

Capture Management

Case Study



RELI Group

RELI Group Brings New Maturity, Visibility, and Intelligence to Capture Processes with Help from TechnoMile



2013
Founded



Catonsville, Maryland
Headquarters



550+
Company Size



**Information Technology
& Services**
Industry

Since 2013, RELI Group (RELI) has provided innovative technological and security solutions that serve and improve the lives of American citizens. RELI is a management consulting firm that supports federal, state, and local programs in the health, safety, and security sectors. RELI has successfully supported prime contracts at federal agencies including Centers for Medicare & Medicaid Services (CMS), Centers for Disease Control & Prevention (CDC), and the Transportation Security Administration (TSA). The company employs more than 550 experts across 39 states, Washington, D.C., and Puerto Rico, including more than 120 employees in HUBZone areas.

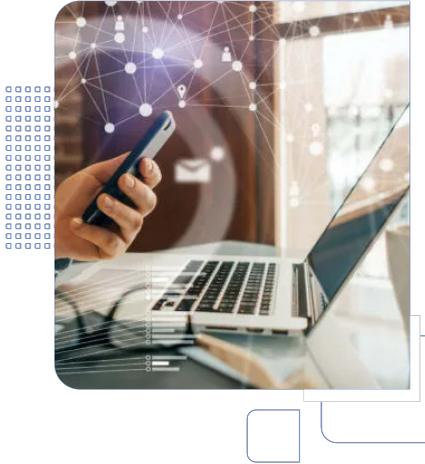
Like many fast-growing GovCon companies, RELI found itself outgrowing its pipeline management tools and processes. Nathan Crochunis, VP of Operations at RELI Group, explains, "The company was using a combination of Costpoint, multiple spreadsheets, and manual processes to manage our sales cycle. We tracked opportunity data, managed our pipeline, and recorded essential information during the capture stage in Excel workbooks. This led to unreliable pipeline data, poor knowledge management, and difficulty effectively disseminating opportunity data to various stakeholders. We recognized RELI needed a more dynamic pipeline and capture management solution that would allow us to consolidate and automate our manual processes and make it easy for all stakeholders – across BD/Capture, Finance, Contracts, and our leadership team – to have visibility into opportunities."

Maturing & Improving Business Processes

In early 2022, RELI launched a search for a CRM solution that could support the company on its rapid growth trajectory. Says Crochunis, "At the heart of our goals for implementing a CRM was our desire to mature and improve our business processes. We wanted to enable stronger governance and discipline around what's going into the pipeline, reduce manual processes where possible, enable our employees to work more collaboratively across business sectors and teams, and have everything opportunity-related – our pipeline, customer relationships, win themes and customer pain points, partners, Pwin analysis, and Price-to-Win – in one, consolidated tool."



Designed for GovCon Out of the Box



The RELI team conducted an internal analysis of critical business practices they wanted to migrate into a CRM tool, allowing them to clearly identify their requirements for a CRM solution. RELI then evaluated several CRMs, assessing each one's ability to meet their criteria through out-of-the-box features versus customizations, as well as comparing the total cost of each CRM solution relative to how well it satisfied their requirements.

Ultimately, RELI selected TechnoMile's Growth Suite, a CRM solution that's purpose-built for selling to the federal government. It's deployed into a company's Salesforce or Microsoft Dynamics environment, layering on unique features and capabilities required by government contractors. Says Crochunis, "TechnoMile met nearly all our requirements with Growth's out-of-the-box features. It stood apart as the only CRM we demoed that was specifically geared to GovCon needs – for example, it had a standard integration to pull in opportunities from GovWin IQ. Since it's a Salesforce-based solution, it would give us the flexibility to easily tailor data fields and other aspects of the platform to align to RELI's specific process needs or naming conventions. And, we could integrate Growth with Costpoint to automate project setup in our ERP."

