



Achieve Bid & Capture Excellence: Salesforce 360

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Introduction

The nature of doing business with governments is rapidly evolving as agencies develop and execute on their digital transformation strategies. We live in a world where everything is changing quickly. The pace and acceleration of change is being felt now, more than ever. As a result, it is imperative to adjust and adapt in order to succeed.

Government contractors experience these demands from both their internal teams as well as externally from their customers. Customers expect partners who are well versed in navigating this change and can show the results of their own digital transformation.

Furthermore, they expect government contractors to act as partners, anticipating and suggesting opportunities for them, helping them define and achieve their mission goals rather than just acting as technology or service providers. They want transparency and a frictionless experience.

Professional services organizations need to pivot to better compete and differentiate in this new reality. They need to know their customers, anticipate their needs, and be prepared to move quickly when opportunity arises. This requires complete data access across the enterprise, visibility into where process bottlenecks or risks might be occurring, and a framework to take action and make instant improvements. In this rapidly changing and challenging environment, you must find the routes, tools, and technologies to deliver, market, and thrive.

But change is hard. Especially as companies attempt to evolve across large, international, and diverse business units. Various processes, compliance constraints, technologies, and structures stand in the way of an organization's goal to provide a unified and streamlined experience for employees, customers, and partners.

“For us to serve our clients better into the future and meet their expectations, we needed to bring our network together,”

Reggie Walker

– Partner, Global Salesforce Alliance Leader, PwC US

“As a company, you need to get to the future first, ahead of your customers, and be ready to greet them when they arrive”

Marc Benioff

– CEO Salesforce

The good news is that you are not alone. Many of the world's premier professional services firms, like Accenture and PwC have turned to a single enterprise solution to automate their government contract capture processes allowing them to win more business, streamline operations, and increase customer satisfaction. These solutions free data from legacy systems, drive cross-company collaboration, and connect companies to their customers in powerful new ways.

Bring Your Best, Every Day

Achieving success with aggressive growth milestones, especially in the complex government contracting market which is laden with competitors, is challenging. It requires being at the top of your game at all times. What do you focus on to meet your goals?

Most importantly, how do you ensure that the company is bringing its best, every day?

Through the experience and testimonials of current customers, as well as observations on the professional services industries as a whole, the most relevant themes we found are:

- The industry continues to focus on operational efficiency, but digital transformation is now happening at an accelerated rate
- Rates of digital transformation are reflected in the adoption of business development technology
- The voice of your customer is more important than ever
- Human vision and technology can come together as firms get back to growth

As such, the top priorities when it comes to business development, capture, and growth for government contractors are:

1. Customer intimacy as your differentiator
2. Driving business insights from the data
3. Automating the mundane

The following will outline how to enable capabilities to deliver on those priorities and how other leading organizations have seen the benefits.

Customer Intimacy As Your Differentiator

When you are in the business of selling trust, advice, support and insight, your client relationships are critical – ‘people buy people’ is very real. Customers are your pipeline and delivery mechanism, and relationships are in the spotlight. According to [Gartner's 2019 Gartner Customer Experience Management Survey](#), 75% of organizations are now able to show that customer satisfaction leads to revenue growth through increased customer retention or lifetime value. In the end, it boils down to growing relationships and winning deals.

Strengthening customer intimacy requires all operating divisions and business units to have access to essential customer information, operational and financial information, and analytical insights to run a business that aligns with the customer's mission. Everyone must have a common operating picture or risk having uninformed, or even worse, conflicting customer conversations. Even one such interaction will stand out and can erode the customer's confidence that you can deliver a unified and complete solution.

With a unified view, an even deeper focus on relationships can take place. Understanding who is meeting with the customer, what is being said, and who has both previous and current relationships that can be leveraged to influence and shape the deal.

