

Word® Based Document Automation Solution a “Market Disrupter”

Current Situation

In the investment industry, quality and efficient responses to requests for information are essential to maintaining a competitive advantage.

After difficulties in attempting to house the core content within an Excel document and referring to old RFPs and questionnaires for responses, Keeley turned to using a commercial web-based Cloud solution.

According to Brent O’Neil, Sr. Client Services Associate, “The Cloud-based system was inefficient and labor-intensive. It required a great learning curve and the use of cumbersome back-end systems. It took a dedicated resource to maintain the quality and consistency of the content within the system which imposed a burden on a firm with a limited number of people resources. We had to find a way to decrease our turnaround times and use our resources more efficiently.”

Solution: Improve Quality and Efficiency with Expedience Software Solutions

Expedience Software has tackled the primary challenges of document automation: time to delivery and quality of response all within the simple familiar interface of Word®. In the first year after implementing Expedience solutions, Keeley has cut turnaround response time between 25–50%. Not only has the turnaround time decreased, but the quality has also improved. O’Neil attributes the simplicity of the Word® based solution for their ability to clearly articulate the value proposition with a unified consistent message throughout the entire organization. “We are impressed with this Word® based product that is overall a simple, efficient tool used to create a library of qualitative information available for the firm to access and deploy at any time. Simply open Word® and find and insert the answer. A recent compliance cycle was completed easily. The batch detail was printed out in 5 minutes for review by the compliance manager. Edits were indicated and the changes were made within the Word® portal. **The Expedience solution is simple, very fluid and fun to use.**”

O’Neil concluded, “The Expedience solution is recognized by our firm as a market disrupter in the RFP/RFI automation industry offering products and services that leapfrog current technology and provide simple solutions to complex or long-standing technical or practical problems.”

About Expedience Software

Expedience Software creates fast, accurate, and beautiful proposals directly from Microsoft Word! Automate RFP & RFI responses (even Excel RFPs!), FAQs, DDQs, SOWs, Questionnaires, PowerPoint presentations, and more! With more than 20 years of proposal automation experience, Expedience is the premier solution for sales and proposal professionals in financial and asset management, healthcare, legal, manufacturing, and technology organizations.



KEELEY
Teton Advisors

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Brent O’Neil, Sr. Client Services Associate
Keeley Teton Advisors

Company

Keeley Teton Advisors

Industry

Asset Management Firm

Project Lead

Brent O’Neil, Sr. Client Services Associate

Critical Issue

Creating a simple, effective and efficient RFP, questionnaire and compliance review process for the firm.

About Keeley Teton

Keeley Teton Advisors, LLC is an independent investment boutique with a distinctive, time-tested approach to value investing. Headquartered in Chicago, the firm’s a 20 years ago by John L. Keeley, Jr., a pioneer in small cap investing.

With approximately \$2.5 billion in assets under management, Keeley Teton offers a variety of value investment strategies to meet the needs of our clients. In addition to serving the institutional community, we manage the Keeley Funds, a family of publicly traded mutual funds.