



Virtual Proposal Center Implementation: Using SharePoint to Manage Proposals

SOS Healthcare Staffing (SOSHCS) is an established medical staffing resource for professionals seeking employment and for healthcare organizations seeking top-quality professional support. For more than 30 years, SOSHCS has been helping healthcare organizations and home health clients fill their nursing and allied health staffing needs.

As part of its business development goals, SOSHCS wanted to implement a SharePoint-based solution to centralize its opportunity identification and qualification and proposal development and management activities. SOSHCS wanted to streamline and improve its opportunity identification, qualification, and proposal pursuit process. The current method was often “hit-or-miss” or rushed, which led SOSHCS to make a lot of arbitrary, unplanned, and costly decisions.



USE CASES

Project Planning, Site Mapping, Site Structure, Creative Concepting, Site Mockups, Identity Access Management



TECHNOLOGIES

Microsoft Office (Word, PowerPoint) , Office 365 SharePoint



Challenges motivate change

Persistent challenges are often what motivate us to change. For SOSHCS, those recurring challenges included:

- Not being able to tame content dispersed in multiple locations; making it time-consuming for the team to find what they needed
- Not having a dedicated person to manage proposals; someone who could develop, update, and maintain the required content
- Not having a centralized area to maintain proposal artifacts; duplication of effort was a regular occurrence

It was clear what SOSHCS needed. Contentiful recommended a SharePoint-based virtual proposal center (VPC) to provide the SOSHCS team with flexibility and scalability and offer immediate and improved accessibility to proposal-related content.

Centralizing proposal activities

The SOSHCS VPC was easy to design, develop, and implement. Using the out-of-the-box features of SharePoint 2013, Contentiful launched the “bones” of critical resource center quickly, in three days!

With the established VPC, SOSHCS had a common work area allowing onsite and remote proposal teams to collaborate effectively—with around-the-clock access to relevant tools and information needed to plan, assemble, create, review, and distribute proposals and other BD-related activities.



SOSHCS team site: landing page

Office 365 Sites

BROWSE PAGE

SOSHCS Team Site EDIT LINKS


Search this site

SOSHCS Team Site

ACTION ZONES

- Opportunity Pipeline
- Content Library
- Resource Center
- Proposal Center
- Recycle Bin

EDIT LINKS



WELCOME

The SOSHCS Team Site was designed to help SOSHCS team members focus on government-related business development, procurement sources and activities, and proposal development and management efforts. To improve accessibility and management of these items and activities, SOSHCS has implemented this SharePoint solution to:

1. Optimize and streamline processes.
2. Facilitate effective management and maintenance of accurate, relevant, and up-to-date content.

Team Calendar

October 2015

SUNDAY	MONDAY	TUESDAY	WEDNESDAY	THURSDAY	FRIDAY	SATURDAY
27	28	29	30	1	2	3

Announcements

+ new announcement or edit this list

✓ Title
SOSHCS makes the leap to SharePoint

Active Tasks List

Due Date	Task Name
	Create comprehensive list of SOSHCS contracts and projects
	Review training manual requirements
	Create list of current and desired procurement sites

+ Add new item

Points of Contact

+ new item or edit this list

✓ Full Name	Business Phone	Email Address
Donna Creason	(970) 682-4771	dcreason@soshcs.com
Ruth Hollins	(720) 535-1236	Ruth@soshcs.com



SOSHCS team site: action zones

The screenshot shows a SharePoint site for the SOSHCS Team. The top navigation bar includes 'Office 365' and 'Sites', along with user information for Donna Creason. The main content area is titled 'ActionZones' and features a sidebar with a list of 'ACTION ZONES': Opportunity Pipeline, Content Library, Resource Center, Proposal Center, and Recycle Bin. The main content is organized into four columns, each with a placeholder image and a heading: 'OPPORTUNITY PIPELINE', 'RESOURCE CENTER', 'CONTENT LIBRARY', and 'PROPOSAL CENTER'. Each column contains a descriptive paragraph about the respective zone.

OPPORTUNITY PIPELINE
A pipeline is a way of classifying opportunities through the various "sales" stages until they are awarded. The **Opportunity Pipeline** is a custom list used to manage and track solicitations coming into the SOSHCS team that may or may not be pursued. By using the information in the opportunity pipeline SOSHCS can create performance metrics, identify areas of improvement, and pinpoint weak spots for future pursuits.

RESOURCE CENTER
The **Resource Center** contains various resources that may be helpful during the proposal process or for using the SOSHCS Team Site. This resource center has many different ways for team members to get acclimated to the SOSHCS proposal development environment and to learn more about the company. It doesn't matter if you are new to or experienced with proposals, you'll find the information you need to get started, right here.

CONTENT LIBRARY
The purpose of the **Content Library** is to capture and manage boilerplate content, artwork, and templates that can be repurposed for proposal documents. Well-planned content library development and maintenance results in reduced proposal production time, which allows for more time to be spent on building success strategies reducing other business costs. Maintaining a content library benefits the entire team by 1) minimized marketing overhead and 2) improving overall proposal development efficiency.

PROPOSAL CENTER
The **Proposal Center** is an active, collaborative area that allows for geographically dispersed proposal team members to have a common work center with access to the tools and information needed to create successful proposals. Operating within this areas of the site allows for: 1) more control over the proposal process, 2) expanded accessibility to prior proposal information, 3) reduced administrative efforts, 4) improved proposal review process, and 5) keeping proposal development on schedule.

Let's connect  