The Salesforce solution for government system integrators centralizes information in a single location where BD/Capture teams and their leadership can have instant access to all of the critical details driving account relationships and capture related data. A single view of a customer allows for planning, collaboration and execution across the extended business development, contract management, and operations teams in one place. By having a complete view of the pipeline, customers can justify the need for investment in particular resources, capabilities, or markets in order to unlock revenue. This has been proven by professional services companies around the world such as Robert Half and Associates, CareerBuilder, and Korn Ferry who use Salesforce to foster and maintain deep relationships with their customers.

Capture managers and business development executives can have a personalized view with key metrics, critical dates and activities, and what's changed related to key pursuits. Surfacing the most important information maintains a focus on winning more business and driving opportunities through the capture process. Salesforce empowers teams to leverage data to run the business more efficiently, intelligently, and at any time with built in mobile access.

Customer Spotlight: PwC

In 2017, PwC proved the power of organizing around its customers and leveraging all the relationships across the company. Its U.S. sales pipeline grew 300% due to Salesforce adoption, and member firms saw a 25% increase in won opportunities during the first year of transformation. Combining an empathetic understanding of the customer's mission and challenges with the ability to organize the appropriately skilled team to help address them has been both transformative and worthwhile. (Read the full PwC [customer success story](#).)



Established a global strategy to become a digitally enabled organization better able to thrive in the digital revolution. This shared vision enabled PwC to harness its internal consulting experience and transform its sales and marketing operations to ultimately better serve its clients.

The Results:

A 151% increase in recorded opportunity value

Sales pipeline grew 300%

Win rate increase of 25%

80% of PwC's network revenue captured in Salesforce

90% adoption rate with one week of deployment

“We’ve only begun to unlock the power of the PwC network, and we could not have achieved this without Salesforce”

Christine Robertson

– Marketing and Sales leader, PwC Canada

Driving Business Insights From The Data

With customers at the center of the business and the entire enterprise contributing to the picture, what you do with the data is the next important factor. Companies of every size and industry are transforming how they do business in the digital age with customers and data at the heart of those transformations.

Government system integrators must be data-driven, and promote a data-driven culture. This means providing an easy, accessible way to see and understand their data. Doing so will surface deeper insights to make smarter decisions, drive intelligent, connected customer experiences and accelerate innovation.

Within Business Development and Capture, Salesforce enables all employees to analyze data in real time, serve up relevant information to all levels of management, and make more actionable, data-driven decisions as a result. For example, capture teams can quickly assess the big picture surrounding a pursuit, helping them to better understand things like ‘What did we bid for similar contracts and what was the outcome?’ or ‘How is a particular teaming partner performing?’ By asking questions of data, critical decisions can be made to gauge PWin, capture success, trends, past performance of the contract.

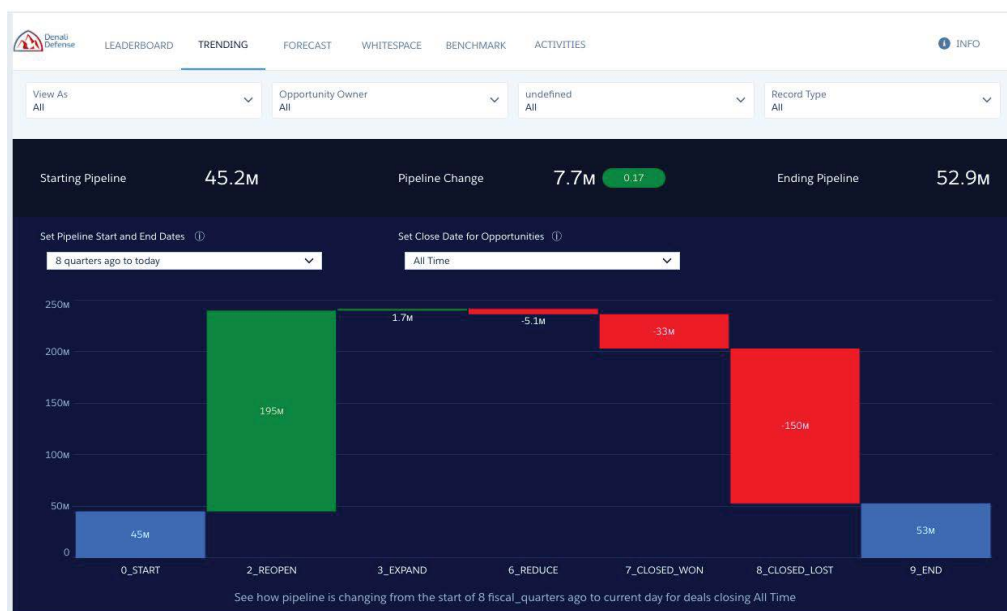


Figure 1: Pipeline Trending Report to explain the change in pipeline over a period of time

