

Flexible, Agile Solutions to Deliver Business Functionality

Presenting GSA with a Hosted Customer Relationship Management Application Using Software as a Service

VALUE SUMMARY

- ✓ Agile development and streamlined delivery speeds business results
- ✓ Citizant's solution developers leverage best-of-breed technologies to lower development and operating costs
- ✓ The GSA will take away lessons learned for installing cloud solutions across the federal government

The Business Challenge

The General Services Administration needed a hosted customer relationship management (CRM) system for its global Federal Acquisition Service (FAS) group to manage the agency's complex interactions with its customers. FAS delivers comprehensive products and services across the federal government, including technology, motor vehicle management, transportation, travel, and procurement and online acquisition tools. With offices spanning the globe, along with unique requirements and a diverse set of clients, it was imperative that FAS be accessible, powerful, flexible, and able to deliver business functionality within weeks or months, rather than years.

However, FAS lacked a unified information system to track opportunities generated by federal agencies or the efficacy of training programs in promoting the use of GSA services. The organization tried using software suites and spreadsheets, but had not been able to find an application that met all of its functional needs and was also user friendly. Additional customer data was stored in a call center system that tracked customer questions and issues, as well as a customer list management application that built mail and email marketing campaigns. GSA wanted a way to capture customer interaction data and share it across the organization.

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GSA needed an enterprise-wide CRM solution to ensure data quality and support data governance. Challenges in finding a solution that would provide functionality and ease of use led to the Salesforce.com CRM pilot. Citizant provided implementation services for the pilot on the Salesforce.com platform. Given the success of the pilot, the FAS Office of Consumer Accounts and Research (OCAR), with support from the FAS Office of the Chief Information Officer (OCIO), set out to implement the solution enterprise-wide.

Citizant's Solution Approach

As the prime contractor on this project, Citizant and a team of subcontractors from Acumen Solutions:

- ✓ **Composed a set of document deliverables**, including the Implementation Blueprint, Governance, and Project Charter. Also provided strategic guidance on enterprise implementation strategies.
- ✓ **Used the Agile Scrum development methodology** to deploy functionality incrementally, using 2-week to month-long iterations to deliver functionality aligned with changing business needs.
- ✓ **Created a streamlined solution delivery process for the CRM project**, tailoring traditional SDLC deliverables to take into account the process differences inherent in the delivery velocity enabled by a SaaS-based solution.
- ✓ **Formalized requirements that were the basis for test plans**, testing and release processes, acceptance criteria for each release, plus plans and requirements for future evolutions of software releases.
- ✓ **Designed the CRM solution and assessed third-party add-on products**, taking into account extended customer functionality, including:
 - Full opportunity and pipeline management
 - Contact de-duplication
 - Survey distribution and reporting
 - Nomination and approval for OCAR National Reports data workflow
 - Training and attendance tracking module
- ✓ **Successfully managed a two-phased implementation** with approximately 12 unique deliverables. The team initially started out with 2-week development cycles, but discovered that the planning, reviews, demos, and testing made this compressed timeframe too short. The team corrected and moved to a more effective and efficient month-long development cycle. The team has successfully delivered 10 iterations of customer-accepted user functionality on time.
- ✓ **Collaborated closely with staff members in FAS OCIO and OCAR**, helping to quickly scope and implement the core functionality necessary to deploy the CRM system to OCAR's National Account Managers and Customer Service Directors through all national regions.
- ✓ **Implemented and deployed** a hosted, enterprise-wide CRM system utilizing Salesforce.com's cloud-computing environment.

The Outcomes

The CRM solution is currently in use today by approximately 350 FAS employees in major cities throughout the country.

- ✓ **Citizant's method of using cloud computing** coupled with Software as a Service (SaaS) enabled GSA to consolidate contracts, lowering the overall business cost to acquire the solution.
- ✓ **Citizant also worked to set up integration with a third-party provider** — a leader in government contact and organizational data — to provide GSA with a consistent and accurate account structure, giving the agency better insight into its customer base and enabling more accurate, effective reporting.
- ✓ **As the U.S. government's lead agency for cloud computing**, this initiative will provide GSA with lessons learned for the installation of cloud solutions and provide the full certification and accreditation that is applicable to all Salesforce.com installations across the Federal government.
- ✓ **The innovative SaaS concept provided GSA with a full managed service solution** that includes the benefits of improved agility and implementation speed, with significantly lower development and Operations and Maintenance costs than traditional approaches.

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