

EBOOK

GovCon Growth Playbook

From Proposal to Award:
Rethinking CRM to Secure
More Wins



GovCon Competition Demands a New Approach

Competition among government contractors (GovCon) is changing. Government buyers are spending more money but extending fewer contracts to a shrinking number of players – making it harder for contractors to find new opportunities when they arise, let alone win bids.

Further complicating matters is that more spend is going to multiple-award contracts, which means more teaming per project, increased government oversight, and constant fluxes in regulatory standards have made capture and proposal processes more complex than ever.

Within this hypercompetitive, hypercomplex space where profitability is closely monitored, growth quite literally depends on everyone at your organization – business development and finance teams, project managers, and administrative workers – being able to build and manage good relationships with key government buyers and decision makers.

To do so effectively, your organization needs a customer relationship management (CRM) solution that acts as a collaborative, single-source-of-truth for everyone involved in the buying process and addresses the unique competitive challenges of GovCon head-on.

Read on for a discussion about what enterprise-level GovCon organizations really need in a CRM and the key functions that can help your organization find the right opportunities, build and manage government buyer relationships effectively, and ultimately drive growth – all in one system.

Why Is GovCon So Competitive?

The U.S. government spends \$700 billion on contracts every year – and this number is only growing.

But at the same time, there are:

- **15,000+** contracting companies
- **1,500+** new companies entering the field every year
- **11 million** contracts
- **64%** of the spend going to the top 200 firms

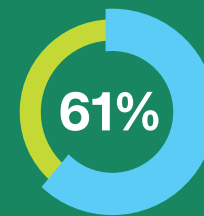
Rethinking CRM in GovCon: More Is Better

Popular, off-the-shelf CRMs do a couple of things well: collect customer contact information and track customer activities. These are critical functions for managing customer relationships.

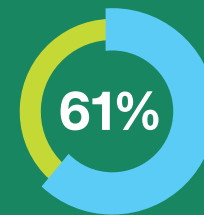
But enterprise GovCon operates in an ecosystem in which a customer-centric strategy must happen in parallel with a deep understanding of how government entities operate and purchase services and solutions, how you stack up against your competition relative to any given opportunity, and how your own capabilities map to market needs.

To win and sustain contracts, your organization has to both expand and narrow the field of possibility – find the contract opportunities you may not otherwise know about and zero in on the ones that best match the capabilities of your organization. You need insight into each customer, but you also need to connect customer information to project details and proposals. Just as important, you need to be able to categorize and execute each contract as a separate project, in line with government processes and workflows, so you can deliver solutions as promised – and do all of this within a CRM solution that provides critical workflow efficiency and collaborative capabilities.

GovCon Today: Takeaways from the 2023 GAUGE Report¹



of GovCon respondents said **identifying new revenue resources is their biggest financial challenge**, and **77% said winning new contracts is their most concerning issue**.



of respondents in the \$50+ million revenue band **said government oversight has increased for them**.



Leveraging personal relationships (82%) and using market intelligence tools (62%) are the top avenues for finding new opportunities.

¹GAUGE 2023 Report: Lead by Forecasting, 7th edition. Unanet. 2023.



The best solution, though, is much more than just a standard CRM or enterprise resource planning (ERP) system.

Your organization needs a coherent, project-based CRM purpose-built for enterprise GovCon that can support the entire business development and project life cycles while connecting every team involved – creating a clear picture of your organization's pipeline for accurate forecasting and planning and helping you capture not just any business opportunity but the right opportunities for your organization.



Key GovCon CRM Functionality

To make GovCon project lifecycle management more effective – from initial discovery to final proposal – organizations need to remove the silos that commonly exist between departments and teams and between the project and the customer to gain a complete and collaborative operating view of the entire lifecycle.

But where a traditional CRM keeps those silos in place, a CRM purpose-built for GovCon can connect people, projects, and data seamlessly in a single, integrated system – while providing key, GovCon-specific capabilities for understanding markets and government buyers, searching opportunities, planning and tracking pursuits, creating and delivering winning proposals, and managing the project once awarded.

