

DOCUMENT MANAGEMENT TEAM

COMPANY: **Hewlett Packard Enterprise**

SECTOR: **IT**

① Requirements

- * Necessity for producing high-quality materials on time for a large bid in which HPE took part in.
- * The documents had to be completed for a short period of time in compliance with both HPE standards and specific customer requirements as well.

③ Outcome

- * Completing the project in strict pre-defined timeframes.

② Solution

- * Formatting the documents in accordance with HPE standards and requirements.
- * Proofreading and editing to make the documents precise and consistent.
- * Establishing successful communication with HPE point of contact for the deal and ensuring a smooth workflow.

- * Quick adapting to the customer's requirements.
- * Professionally branded materials.

Document Management Service

The Document Management (DM) Service was launched in 2016. Soitron's first customer was Hewlett Packard Enterprise Company (HPE). The DM team works closely with the HPE's Solutioning and Sales Support teams and is also available for other teams in need of professional management of all types of documents. The DM team experts deal with a large number of confidential documents paying meticulous attention to details and following standard or tailored requirements. The DM team formats and edits files in Word, Excel or PowerPoint managing their polished feel and look that is always compliant with all brand and customer criteria. The DM team demonstrates extensive knowledge in MS Office saving efforts and time in your everyday work.

Project Summary

HPE was invited to take part in a bid for a technical solution for a global firm specialized in agricultural products and environmental protection. After receiving and analyzing the Request for Proposal specific requirements a batch of different legal and technical documents and files were created to support HPE business offer, including Statements of Work, Proposals, Technical Solutions, Pricing documents, CVs, Appendices, etc.

All the information had to correspond to HPE's corporate identity and branding as well as its tone and voice. Furthermore, it had to be aligned with some end-customer prerequisites.

During the whole documents creation phase, the constant updates in the files required version control, simultaneous work with several contributors (co-authoring in SharePoint) on the documents and taking care of important details like graph recreation and replacement, transferring of content, proofreading and editing making sure consistency is applied within all documents, as far as formatting, abbreviation, tone and voice are concerned.



Solutions

In one week, more than 50 Word, Excel and PDF documents were processed which makes over 800 pages in total. The whole DM team became very well acquainted with the requirements and standards of both the end customer and HPE as the team had to split the work between themselves and deliver a polished consistent final documents version.

They managed to communicate all amendments needed to be done clearly and in time, with the responsible Point of Contact (PoC) from HPE side. Updates were tracked, reviewed and formatted in due time.

The project was complex and required also some additional activities to be performed – collection of supplementary documents, creation of templates, fixing of broken styles, anonymization of confidential and revealing data, adjustment of print settings, conversion of files from one format into another, etc. The leading DM of this request was the one to coordinate matters with a graphic designer and then all working DMs had to carefully replace existing old graphs with their recreated copies in a PowerPoint file checking the whole batch of documents as part of the final polishing of the files.

Results

The files were transformed into professionally branded business documents successfully conveying the corporate style and identity of HPE bearing the relevant expertise that HPE provided to its customers throughout the years.

With excess professionalism, precision and attention to detail, the DM team managed to complete the request for this specific project within the agreed timeframes that sometimes changed unexpectedly due to the turbulent and unforeseen circumstances of the pursuit.

The personal and at the same time customer-driven approach enabled proper prioritizing of the tasks and dealing successfully with a couple of last-minute issues.

Before the submission date the HPE PoC was replaced but the leading DM quickly established effective communication and closed successfully this stage of the deal. HPE was down selected for the final round of the bid and HPE pursuit team was extremely satisfied with the performed work on the deal and expressed

their gratitude for the professionalism and involvement of the DM team stating that they will request the DM team support again very soon for the second stage of the deal.

“ Hello team,

I just want to thank you for your efforts and hard work. As always, there was a lot of work in the final hours. No matter how much I plan, this always seems the case!

You really were a superb support and very professional in all you did and produced.

A big thank you from me, for that support.

Let's hope we have enough “points” to be downselected and move to the next phase.

If that is the case, then I will certainly be requesting you as part of the team. ”

Anonymised Pursuit Manager