Capture Management

Case Study

Xcelerate Solutions Gains Visibility and Fast Tracks Growth with Help from TechnoMile's Growth Suite

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Since 2009, Xcelerate Solutions' mission has been to help make America safer and more secure. Headquartered in McLean, Virginia, Xcelerate provides Enterprise Security, Strategic Consulting, and Digital Transformation services to federal agencies responsible for national security and law enforcement. The company's solutions optimize efficiency and effectiveness and enhance the security and resilience of America's personnel, physical, and cyber infrastructure. Xcelerate provides differentiated expertise across the personnel vetting and security, suitability, credentialing lifecycle.

Like many growing GovCon companies, Xcelerate found itself faced with the challenges of effectively managing its opportunity pipeline. Leo Patino, VP of Capture and Proposal Management at Xcelerate Solutions, said, "We couldn't quickly and easily report on pipeline or visualize the data. We recognized that if we wanted to continue to scale our business – to be a $50- or $100 million-dollar company – we needed a more robust solution."

2009
Founded

McLean, Virginia
Headquarters

300+
Company Size

Management Consulting and IT Services
Industry

TECHNOMILE

"The fact that TechnoMile's solution was created, tailored, and customized for the federal market is what attracted us. We were confident that the combination of TechnoMile and Salesforce would give us a platform with the depth and breadth of capabilities we needed to fully manage our pipeline and to support the growth aspirations for our business."

Leo Patino, VP Capture & Proposal Management at Xcelerate Solutions

Improved Pipeline Management

In 2017, Xcelerate launched a search for a pipeline and capture management solution. The company's goal was to find a platform that would improve the overall management of Xcelerate's pipeline of opportunities by enabling increased visibility, transparency, and accountability. However, the tool had to be well-suited to manage the multiple stages of the government opportunity lifecycle without adding a significant burden on the limited sales resources. Says Patino, "We were looking for the right tool to help us get our arms around near-term and long-range opportunities and to help us better organize the efforts of our sales and capture teams."
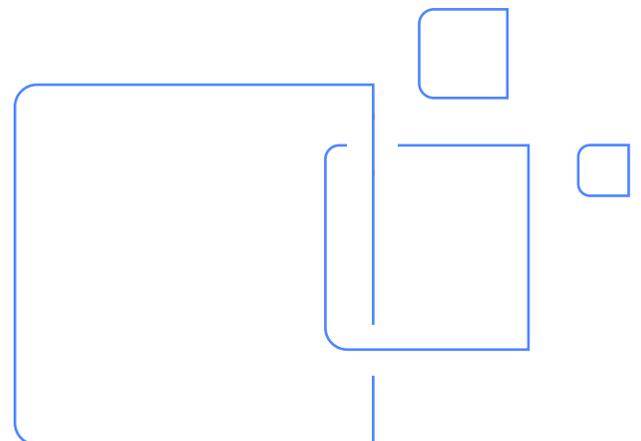
Tailored for the Federal Market

After evaluating several CRM solutions, Xcelerate selected TechnoMile's Growth Suite, which is designed specifically to address the complexities of 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. "The fact that TechnoMile's solution was created, tailored, and customized for the federal market is what attracted us. We were confident that the combination of TechnoMile and Salesforce would give us a platform with the depth and breadth of capabilities we needed to fully manage our pipeline and to support the growth aspirations for our business," says Patino.

Aligning to How Business Gets Done

Xcelerate partnered closely with TechnoMile to get its Growth Suite up and running. "Overall, the implementation process was smooth – all of the data we needed was transitioned over and the training was very helpful with getting the team up to speed on how to use the tool," shares Patino. But there were several lessons learned that he'd share with others taking on this type of initiative. "Change management is critical when implementing CRM technology, so be prepared to do additional training not only to reinforce how to use the tool, but also the benefits of using the tool." Patino also stresses the importance of including technical and business representatives in your implementation project. "You need both sides talking very closely. It's critical to have the business's perspective of the BD lifecycle and processes and what information is important to capture. That's how you'll achieve a solution with workflows and fields that are aligned with the way you talk about and do business."

Gaining Pipeline Clarity

Today, with its TechnoMile Growth solution in place, Xcelerate enjoys clear visibility into its pipeline and its individual users appreciate the ability to easily tailor the tool's reporting and dashboards to reflect what's most important to each of them. Says Patino, "We now have clear pipeline metrics to share as we report to leadership and to our Board. We can see exactly what stage work is in and how it's divided – what are the things we're going after, categorized by our service areas and portfolios. The tool has also enabled us to identify the key elements that we need to focus on for each opportunity. It has helped us strike the right balance between 'bluebirds' or opportunities where we take a swing because it fits within our core capabilities or customer set, and opportunities where we are running true capture campaigns, from which we have seen tremendous success."

