

**“I love this product. It reminds me of the old Pragmatech products that were so popular. By far easier to use than the big cloud-based products.”**

## Current Situation

In the Healthcare industry, to maintain a competitive edge, it is important to have customer-ready content available to RFP teams, Sales Teams, IT, Subject Experts and Clinical Services in order to create articulate and consistent responses to business questions and opportunities.

Teladoc also uses a cloud-based system to house their mission-critical content but found it to be over-complicated and therefore under-utilized.

## Solution: Improve content consistency and user adoption through Expedience Content Portfolio Galleries.

Teladoc implemented the Expedience Microsoft Word-based Content Portfolio and an automated Frequently Asked Questions (FAQ) document for the Account Managers and Sales Team.

According to Barbara Esm Medina, RFP Manager, “My experience has been that outside of the RFP Team, it is very difficult to get anyone to use a database tool of any kind. Expedience is so easy and very intuitive, and because the content actually resides in Microsoft Word where our teams are already working, they use it.”

“I like that you can have multiple smaller collections of content in manageable mini-databases” continued Esm Medina. “That makes it much easier to share the content with other departments who get questions from clients.

More people outside of the RFP department use it because it requires little to no training. They are actually finding it fun to use.”

Esm Medina concluded, “As an original RFP Machine user, I really missed RFP Machine and this has many of the features I missed in that software (Word integration, blueprints, and more). I use it to automatically generate our FAQ documents the way I used to do with Pragmatech’s Proposal Assembler. Much easier to keep updated than our cloud-based backend database system. I can think of so many uses for this beyond RFPs.”

**“I especially like the automation features that let you make blueprints to automatically generate updates for documents like FAQs and admin manuals.”**

## 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.



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**“ The RFP team handles a lot of internal requests for information. I would like to give the SMEs for each department their own portfolio. I hope to eventually roll it out to several departments that we will supply with custom portfolios of just the content that they use ”**

Barbara Esm Medina, RFP Manager  
Teladoc Inc.

### Company

Teladoc Inc.

### Industry

Healthcare

### Project Lead

Barbara Esm Medina, RFP Manager

### Critical Issue

The initiative’s goals were to:

- Increase the consistency of information throughout the sales process
- Provide users a system that is easy to use
- Provide Account Managers a competitive advantage by arming them with sales-ready content

### About Teladoc

Teladoc is the first and largest telehealth provider in the nation, founded in 2002. Teladoc’s U.S. board-certified doctors can resolve many medical issues, 24/7/365, via phone or online video consults.