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How Loopio Helps Allied Universal Respond to RFPs and Questionnaires Up to 90% Faster

Success Snapshot

Up to 90% faster turnaround on Q&A-based responses

50% faster turnaround times on RFPs

119% increase in quarterly content reviews

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[Allied Universal](#) is a global leader in security solutions, protecting and serving businesses across industries, including 400 of the Fortune 500. Their offerings range from security guards and advanced security technology to security at high-profile events like the Super Bowl and Coachella. Allied Universal's proposal management team plays a vital role in driving new business as well as retaining existing business in a competitive, highly dynamic industry. They deliver accurate, customized proposals that build client trust and generate over $1 billion in new business annually.

Challenge

Siloed Data Increased Risks of Inaccuracies and Inefficiencies Across Thousands of Proposals

Kerry Colvett has had quite the varied career. She started as a teacher, then owned and operated two construction businesses before moving into sales at a security company. Colvett found sales to be a lot like teaching: they both involve educating people and helping them make decisions. It was such a great fit that she began training salespeople, eventually becoming Vice President of Sales Enablement for North America at Allied Universal.

As a leading security provider, Allied Universal completes thousands of RFPs each year. Trust is paramount in their industry, so every proposal has to be nearly flawless and contain the most up-to-date content. The stakes are even higher when proposals become promises.

"We do a lot of government work. In a lot of cases, our proposal becomes a part of the contractual terms and gets attached to the service agreement. So we have to make sure anything in that proposal is accurate and that it's the most current information."

The team was detail-oriented, but their process for gathering the material didn't do them any favors. It used to be a major headache, and it only got worse as the business expanded.

"Things change very rapidly in our industry, especially with acquisitions and evolving regulations," Colvett says. "We had to ensure our content was always fresh and accurate, but we were managing everything manually, which was a huge task."

The company's manual RFP process was a tangle of inefficiencies. With proposal managers spread across different locations and business units, variations of the same content sat in siloed systems. Teams had to manually locate the latest information, often spending hours wading through old proposals, searching email threads, or trying to get answers from different departments.

"At the pace we were operating, there wasn't always time to chase people down, so we had to trust other departments to add their own content," Colvett says. "Often, people would just copy and paste, leaving old customer names or using content that was five or six years old."

Because of that, Colvett and her team spent hours double-checking people's work and scrambling to make sure content was correct. This effort left them little time to create tailored responses that would differentiate them from competitors.

Allied Universal wanted to work smarter, not harder, to support their booming business.

"We're in the security world. People want to be able to trust us, so it's really important that we provide content and material they can trust and know is accurate."

Kerry Colvett
Vice President of Sales Enablement for North America at Allied Universal

> "When working across multiple business units, a consistent process is key. We've built one that keeps content fresh and lets us focus on crafting standout responses."

Kerry Colvett
Vice President of Sales Enablement for North America at Allied Universal

A Centralized Content Library Provides Peace of Mind

Allied Universal assembled a cross-functional team with members from legal, sales, and proposal management to find a solution that would automate the RFP process. After evaluating and testing 13 different systems, the team came to the consensus that Loopio was the best solution to overhaul their proposal process.

Loopio had a user-friendly interface that shorted the learning curve and encouraged people to begin using it quickly. It was also easy to add new material to the library, which fostered organic content growth and mirrored how the Allied Universal teams worked on proposals. With its robust functionality and support, Loopio offered everything they needed to streamline RFPs across business units, ensuring they were completed consistently, accurately, and efficiently every time.

The team began to realize a number of benefits, including:

- **A source of information that everyone can trust.**

  Subject matter experts verify and approve RFP content within a centralized library, which gives teams confidence they're always using the most accurate and compelling data.

  "Loopio serves as our one source of truth," Colvett says. "It houses all of our content that we need for proposals and for RFPs so that we can keep it up to date, available, and easy to search and find."

  They take advantage of tools such as Loopio's automated review cycles, which provide automatic notifications to subject matter experts when it's time to review or update content. The team also relies on the merge variables feature to update key details in one place and have those changes automatically updated across the entire library.

- **Smooth onboarding and effortless user adoption.**

The Loopio implementation was seamless. Colvett held small group training sessions, supplied test documents for practice, and hosted monthly stand-up calls to answer questions and share tips. Those efforts, combined with Loopio's ease of use, led to swift onboarding and widespread adoption across hundreds of users.

"Loopio's interface is really easy to use, so it's not so overwhelming to people when they first start using it," Colvett says. "They get really comfortable quickly and can search to find content that they need."

- **Scalability across multiple business units.**

Loopio makes scaling content management easy. With the platform's flexible library structure, Allied Universal can categorize content by business unit, product, or region, ensuring the right teams can access the right information. Colvett has found the best way to enhance the platform's scalability is by making maintenance a collaborative effort.

"Just this week, somebody sent me a document and said, 'These answers need to be in Loopio,'" she explains. "We've built a process where everybody knows to send the content to Loopio so that we can review it and keep it there."

Because it's so simple to add and update content, the fast-growing library becomes more curated over time and can scale to match Allied Universal's growth.

- **Trusted AI for efficient content creation and editing.**

Recently, Allied Universal has begun leveraging more of Loopio's built-in AI functionality, a welcome addition to the team's toolkit. "My team just loves it," Colvett says. They use AI within Loopio to help them write and edit answers, condensing or expanding on content as needed to tailor the material to each proposal.

"We like it so much because we know that it is just using our content library—not going out and finding info that is wrong or doesn't apply," Colvett says. "That has really helped get people excited all over again about using Loopio."

Securing the Future With 50% Faster Proposals and $1 Billion in Annual Sales

Loopio has become the heartbeat of Allied Universal's proposal process, and its impact extends across the organization. Allied Universal's centralized library in Loopio has become the go-to source for teams throughout the company, saving significant time and effort for a wide range of users.

"When people just need to answer a question, or they find something to put into a document—maybe not even a proposal—everybody knows that Loopio is this one great source of valid, verified, and updated content," Colvett says.

Since adopting Loopio, they've experienced:

- **50%+ faster turnaround on complex proposals.** Allied Universal completes thousands of proposals each year. Now, the team completes even the most cumbersome RFPs 50% faster—and more straightforward Q&A-based requests have a 90% faster turnaround time. Aside from speed, the team knows their responses are accurate every time.

- **Over $1 billion in annual sales.** Using Loopio, the proposal team helped to deliver $1 billion in annual new business sales. "In some way or form, my team touched that $1 billion in sales—either by providing the content or doing the proposals," says Colvett. "The proposals we create with Loopio are a really important part of growing our business."

- **119% more content reviews.** Using Loopio's automated review cycles, Allied Universal has increased its quarterly content reviews by 119%, reflecting a marked improvement in content quality control.

Allied Universal's partnership with Loopio has become crucial to their success. It's all about building a team that works together, and Loopio facilitates collaboration within individual teams, throughout Allied Universal, and externally with potential partners. By increasing accuracy and consistency, teams spend less time worrying about outdated content and more time confidently creating winning submissions that secure the best projects for their business.

"If we had to go back to the old school way of searching old proposals and emailing people to chase them down, it would really slow our ability to develop strong, compliant, and compelling proposals. It would have a very adverse impact on our ability to bring in new business and to keep the business that we have," Colvett says.

"I love the team at Loopio. They're responsive, they're always innovating, always coming up with new tools, and they really listen to our feedback. I really believe that Loopio is the best partner I've ever had the chance to work with."

Kerry Colvett
Vice President of Sales Enablement for North America at Allied Universal

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Response management software that makes responding to RFPs, DDQs, and security questionnaires faster and easier.

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