



Customer Success Story

How WellRight Responds to Million Dollar Deals With Loopio

Success Snapshot

- 53% of RFP responses automated
- 2-3x faster response rates (average 5.5 hours per RFP)
- 150+ RFPs submitted every year
- Scaled to support bidding on million-dollar contracts

About WellRight

WellRight has helped hundreds of organizations boost employee engagement with its personalized, flexible, and purposeful corporate wellness programs and platform.





“There’s nothing more painful than having your sales team dig through endless files for answers. These inefficiencies can cost you a lot of money. I knew we had an opportunity to streamline our RFP processes to make our sales team more successful.”

Stephanie Benavidez
Senior Director of Sales Enablement | WellRight

Challenge

Set WellRight’s Sales Team up for Success

WellRight is the new kid on the block when it comes to corporate wellness. But the company is gaining traction rapidly and now serves more than 600 customers.

When Stephanie Benavidez joined WellRight in 2018, she knew that their existing systems and processes wouldn’t keep pace with the company’s rapid growth.

Manual RFP tasks slowed the sales team down and took time away from high-value activities, such as prospecting and lead nurturing.

Team members could only respond to 5-7 questions per hour, as they needed to search a massive Word document for answers. Sales reps often had to email subject matter experts for information before each RFP deadline and proposals lacked consistency.

Solution

Game-Changing Automation with Loopio

Stephanie's top priority was finding an RFP platform that would grow with WellRight. She looked into several tools but thought that their technology was hard to use and wouldn't scale easily.

When Stephanie found Loopio, she knew it was a game-changer. Both Stephanie and Becky Meskill, WellRight's proposal writer, love Loopio because of:

- **Auto-filled answers.** Loopio's auto-fill tool, Magic, saves hours on each RFP by providing answer suggestions for frequently asked questions.
- **Easy collaboration.** Loopio stores all of WellRight's RFP content in a central location so that sales reps can find information and collaborate with ease.
- **Custom templates get RFPs out of the door quickly.** No more time-consuming formatting or developing new content for every proposal.
- **Networking opportunities.** Stephanie and Becky joined Loopio's Slack community where they can meet others in their field and share best practices.
- **Loopio takes their feedback seriously.** Becky and Stephanie's suggestions for new features have been incorporated into Loopio's product planning.



"Everyone on our sales team praises how Loopio makes their lives much easier."

Becky Meskill
Proposal Writer | WellRight



"Loopio is one of the most important tools in our tech stack. I feel like we have a true partnership and that Loopio will continue to grow with us over time."

Stephanie Benavidez
Senior Director of Sales Enablement | WellRight

Results

Automate 53% of Responses and Submit Million-Dollar Bids

Since implementing Loopio in 2018, Stephanie and Becky have achieved the following results:

- **Improved consistency opened the door to million-dollar contracts.** Just a few years ago, WellRight targeted companies with less than one thousand employees. Since Loopio helps reps create consistent RFPs at scale, they are now responding to more complex RFPs for million-dollar contracts.
- **Automated responses.** Throughout 2020, WellRight automated 53% of their RFP responses using Loopio's Library search and the Magic auto-fill tool.
- **Submitting RFPs 2-3x faster.** Now, an RFP that used to take two or three weeks, takes just one week from start to finish. Turnaround time is cut in half and it takes the sales team an average of just 5.5. hours to answer the RFP questions.
- **Rapid adoption of a new process.** WellRight's sales team had never used anything like Loopio before, so there were concerns about adoption. But with Stephanie and Becky's training, Loopio is met with open arms and zero resistance. Reps now save countless hours and have more time for high-value sales activities, such as prospecting.

Learn Why 800+ Companies Love Loopio

Loopio's response software makes responding to RFPs, DDQs and security questionnaires, easier and faster.

See for yourself.

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