U.S. Dynamics Organizes Their 12-Step Proposal Tracking Process with Pipeliner CRM

U.S. Dynamics

INDUSTRY:
Aerospace and Defense Support

USE CASE:
✔ Non-Traditional Sales Process
   Organization

WEBSITE:
www.usdynamicscorp.com

Steven Pitkoff
USD's Marketing Coordinator
U.S. Dynamics

Since 1962, U.S. Dynamics Corporation (USD) has been a premier solutions provider to the aerospace and defense industry. The military is often in need of components and equipment that are still in operation, but from a manufacturing standpoint have become obsolete and so are hard to maintain, or for which replacement parts are difficult to find. USD provides maintenance, repair, overhaul, and manufacturing services for navigational equipment, radar systems, and legacy aircraft.

USD's accomplished team of engineers is knowledgeable in a wide variety of disciplines. These include electronic, mechanical, electromechanical, microwave, digital, analog, as well as a focused strength in radio frequency engineering. USD regularly provides high quality solutions to meet challenging and often customized requirements, and supports customers on projects others cannot complete. Their fully integrated 85,000 square foot facility in New York allows for all aspects of a program to be supported on site – from design through shipping.

Integration of Pipeliner CRM

The use of Pipeliner CRM by U.S. Dynamics is a bit different from that of a traditional sales organization. The company uses Pipeliner CRM

Pipeliner

to inform the company's proposals process. After a Request For Quote (RFQ) is generated and USD is ready to move forward with a proposal, all the line items for a particular RFQ are imported from the company's Access database into Pipeliner CRM. Each line item is displayed in the same way as, traditionally, a sales Opportunity would be displayed. Each RFQ is entered into Pipeliner CRM as an "account" so that each line item is associated with its RFQ.

Why Pipeliner?

Steven Pitkoff, USD's Marketing Coordinator, brought Pipeliner CRM into the company: "We use an Access database, which is where the data entry person enters the RFQ information, all the line items," Pitkoff explains. "We'd been using that for about seven years, and essentially the sales group had no idea now to see where line items were in the quotations process."

"I was tasked with going out to find a pipeline tool that displays these line items, and I found Pipeliner CRM – which displays information visually. It seemed to be the best option; it visually depicts all the line items and where they are in the proposals process. This was a great improvement over the standard database view which was just line items; it doesn't really show much, it's not visual."

The Pipeliner sales and technical support team assisted Pitkoff in customizing Pipeliner for USD's particular use.

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> U.S. Dynamics
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> Being able to see where everything is in the quotations process just beats looking at a line item in a proposal database. It's the visualization of our pipeline. Plus it's fully customizable, it's easy to use, tech support is great, and it's affordable.

Feedback

Pipeliner CRM was a perfect fit for USD's proposal process.

"The sales and proposals team, they all like the tool," Pitkoff says. "Getting someone to use it is easy. Once they use it, they're like, 'Wow, this is really easy to use! You just drag and drop.' The management reports are fully customizable, which gives you different views of the pipeline and what is going out."

"At the same time our President is looking at Pipeliner CRM to see the overall view of the pipeline, and what's going on in general. He can see exactly where the company is headed in terms of possible quotes going out. He likes it, too."

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Step1:	RFQ (RFQ ID) - 100 %	1 Day(s)
Step2:	Additional Information Needed - 0 %	Disabled
Step3:	Initial Determination - 100 %	1 Day(s)
Step4:	Research - 100 %	3 Day(s)
Step5:	Source Approval Review - 100 %	3 Day(s)
Step6:	Estimating - 100 %	5 Day(s)
Step7:	No Bid - 100 %	7 Day(s)
Step8:	Quoted - 100 %	1 Day(s)
Step9:	Initial Follow Up - 100 %	5 Day(s)
Step10:	Pending Status - 100 %	90 Day(s)
Step11:	Follow Up 2 - 100 %	5 Day(s)
Step12:	Resolution - 100 %	

Proposal Process

USD's proposal process, while different, is a system that still runs very similarly to a standard sales process, according to Pitkoff:

"The line items are generated from our integration tool; it pulls them from our proposals Access database which has all of our Request For Quote information, and the line items are then populated into Pipeliner. They end up in the first column, which is called 'RFQ.' "

"The second column is 'Additional Information Needed,' which is where a line items sits while we gather or obtain additional information on a line item."

"The third column is 'Initial Determination.' This is where someone is deciding if we want to pursue the line item or not, and it could be archived at that point if it is not pursued."

"Fourth is 'Research': we're researching the line item. That can be anything from looking at drawings, or gathering procurement histories, or similar tasks."

"The fifth step is 'Source Approval Review.' This is where we're submitting a Source Approval Request to the US Government to be approved on a part."

"The sixth step is 'Estimating' and that's when we're estimating a line item that's going to eventually turn into a quote."

"We have the 'Quoted' column which is when something is quoted."

"When we know they've received the quote, it goes to the 'Pending' status. It stays there for about ninety days, and then someone will follow up

to see if the quote needs to be revalidated or whatever needs to happen with it."

"We continue to follow up until we get 'Resolution' which, hopefully, is a win."

Rollout and Administration

The rollout of Pipeliner CRM was quite easy, according to Pitkoff:

"It a took a year from saying we wanted to use Pipeliner to bringing it in," he says. "We've been customizing it since the rollout, but the rollout was pretty simple. We just pretty much turned on the integration tool one day and it worked."

"Administration is very easy. Pipeliner's tech support has been more than helpful when needed, but I'm a fairly technical person so I can figure it out. I'm sure someone with limited technical knowledge would be capable of using it."

"I would definitely recommend Pipeliner to others," Pitkoff concludes. "Being able to see where everything is in the quotations process just beats looking at a line item in a proposal database. It's the visualization of our pipeline. Plus it's fully customizable, it's easy to use, tech support is great, and it's affordable."

PipelinerCRM

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