Standardized, Efficient Workflows

Beyond the value of the TechnoMile Growth solution's reporting and analytics, Xcelerate has also benefitted from improved process standardization and efficiency. "Being able to understand which stage each opportunity is in using the Shipley-based workflow is helpful, as is the opportunity scorecard. The scorecard allows us to track what's been done for each opportunity – do we have enough information and due diligence completed to qualify it and continue to move it down the pipeline? Additionally, it has given us the ability to easily customize the templates to meet business and reporting needs. We also appreciate the automation of gate review decks. This saves our team a lot of hours when putting together presentations for our gate reviews," shares Patino.

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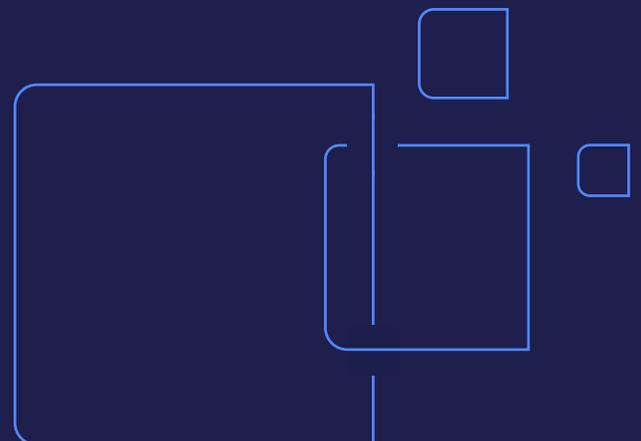
Stronger Accountability & Collaboration

Xcelerate's TechnoMile solution has also strengthened accountability and collaboration across the company's sales and capture teams. "You buy this type of tool to create rigor around opportunity management. But I don't think we realized what a forcing function it would be. It's really instituted a high level of discipline and accountability across our team," says Patino. "And collaboration is what you want, but seeing that come to fruition where people use the platform and have visibility into what others are working on and say, 'Hey, I know someone at that agency or office' or 'I worked on that opportunity in a previous life' – that's been a really nice benefit of the tool."

Helping Fast Track Growth

Xcelerate is currently on a growth fast track. In September 2021, the company had roughly 150 employees. Now, only eight months later, its employee base has grown to nearly 350 with plans to hire more. TechnoMile's solution has helped to support the company's exciting advancement. Explains Patino, "If we're sitting in a pipeline or portfolio review and the information isn't updated, that's easy to see. So the TechnoMile Growth solution has been a forcing factor for visibility and accountability that, over the years, has helped us to focus our account strategies and core capabilities. Now the right people are on the bus and in the right seats using the tool and we are seeing a lot of collaboration."

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Investing in the Future

Xcelerate recognizes that as it continues its rapid growth trajectory, it will need additional tools and technologies that make its employees' day-to-day lives easier and help to ensure strong compliance and recordkeeping. As a result, the company is evaluating the expansion of its TechnoMile solution to include Agreement Management and Contract Lifecycle Management. Shares Patino, "The more business we acquire, the larger our sales team will become, and the more NDAs and teaming agreements we'll be creating – so having insight into the status of agreements will be key. And then on the contracts side, the ability to bring more automation and rigor – from a compliance standpoint – will do wonders for us as we grow. We have an outstanding relationship with TechnoMile and we're looking forward to continuing our partnership."

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.
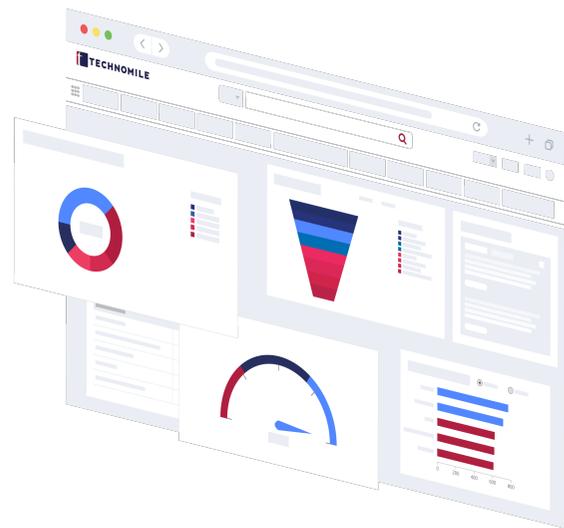
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to schedule a demo**

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