Not only can you create your own insights, but you should have insights automatically served to you. As a part of being an industry leader for the past 20 years, focused solely on Customer Relationship Management (CRM) and Sales, we offer pre-built templates for common challenges. An example of this is our Pipeline Trends dashboard (see Figure 1) which allows both individuals and leaders to see how their pipeline has changed over the week, month, quarter, or year. This eliminates the need for time consuming comparisons and number crunching in a spreadsheet and equipped with the ability to drill into the specific numbers to see the deals that make up each bucket, this template demonstrates immediate value delivered.

As you use Salesforce, the information gathered can be used to fuel powerful, predictive capabilities. Without having to generate any models or move any data, customers can apply Salesforce’s AI/ML capabilities to crunch the numbers. The result is an informed prediction of the likelihood of a certain outcome, the underlying factors that contribute to that outcome, and maybe most importantly, what you can do to improve the chances of the outcome.

Customer Spotlight: Accenture

Accenture is one of the many customers who has turned their data into a competitive differentiator. Shortly after deploying to 25,000 users in 5 months, they started to harness the power of all the data to generate insights and value. Asking questions like “What Happened?”, “Why Did It Happen?”, “Where Did It Happen?”, and “What Will Happen Next?”. In doing so, they moved from mere metrics to diagnosing trends, and ultimately predicting the likelihood of a specific outcome. KPIs are embedded on the specific Customer pages so they can see things like Win Rate for a particular customer. Additionally, insights and predictions sit alongside the records to guide, help make better decisions, and take action. In all, their win rate increased 20% when using these analytics during a pursuit. This is due in large part to their win probability prediction which is 97% accurate, so they can determine faster if the business is worth pursuing. Read the [full case study](#).

Automating The Mundane

Top-performing firms have long focused on delivering a comprehensive client experience, and having the right digital tools in place makes that all the more possible. The client journey doesn't end with the project report and presentation, but extends to the insights and feedback that cap off a project.

For firms that advise clients on business processes (versus legal or staffing firms), the need for digital transformation is all the more pressing. To stay competitive and credible, those firms need to position themselves as “walking the talk.”

Despite the adoption of technology described above, in our recent [State of Sales survey](#), 45% of customers in professional services say prioritizing leads and opportunities is primarily manual at their company. Even more (48%) say the same for determining what next best action to take on



Accenture automated their end-to-end sales process to improve efficiency. They enabled account teams to move from insights to actions more quickly with a rich array of metrics at the deal, account, and organizational levels, anywhere, and on any device. Salesforce analytics enabled them to develop indicators to help predict win probability and deal success.

The results:

- Accurately predicted win probability with 97% accuracy in less than three seconds
- Increased sales team engagement by 250%
- Increased win probability for deal pursuits that used analytics by 20 percentage points
- Standardized strategic approach and improved efficiency and effectiveness
- Enabled capture of online, real-time approvals

“What is most exciting about the deployment of Manage mySales is the industrialization and end-to-end enablement of our Accenture Selling Methodology. Now, by integrating our best practices into the application, they are more effectively adopted by teams and reinforced by leadership.”

Sara Porter

– Managing Director Sales & Pricing Performance,
Accenture

accounts. For both of these tasks, professional services is slightly more likely than other industries to automate, but that's still a significant number of people investing time in manual activities instead of building relationships with clients.

The survey also showed 60% of business development professionals say they spend too much time logging activities like emails and phone calls. Almost as many (58%) say the same thing about logging sales data and client notes, while 57% say they spend too much time generating quotes and proposals and gaining approvals.