Here's a look at the most important functions a GovCon CRM needs to provide:



Market intelligence

Of all the many, many open contracts out there, which are actually viable for your organization? Who do you already know at the federal agency? And which organizations are you competing against?

The role of market intelligence in GovCon is to provide valuable insights at the government buyer, industry, and competitor level to help you make sense of available opportunities and focus on the ones that align best with your organization.

A GovCon CRM must efficiently and strategically filter, identify, and target new opportunities for you, so you know when to act. AI-powered queries, data, and insights optimize the research process, helping you perform strategic reviews and assessments faster and uncover relevant future opportunities based on your contract award history.

Specifically, the CRM should help you:

- Profile agencies, federal contract vehicles, North American Industry Classification System (NAICS) categories, Product and Service Code (PSC) categories, federal grant programs, and major defense acquisition programs.
- Capture deep insights and granular details about each opportunity – from dates and requirements to estimated award value and past performance.
- Find and analyze emerging and active competitors in your market so you know how to adjust strategies and bidding tactics
- Analyze and gain clarity around complex spending data and learn how government buyers allocate funds.
- Explore a variety of vehicle types and identify which contract vehicles fit your organization's needs – eliminating guesswork.
- Search, profile, and understand the behavior of government buyer personas and teaming partners, and uncover high-value leads.



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We believe data analytics will not only give us better reporting but will also tell us a story about how we can approach the market better from a customer perspective. Those efficiencies and capabilities are the reason we switched from an off-the-shelf software to Unanet.”

Spurgeon Robinson
President & CEO, IMPACT



Capture optimization

Which opportunities does your organization have a high probability of winning? Which do you have a low probability of winning? Where is the opportunity in the procurement process?

Capture optimization is about efficient people management, data entry, and structured, repeatable capture processes that allow you to understand which opportunities are worth your time, maximize the use of resources, unify the efforts of your team and partners, and make better decisions faster.

A GovCon CRM with modern integrations and apps ensures your business development teams can access and update market intelligence – including adding opportunity data, contacts, and insights – on the go and in the moment. Meanwhile, dashboards, alerts, and workflows give you a single operating view that not only saves time but also helps your organization avoid pursuing opportunities that aren't a good fit.

Your CRM should specifically help you:

- Streamline and formalize the processes of creating, tracking, and evaluating pursuits to cull no-go opportunities earlier in the process and focus on the ones that will increase your win rate.
- Connect teams across your organization to collaborate in capture and bid management.
- Get customizable alerts when new opportunities materialize, based on configurable, saved searches for contracts and grants that match your specific criteria.
- Automatically track government activity so you're always aware of important changes.
- Combine your pipeline with pursuits to manage opportunities at the granular and big-picture levels.
- Track key metrics such as PWIN, estimated value, and award date and generate comprehensive reports to help you make data-driven decisions.
- Create your own vendor profile and find potential teaming partners as well as competitors for every pursuit.



Unanet will build infrastructure that makes sense for our growth by helping us onboard people better and streamline our processes. Unanet offers substantial advantages to our organization by simplifying contact data entry and proposal generation, while also enhancing pipeline management, relationship management, and business development.”

Jason Cunningham

Chief Operating Officer, Eikon Research



Pipeline management

Who are your potential buyers? What leads are you following? And what level of staff do you need in place to operate effectively?

Pipeline management allows your executives to track and drill into opportunities by agency, region, contract type, and more to understand what's fueling growth at your organization so you can forecast and plan accordingly.

Fast, accurate planning with a GovCon CRM is possible with custom dashboards and industry-specific reports you can easily view, arrange, and edit – allowing you to track new leads and manage your backlog to enable clear capture planning and resourcing. When you know what's in the pipeline, you can also surface and forecast hiring needs with greater precision to ensure that upcoming projects are adequately staffed.

