General Dynamics Information Technology
Case Study: The Power of CRM

Executive Summary

General Dynamics IT found itself in a difficult position when it was discovered that its corporate-wide Business Opportunity Tracking System (BOTS), based on Microsoft Dynamics CRM 4.0, was about to fall out of support. With only twelve weeks to upgrade to Dynamics CRM 2015, they needed a partner who could quickly assess the requirements and successfully implement an improved user experience for their 700 users with the follow requirements.

- Implemented on-time and under budget
- Smooth and seamless transition to the new system
- Greatly enhanced user experience utilizing new business rules
- Powerful new BI features

Challenges

GDIT faced a variety of challenges that needed to be addressed with an upgrade plan.

1) <u>GDIT needed to implement the upgrade in an aggressive timeframe.</u>
The management team was facing two impending deadlines: (1) the old version of Dynamics CRM 4.0 was quickly approaching the end of its support cycle, and (2) the old network infrastructure it ran on was being decommissioned.

2) <u>Address custom Code Issues</u>
Existing Dynamics CRM 4.0 implementation used custom code that would not survive an upgrade. Existing functionality had to be re-implemented in the new Dynamics CRM 2015 and the mandate was to use as much out-of-the-box functionality as possible to make future upgrades more seamless.

3) <u>Existing user experience was lacking.</u>
The organization of data on the forms combined with the shortage of good business rules resulted in poor opportunity management. GDIT needed to make the user experience more fluid while also enforcing business logic to make the data more relevant.

4) <u>Provide a usable method for performing competitive analysis.</u>
GDIT needed the ability to quickly and accurately determine who their top competitors were and where the greatest risk was in their multi-billion dollar pipeline.

The Solution

To address the aggressive timeframe, the team proposed a methodology suitable for a quick but structured implementation. The project plan was based on Microsoft's proven Sure Step Methodology utilizing a hybrid waterfall-agile approach. Through constant communication and incremental development, we were able to pull both organizations together to collaborate on the solution.

To produce a solution that was easily maintainable, we decided to eliminate all of the existing custom code and replace it with the powerful new built-in functionality of Microsoft Dynamics CRM 2015.

The user experience was dramatically improved using a combination of approaches.
- The forms were completely redesigned to organize all the key data into one location.
- Related data was also moved to the main form so that the users had it readily available.
- Two new dialog wizards were written to guide the users through an complex processes
- A visual Business Process Flow was guide users through the process

Finally, in order to meet the need for competitive analysis, several new data structures and related dashboards were created to give management an instant visual view into their competition and risks. The dashboards include drill-down capabilities for detailed analysis of the competitive landscape.

Results & Future Plans

The client was skeptical that all the objectives could be achieved within the required timeframe. With a very intentional team approach with extensive collaboration throughout the process, the implementation and transition to the new system met all the key success criteria.

- Implemented on-time and under budget using a proven methodology
- Smooth and seamless transition to the new system for over 700 users
- Greatly enhanced user experience
- Powerful new BI features

The client has already begun discussions on the next phase:

- Outlook integration for better tracking of the business process activities throughout the opportunity cycle
- SharePoint integration Point for enhanced document management capabilities
- Power BI integration to take advantage of the platforms expanded capability to deliver more complex and sophisticated data analysis.

"ITK's CRM consultant blew my expectations out of the water."

– W. Mansell, Senior Marketing Analyst (General Dynamics IT)