

 Microsoft Dynamics

## Booz Allen Hamilton Case Study

Booz | Allen | Hamilton  
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## BOOZ ALLEN HAMILTON CONSULTS HITACHI SOLUTIONS AND MICROSOFT DYNAMICS CRM FOR AUTOMATED SOLICITATION MANAGEMENT AND DISTRIBUTION SOLUTION

**“The extendibility of the Microsoft Dynamics CRM platform allowed us to automate a very manual business process and increase productivity by over 100%. We are now looking at ways to leverage the platform’s capabilities across other functional groups within the organization.”**

**Abby Gunning, Senior Associate, Booz Allen Hamilton**

### Challenge

Each month, Booz Allen receives over 400 directed and undirected procurement solicitations and over 400 amendments to those solicitations under its GSA Schedules. Distributing the solicitations to the right business leaders and in a timely manner is critical, especially given the short timeframe, usually two weeks, to respond with a written proposal.

The legacy process to distribute the solicitations was manual, inefficient, and labor-intensive. Information about the solicitation was tracked in disparate systems by different functional groups and thus inconsistencies in the data were common.

Because of the time-consuming manual process, the team of solicitation analysts could only focus on distributing directed task order solicitations, which only account for approximately 35% of the total number of solicitations coming out under the GSA Schedules on which the firm could bid. This presented the potential for revenue



being left on the table because undirected solicitations were not proactively being routed to client staff for bidding consideration.

### **Solution**

In 2009, Booz Allen deployed and adopted the Microsoft Dynamics CRM solution for centralized pipeline tracking and reporting. The solution led to tremendous gains in efficiency and standardization so it was a natural choice to leverage the extensibility of the platform to automate the firm's solicitation tracking and distribution process.

Booz Allen worked with Hitachi Solutions, their Microsoft CRM Partner since 2010, to leverage the CRM capabilities of the platform, along with CRM accelerators and SharePoint to streamline the manual solicitation distribution process into an automated one. The web-based portal that was created allows employees to self-subscribe to receive solicitations based on specific criteria. Utilizing workflows and e-mail templates, employees are notified of a solicitation matching one or more of their subscription criteria. The solicitation documents and amendments are stored in a SharePoint document library and are accessible via a link in the e-mail.

### **Benefit**

The automated solution allows for real-time notification of solicitations and eliminates human error in distribution techniques. The firm is able to reap the benefits of focused discovery, analysis, broadened distribution, and tracking of solicitations by implementing a streamlined and scalable solution. It also provides a tremendous and agile ability to capture and aggregate data, identify and report trends, and focus messaging around opportunities for growth.



### WHY HITACHI SOLUTIONS?

Hitachi Solutions is one of the largest, most qualified and highly experienced Microsoft Dynamics consulting firms across the globe, capable of handling complex tier-one displacement projects. Our company's caliber of expertise and commitment to customers is evidenced through our consistent recognition from both Microsoft and industry analysts.

Contact a Hitachi Solutions expert to discuss how our Microsoft Dynamics Solutions can help improve your productivity.

[sales.dyn@hitachi-solutions.com](mailto:sales.dyn@hitachi-solutions.com)

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**Hitachi Solutions America, Ltd.**  
8105 Irvine Center Drive,  
Suite 300  
Irvine, California 92618  
T: +1 949.242.1300 | 888.254.7242  
[us.dynamics.hitachi-solutions.com](http://us.dynamics.hitachi-solutions.com)

**Hitachi Solutions Europe, Ltd.**  
10th Floor  
City Point Tower  
1 Ropemaker Street  
London EC2Y 9HT  
T: +44 (0) 203.640.6300

**Hitachi Solutions, Ltd. Dynamics  
Solution Sales Dept.**  
2-18-1, Konan,  
Minato-ku, Tokyo, 108-8250  
T: +81 3.6718.5756

*With the efficiencies gained from automating the process, analysts have increased bandwidth to distribute undirected solicitations and as a result, the firm has seen over an additional \$50M in potential revenue over the last two years.*

### Other tangible benefits include:

- 180% increase in the number of solicitations analyzed, tracked, and distributed across the firm
- 50% reduction in the amount of time to distribute an individual solicitation or an amendment
- 30% increase in the number of business development-focused staff subscribed to receive solicitations