Your CRM should specifically help you:

- Gain insight into your pipeline health with a view into the past, your current standing, and your long-range forecast.
- Categorize contacts for easy reference and track opportunities by phase.
- Understand resource demand and plan accordingly.
- Shift forecasts and make adjustments as opportunities move through the funnel.
- Access real-time data, project notes, and code fields to enable detailed analysis.
- Track key metrics such as bid-to-win ratio, bid-to-loss ratio, length of the sales process, phase statistics, labor and skill set utilization, revenue targets, rate analysis by year, forecast comparisons, and pipeline snapshots.



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Unanet's ability to automate business processes is one benefit, but another is how much visibility we have into both our existing projects and our pipeline. With Unanet, we'll be able to make smart business decisions about resource allocation, our incoming pipeline of work, and our overall trajectories. With Unanet, we can be strategic in how we manage the business.”

Duy Duong

President & CEO, P17 Solutions



Proposal creation

What are the unique needs of the potential customer?
What data do you need to create the proposal and submit it on time – and where are you going to find that data?
What does your organization do well?

One of the most important functions in GovCon is proposal creation. Not only do you need to ensure your organization can meet the notoriously intricate requirements that come with government requests for proposal (RFPs) and contracts, but you also need to showcase your organization's expertise and price your proposal for profitability.

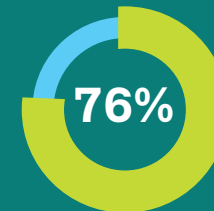
This is why timely, accurate proposal creation is also one of the most difficult functions for GovCon that poses several challenges for many organizations – with a major one being continued reliance on sub-optimal CRM and pipeline tools to inform proposal creation. Almost a quarter of GovCon organizations still use Excel-based manual processes, 10% use some other tool, and 30% don't use a CRM at all.²

^{2,3} 2021 GAUGE Report. Unanet. August 2021.

Why Is Proposal Creation So Challenging?³



of GovCon organizations have difficulties with too little communication with the customer or contracting officer.



recognize challenges with unrealistic timelines from opportunity to proposal due date.



find it hard to understand the scope of the project.

With a GovCon-based CRM, you benefit from streamlined, automated, data-driven proposal creation. You can access and maintain a library of all your past project documents and experience data that have worked for and informed prior contracts, along with customizable templates automatically generated from the most up-to-date data in the CRM. You always know that you're submitting the right files and can revise proposals on the fly with your team as needed.

Learn more about how to create winning proposals with our 7-step guide.

Learn More

Specifically, the CRM should help you:

- Efficiently create and automate proposal documentation – at scale and with real-time data on hand.
- Review the RFP and drafts of the cost proposals with all teams and ensure every aspect of the proposal is included.
- Handle multiple rounds of proposal revision, if needed.
- Know how your wrap rates – including direct labor costs, fringe benefits, overhead costs, and general and administrative (G&A) costs – will be affected by a contract win.
- Understand which subcontractors and teaming partners are needed to fulfill the terms of the potential contract.
- Conduct a price-to-win analysis – factoring in your competition, solutions to the RFP and related costs, and how the award will be made.



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Unanet will be the nucleus of our business ecosystem that will help us automate, integrate, and consolidate data into one intuitive dashboard. This will help us achieve efficiencies, consistency, and compliance within our company from contract awards to contract closeouts and everything that happens in between.”

Vanessa Bryan

Principal Director of Corporate Operations, Draper



Stay Ahead of Your Competition with Unanet

Unanet's purpose-built, cloud-based CRM for enterprise GovCon is a relationship, market intelligence, pipeline, and proposal management solution built specifically for government contractors – with automated features and insights that can help you and your teams target and pursue the right opportunities and efficiently and cost-effectively prepare proposals that win new contracts over the competition.

Unanet's CRM provides an easy-to-use, frictionless user experience via Outlook email, Kanban-style views, and a mobile app so your business developers have access to and can view, understand, and update customer and opportunity data wherever they are. At the same time, your executives get the scalable, strategic insights they need to make key business decisions. And all stakeholders – from the finance team to project managers – get access to the necessary information they need to communicate, collaborate, and provide input every step of the way.