A Single Source of Truth

Now, with its TechnoMile Growth solution in place, RELI's Excel-based Capture Workbook is a thing of the past and the company is reaping the rewards of having a collaborative platform for pipeline and opportunity management. "TechnoMile's Growth Suite is our single source of truth for opportunity details, tracking partners, capturing contractual agreements like NDAs and TAs, documenting phone calls or meetings – it's all consolidated in one place. And the benefit has been improved visibility and collaboration across the company," shares Crochunis. "We also appreciate Growth's reporting capabilities. We can pull customized reports to fit very specific business needs – whether that's high-level pipeline reporting, tailored financial reports, or reports that track details like RFIs or market research responses we've responded to for opportunities. Growth makes it easy to meet the reporting needs of a variety of internal stakeholders."

Improved Visibility & Collaboration

Since implementing Growth, RELI has maintained a strong focus on enablement of its Growth user community. Leena Rhodes, a Market Research Analyst at RELI Group, is one of the company's power users and serves as the Growth system admin. She hosts weekly sessions to provide ongoing enablement and help continue driving adoption. Says Rhodes, "Our users are really loving the data visibility - the ease of seeing their whole sector's opportunities aggregated in one place, plus the ability to see what other sectors have in their pipelines. It's helping us collaborate more across opportunities. Users also like the convenience of the GovWin IQ Connector, which lets them see their opportunity updates right within Growth." The ability to tailor Growth to the company's unique needs is another win cited by Rhodes. "I've been impressed with how much customization we can do on our own. We've changed around fields and mapped them to match different capture artifacts we had. It's all very intuitive and TechnoMile's Support team has been very helpful in enabling me to do this type of customization."



Unexpected Intelligence

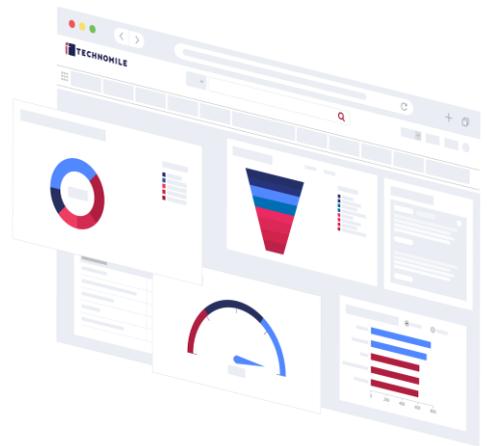
For RELI, an unexpected benefit of the TechnoMile Growth solution has been their team's ability to leverage Competitive Insights, which is the federal market and contact intelligence platform that's embedded within Growth. Says Crochunis, "RELI is to a point in our growth and maturity where focus is at the account level, so we have agency account planning that's being done by various account leaders. The way the data's consolidated in Competitive Insights, the graphical dashboards, plus having contact details for people at agencies - if you're doing agency-specific analysis, it's a lot of very accessible data all in one place. So, it's a great resource to help ensure we're staying smart with our current or potential clients." The RELI team is also using the tool to inform their competitive analysis. "Competitive Insights gives you great information about who's in the space, what they're doing, and how much they're winning, so you get a good view of who you're going up against."

A Focus on Continuous Improvement

RELI has an internal working group focused on making ongoing improvements to the company's sales processes and identifying how Growth can support these efforts. "In the last year or so we've solidified our processes around how we pursue business and our leadership is quite pleased with the progress we've made, but we're taking a continuous improvement approach," shares Crochunis. "If there are capabilities in Growth that will help us make our processes better, we're going to consider using them. For example, we're looking at what we're doing within our gate review Board process today, asking where do we need to take it, and then how does the TechnoMile platform's automation overlay that? So, it's about identifying what we need to be doing going forward and then doing it within Growth – we'll keep peeling back the onion and implementing in increments. I think that will be our plan for some time – there's so much more for us to explore in Growth!"

About TechnoMile

From go-to-market to contract closeout, TechnoMile provides transformative cloud solutions that empower companies to find, pursue, win, and retain more business with the government. With our best-in-class cloud platform, companies optimize BD and capture processes, gain unique competitive insights, source contact intelligence, automate and de-risk the contract lifecycle, and gain an information advantage that elevates enterprise performance.



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