

PleaseReview saves WIN / RATIO 100s of hours on large proposals in manual work and recovery time

WIN / RATIO specialises in writing and designing proposals for public-private partnership pursuits (P3s). Based in Vancouver, the team works with construction firms across North America and Europe. They offer their clients a clear value proposition: 'Excellence in proposals through people, process and technology'. Principal and Proposal Manager Sarah Isaacs explains how PleaseReview helps them to deliver those core values to their customers.

The challenges of document review

Before using PleaseReview, Sarah identified two issues that needed to be solved: the heavy workload of consolidating feedback and the risk of inaccuracy if comments were missed:

"We used to create a PDF, email it around, everyone put in their changes, emailed it back, then someone consolidated it back into the live document. That process was very labour intensive.

"For example, we had one big project in 2014 that involved 100 contributors and 15 companies. We had to put someone in full-time just to collate people's comments and resolve them back into the document. The real problem was that people felt that their comments had been missed."

The criteria for choosing a new document collaboration and review system:

WIN / RATIO needed a web-based platform that could meet these business needs:

- Support a typical review team size of over 20 people, from three or more companies
- Allow anytime access for contributors in North America and Europe
- Give clients secure access to review content and give feedback
- Centralise the process of collecting and resolving comments
- Redact commercially sensitive information from the documents

How PleaseReview brings value to WIN / RATIO

Since WIN / RATIO started to use PleaseReview in 2019, they have been delighted with the improved outcomes:

"PleaseReview saves us at least 100 hours on large proposals in manual work and recovery time. But it's not just the time-saving that's important for us.

"Now we use Word in PleaseReview for the interim review so people can make changes right in the document and there's no possibility of losing comments. It's a much smoother process because everything happens in one version of the document.

"PleaseReview is enormously efficient for us in terms of effort and duration because it enables us to use automation and self-service."

This delivers on one of the core elements of their value proposition to clients: 'We deploy software to improve collaboration and increase efficiency during the writing and review processes.'

KEY FEATURES:

- Multiple user communities can be provided with secure access to the review
- Complete control over who can take actions within a document in terms of what, when and where
- Review management is supported with automated alerts and tracking for deadlines and other events

Protecting client confidentiality

The text redaction tool in PleaseReview gives WIN / RATIO's clients much more control over their confidential information:

"When clients need to redact information that is confidential or represents a trade secret, WIN / RATIO has used the text redaction tool. This automates what could otherwise be a labour-intensive and error-prone process and provides full transparency and control over what has been redacted.

“PleaseReview allows clients to make those redactions in a self-service way, so there’s no possibility that we would make an error in translating what they wanted to be redacted.”

KEY FEATURES:

- Allows users to redact sensitive information from PDFs without the need for integration with Adobe tools

Ease of adopting PleaseReview

With people rapidly becoming more digitally aware, Sarah found it easy to get colleagues and clients on board with PleaseReview:

“People are more tech savvy now and they’re comfortable using something that’s web-based rather than downloading documents or working on paper. We never have any issues, and we work with people of all ages and different cultural groups.”

KEY FEATURES:

- Users simply log in to their account online – no installation or downloads necessary
- The simple ‘point and click environment’ means minimal training is needed
- Advanced user training materials can be accessed within PleaseReview



WIN / RATIO and Sarah Isaacs

WIN / RATIO provides proposal-writing services and expertise to construction firms bidding for P3s in North America and Europe. Sarah Isaacs has 18 years of experience in proposal writing, editing and management, with a near 100% success rate for qualification submissions. Sarah has managed 23 P3 submissions for 14 teams, representing project values over \$25bn.

To find out more, contact Ideagen today, info@ideagen.com