Identify new, qualified opportunities

With Unanet, you're able to use comprehensive market intelligence to find contract opportunities that match your organization's capabilities and research contract requirements, history, and specific details. You can cross-collaborate within your organization to rate each opportunity. And you can develop a deep understanding of your existing contact, customer, and partner relationships.



Grow relationships

Unanet makes it easy for anyone at your organization or on a project team who has a close relationship with a customer to share and update that customer's information. You can manage customer and partner contacts and company information, as well as track any touchpoints that happen along the way. You also have access to the project history of customers to help inform current and future projects.



Enhance relationship-building with AI

Unanet uses intuitive, people-centered artificial intelligence (AI) and machine learning so you can get the most value and insight out of your data. AI-powered tools identify and extract contact information from your emails and over 200 public data sources, then automatically update the CRM so you always have access to the latest information. Real-time insights enable you to handle business development calls on the spot with savvy. And AI-based research saves you time by researching and creating new company records from any URL you give it.



Manage your pipeline

With Unanet, you can get all your teams on the same page quickly to enable strategy and forecasting. You can monitor and manage all opportunities, monitor progress and performance, calculate your soft backlog, and plan strategic pursuits. You're able to track opportunity activities and those of your competitors, while Go/No-Go gates help you avoid wasting time on opportunities that aren't a good fit.



Generate quality, winning proposals

Unanet sets up your teams for success with tools to submit and track proposals and RFPs and access a single source of truth for past projects and experience data. You can manage team resumes, experience, and skills through Unanet's ERP and Human Resource Information System (HRIS) integrations. And you can generate your proposal files in InDesign and Word, and PDF formats.

By enabling key, GovCon-specific functionality, Unanet's single, integrated CRM saves your organization time and money and keeps you focused on building and managing profitable customer relationships. With a variety of collaborative tools and workflows that help you capture the right opportunities and win new contracts and recompetes, you can stay a step ahead of your competition and drive business growth.



We chose Unanet for its ability to scale with us, provide the government contract support for the increased number of bids we are winning, and to merge a wide variety of siloed data sets into clear, relevant snapshots that will help our team strategize for the future.

**Keith Johnson, Vice President,
Aspen Medical**

Unanet CRM

Customer Spotlight: Evans Consulting

Evans Consulting is a mid-sized government contractor with 15 years of GovCon experience. The firm recently completed an acquisition and needed a new system and processes to manage growth. It was looking for a solution that could bring much-needed efficiency, forecasting ability, and analytics to its GovCon decision-making.

Evans Consulting had difficulty forecasting pipeline and was struggling with inaccurate and outdated information. The firm also had difficulty integrating its GovCon data and processes with other business systems and experienced low user adoption of the firm's existing ERP. The lack of reliable information and efficiency was having a detrimental impact on performance in the form of decreased win rates and efficiency.

Evans Consulting found the solution they were looking for in Unanet's CRM. As a result, the firm was able to:

- Integrate Unanet's CRM with the ERP
- Get single-view visibility into the pipeline
- Better identify opportunities
- Engage in much more accurate forecasting and decision-making
- Increase user adoption using the Outlook integration
- Boost efficiency and time savings
- Regain four days of analyst time that was previously lost in managing spreadsheets.



We're seeing so much more impact because people are starting to live in it and adopt Unanet as part of their work process."

Yuctan Hodge II, CFO Evans Consulting

Learn more about Evans Consulting's story and the quantifiable impact that Unanet's CRM had on the firm.

[Learn More](#)

Get Started

Contact us today to set up a consultation or demo and learn more about how Unanet can support your organization in finding, capturing, winning, and managing GovCon opportunities.

Contact Us

About Unanet

Unanet is a leading provider of project-based ERP and CRM solutions purpose-built for architecture, engineering, and construction firms, professional services firms, and government contractors. More than 3,400 project-driven organizations depend on Unanet to turn their information into actionable insights, drive better decision-making, and accelerate business growth—all backed by award-winning support delivered by a people-focused, forwardthinking team for whom the success of your projects, people, and financials is paramount.

www.unanet.com