Few firms want to see valuable employee time spent on activities that can be easily automated. Especially in professional services, time is money, and time spent on admin isn't as valuable as time spent delivering value directly to clients.

When you consider that many consulting firms maintain dozens of active conversations with prospects to reach a signed booking, firms need tools that make it as easy as possible for business development teams to manage those conversations. What's more, the business development function at these firms is not just the responsibility of a dedicated team, but more often than not undertaken by senior partners across the business. Their time can be better spent on work that drives billings.

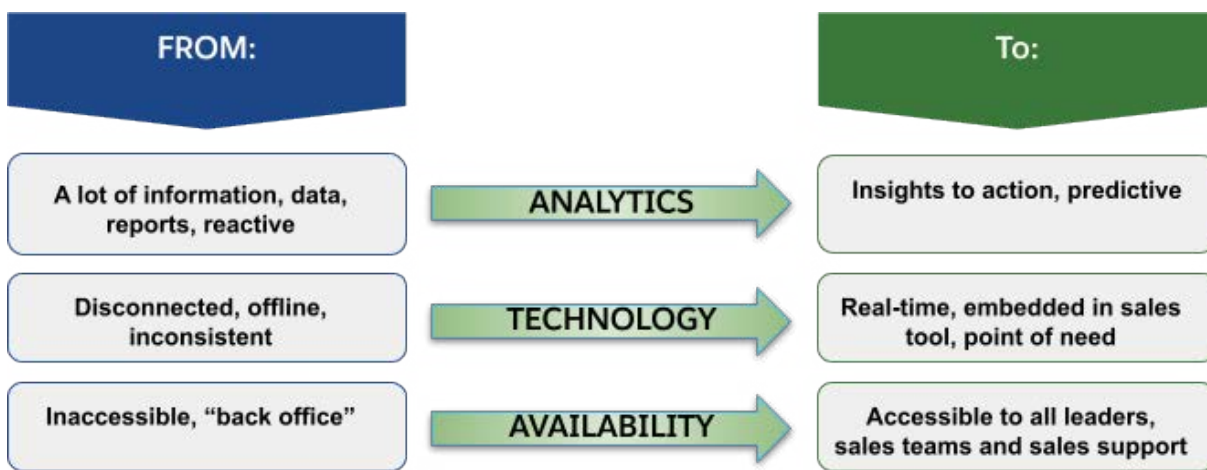


Figure 2: The journey to data driven insights

At the same time, firms don't need to jump in at the deep end of sales technology by automating everything at once. Rather, a staged approach starting with basics like opportunity management and email integration can provide internal wins that build momentum. Once teams see the value of automation, they're better placed to take the next step with more complex integrations.

With Salesforce, the possibilities for automation are endless. Customers are able to take our tools and apply them to the specific areas of focus. Government contractors commonly use our pre-built Outlook integration to bring the customer and deal context into the inbox and to make it frictionless to associate the emails to the proper record in Salesforce. Customers are also often looking to supplement their intelligence with industry data sources like GovWin, SAM.gov, or BGov. Having an automatic feed from these sources reduces manual entry and provides both valuable updates and timely reminders when the solicitation changes.

Gate reviews, approvals, and support requests are other specific areas where government contracting customers have streamlined. Whether it is populating the gate review template or actually running the briefing directly from the tool, significant time is saved. Similarly, the struggles of getting legal, risk, or creative support from across the organization can

be standardized. Visibility into upcoming and in-process requests keeps everyone aligned, allows for streamlined approvals, and is all done in the context of the customer or pursuit.

One of the biggest impacts our customers report is the reduction of data calls. Reports and dashboards can be shared for a common operating picture, but they can also be scheduled and sent to the relevant stakeholders at a specific time or once a specific threshold is reached. This also applies to teaming. Salesforce provides collaboration spaces for uploading documents, managing timelines, and visibility into key performance metrics in order to facilitate effective communication across the teaming partners.

