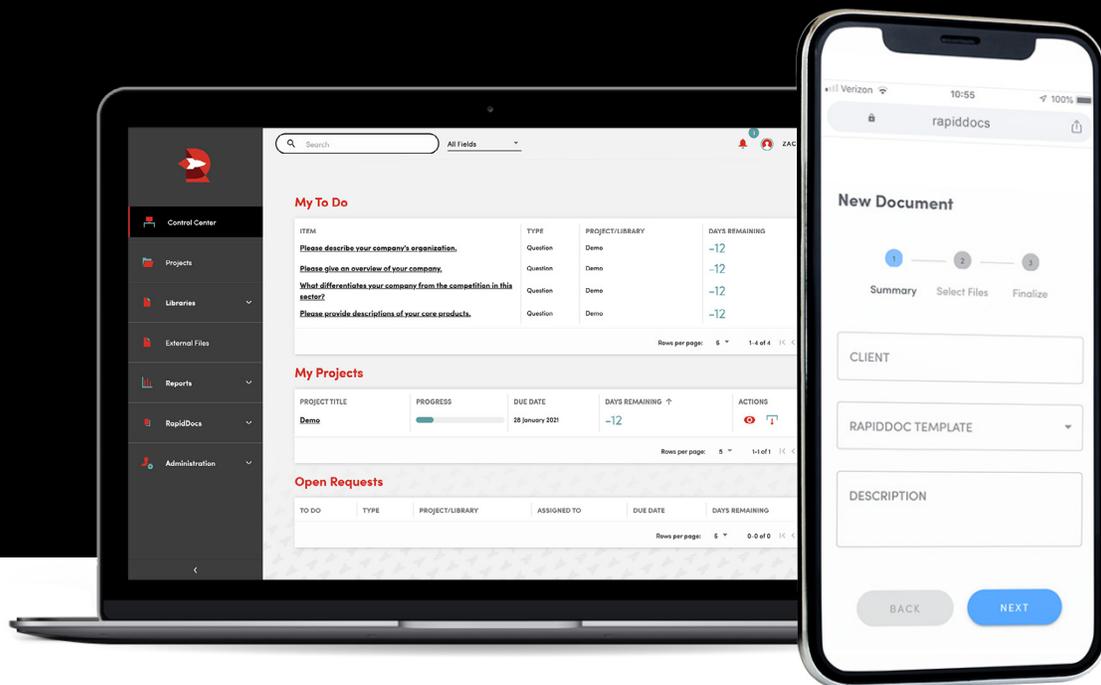
4 Number four on my list is such a major time saver! You know those recurring client questionnaires that you get every year, or every quarter? Some of them can be quite extensive, but generally they're the same questions every time. Using the RocketDocs refresh functionality, one click of a button can refresh the questionnaire with the latest and greatest answers... so you don't have to start from scratch every time! Your recurring questionnaires can quickly be updated, minimizing duplicative work, reducing response times, and exceeding client expectations.

In addition, RocketDocs helps you track these recurring questionnaires so you can anticipate what's coming and plan resources accordingly.

5 Last, but not least...the final feature I'd like to highlight is customizable workflows. Workflows ensure that the correct people view, contribute, and approve content and projects. An unlimited number of workflows can be created, conforming to your existing processes for different document and content types. In other words, workflows can be as simple as a one-step process to create and approve, or a multi-step sequential process such as 1) draft, 2) advisor review, 3) compliance review, and 4) final approval. Workflows are simple to set up and easy to use. Plus, with workflow automation, each step is tracked within the system, so the project lead doesn't have to micro-manage each step of the review cycle.

We're excited for you to join us on the RocketDocs 2.0 platform and to continue to innovate new ideas and functionalities with you!

We've been providing Sales Enablement Solutions since 1994. So we know what it takes to build long-lasting, valuable, efficient solutions. And with every new demand and obstacle, we've innovated ourselves and our solutions to match the needs of our customers. RocketDocs is the only integrated Sales Enablement platform focused on your success by moving at the speed of sales with the power of productivity. So you can land bigger, better, faster wins.



Tonya Myers | Customer Success Manager

Tonya joined RocketDocs in 2020 as a Customer Success Manager. Prior to joining RocketDocs, Tonya spent more than 11 years in the asset management industry and was a user of the RocketDocs platform for more than seven years. Tonya was a Vice President, Investor Relations at Brookfield Asset Management where she supported the firm's global sales and RFP efforts through library administration, content management and development, proposal execution, standard RFI automation, and various other strategic initiatives. Prior to Brookfield, she was the RFP Team Manager at Mesirow Financial. Tonya received a Bachelor of Music in Education from Millikin University in Decatur, Illinois.