

Laundry Equipment Provider Enjoys ‘Cleaner’ Proposals

The Challenge

Serving the laundry-equipment needs of universities and colleges with a commitment toward customer service defines the mission of Virginia-based Caldwell & Gregory, now in its 30th year in business serving clients in 25 states and Washington, D.C.

To serve the higher education market, the marketing and sales team were challenged to respond to requests issued by universities in the busy bid season beginning each spring.

Relying on desktop publishing software that only a few marketing team members could use, Caldwell & Gregory’s sales team manually reviewed drafts, leaving little time to customize or catch copywriting errors in the rush to meet submission deadlines. The team also found keeping track of customer references time consuming, given the frequent turnover of administrative staff.

The Solution

Expedience delivered a time-saving automated proposal solution based on Microsoft® Word, freeing up time for both marketing and sales contributors to enhance the quality of the final submission.

“Expedience put the proposal into the hands of the sales team, which we love because they know what they want and know what they want their package to look like,” says Patrice Braxton, project coordinator in Marketing & Sales. “It’s made a world of difference to the previous way we did things.”

One of the most significant benefits has been Excel integration of reference lists. Consolidating the list into a single master Excel file allowed Expedience to integrate it into the template. Now the team can quickly sort references by RFP requirements and instantly insert them into the response. “It’s really been a lifesaver – it’s there, it’s formatted, and it’s always updated,” says Braxton.

“With Expedience’s solution and training, we’ve taken ownership of our proposals and confidently update our Portfolio, templates, and Style Palette. It’s brought amazing continuity to our proposals. We’ve dialed down the errors, and the sales team loves the way our proposals look.”

-- Patrice Braxton, Project Coordinator – Marketing & Sales



Company

Caldwell & Gregory

Industry

Commercial Laundry & Equipment

Critical Issues

- Reliance on desktop software few could use
- Inconsistent reference lists
- Sales unable to ‘own’ proposal creation
- No time to customize, fully proof proposals on deadline

Solutions

- Content Library
- Automated Proposals
- Styles Management
- Custom Excel Integration

Impact

The Expedience solution has enhanced the quality of Caldwell & Gregory’s proposals, reducing errors, freeing up marketing time, and empowering sales team members to own RFP responses as never before.

Expedience also integrated the company’s Excel-based reference list. Based on the success of this time-saving application, Expedience is adding additional Excel integration.

During the conversion from the desktop software to Word, graphics team members were concerned they would lose formatting options, but those fears were shortlived. “We really love what we’ve been able to do with our package in Word, and we continue to learn new things the more we work with it,” says Braxton.

The ability to house all the content together using the Expedience content library and then auto-filling school names and other placeholders has enhanced accuracy and efficiency.

Freeing-up marketing resources has enabled the marketing team to work on other projects, including updating their website with newly branded content already created during the Expedience implementation.



Responsive Customer Support & Training

Expedience’s implementation included user and author training sessions, which were recorded so Caldwell & Gregory’s team could refresh their training as needed. Braxton says she especially appreciated Diane Loudenback, VP of Client Services. “She was always willing to pick up the phone anytime we needed anything and willing to work with our schedule. Diane’s been a delight to work with.”

Expanding Excel Integration

Looking forward, Braxton says the team is now looking to expand on Expedience’s Excel integration capabilities to bring in highly formatted and customized tables and graphs. “We are creating a master Excel sheet with all the charts, and they’ll be integrated to pop right into the proposal. It’s going to be wonderful.”



Expedience Software

Expedience Software, founded by pioneers in proposal automation, operates where proposal professionals already work – in Microsoft® Word. Its solutions drive better proposal quality while accelerating the speed and effectiveness of proposal teams around the world. Expedience serves hundreds of companies in the financial and asset management, healthcare, legal, manufacturing, and technology industries.

The company’s rapidly growing footprint extends to customers throughout the U.S., Canada, UK, Germany, the Netherlands, Australia, and New Zealand. Named one of the 20 Most Promising Sales Tech Solution Providers for 2019 by CIOReview and 50 Innovative Companies to Watch by Silicon Review, Expedience continues to lead the industry with its innovative expansion of the Microsoft Office suite. Learn more at www.expediencesoftware.com.



Caldwell & Gregory

Headquartered in Richmond, VA, Caldwell & Gregory is the nation’s leading provider of value-based laundry service programs. Founded in 1990 as an alternative to the national apartment-focused laundry companies, Caldwell & Gregory’s mission is to provide colleges and universities with exceptional laundry programs, maximizing student satisfaction and value. Our philosophy is to exceed the expectations of our clients, believing our success will follow. We choose to invest in aspects guaranteeing an exceptional experience and providing the greatest value. By maintaining this mission, Caldwell & Gregory has become **the most trusted name in the industry**.

Connect with Us!



Website: www.expediencesoftware.com

Tel: (978) 378-5330

sales@expediencesoftware.com

Follow Us On