Customer Spotlight: Alutiiq

Alutiiq's story exemplifies the impact that can be unlocked. After starting with their bid and capture processes and getting feedback from their users, they quickly implemented the small, but meaningful suggestions to make jobs easier and processes faster. As a testament to the value and usefulness of the solution, Alutiiq boasts a 100% adoption rate for their solution (see full [customer success story](#)). The speed and effectiveness of the solution also drew attention from other parts of the business who started to migrate their activities into the platform in order to achieve the same efficiencies.

By bringing data together from multiple systems, enabling automated status updates, standardizing and automating internal and external communications about proposal/award status, or unifying process and practices across all subsidiaries, Alutiiq is truly redefining their business and making the best use of their resources.



Alutiiq provides professional services and solutions to the Federal government and plays in an increasingly dynamic market as federal agencies are looking to become digital.

To streamline the contract process and shutter their antiquated systems, they deployed a bid and capture application on Salesforce's FedRAMP-authorized Government Cloud. It stores information about a contract in a single view, giving employees a clear way to track opportunities, develop winning proposals, and successful bids.

Results:

Simplification: Salesforce makes it easy for the right employee to access the right data at the right time. This empowers stakeholders to deliver the kind of timely and relevant communications that move a proposal forward, faster.

Capability Enhancement: A more collaborative environment, increased communication that helps Alutiiq bring in the best subject matter experts and collaborate as a team on all bids.

Differentiation: Integrated reports and dashboards enable Alutiiq to analyze data in real time, serve up relevant information to all levels of management, and make more actionable, data-driven decisions.

Insights: They now understand things like 'what was the true strength that helped us win the X contract that mirrors this opportunity, now?'

Summary

In this uncertain and quickly changing environment, there is no single path for all professional services firms to grow their client relationships and their revenue. While the COVID-19 pandemic shaped much of the conversation in 2020, the government contracting industry is optimistic about growth in 2021.

However, the stakes are high. Those firms that set up the right processes and technology will be best positioned to succeed in what comes next. Many government system integrators are looking to evolve and modernize systems and applications to better serve their core stakeholders – employees, partners, investors, and customers - while dealing with their clients' returning to their workplaces, a change of administration and new priorities.

Digital transformation starts and ends with the customer. To be successful in this digital world, you need to put the customer at the center of everything you do and consider how customers will engage with your firm down the road.

In this way, Salesforce is both a competitive differentiator and necessity. We help you through your digital transformation by providing the solutions needed to maximize your Government Capture and Business Development efforts. We can provide everything you need to connect with customers—from complete, up-to-date account information to actionable KPIs and metrics, all in one place and available anytime, anywhere. Everything you need to know is automatically pushed to you in real time, from contact information to opportunity updates and gate review approvals.

Organizations are investing trillions of dollars to become more data-driven, but only 8% successfully scale analytics to get value out of their data. Becoming data-driven requires embedding data into the identity of your organization and becomes a strategic asset. Using Salesforce, end-users are armed with the data they need to make better decisions. With our embedded analytics, insights come to you instead of you looking for insights. Don't just

“We recognized the need to invest in new technologies. We recognized how a robust technical solution could simplify mission-critical processes, advance our capabilities, and position the company as an innovator when bidding in the market,”

Allen Hines

– Chief Operating Officer, Strategic Operations,
Aluttiq

collect data, make better, faster and more trusted decisions based on the information you have. Increase your win probability while growing your business.

From premier professional services firms like PwC and Accenture, down to the laser focused government contractors like Aluttiq, Salesforce continues to be the partner of choice because of the power we deliver, our track record of innovation, and our proven results.

As these organizations demonstrated, transformation typically starts with business development and capture, but it does not end there. Each business continues to use Salesforce to change the way they do business across contracts, subcontractors, or other internal applications. In this way, Salesforce is the foundation that allows them to be at their best, every day, across their business.

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Immediate Next Steps

Salesforce looks forward to assisting you with next steps in your organization's journey to business development and capture excellence and beyond. Please contact your Salesforce account executive for more information.

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