

Capture Management

# Case Study



**OCTO**  
an IBM Company

**Octo** Injects New Visibility and Efficiencies into Its Business with Help from TechnoMile

 **TECHNOMILE**

Since 2006, Octo has been helping the U.S. Federal Government modernize its systems and infrastructure using the most modern systems, software, and methodologies available to increase mission success of federal civilian, health, intelligence, and defense agencies. Headquartered in Reston, Virginia, Octo provides Agile, DevSecOps, Artificial Intelligence, Cybersecurity, Cloud, Open Source, and Data Management and Analytics services and solutions. The company has a portfolio of cutting-edge products that use emerging technologies and it recently launched oLabs, a 15,000 square foot innovation center where Octo's cross-functional teams of engineers, academics, technologists, thought leaders, and domain experts rapidly prototype emerging technology solutions for and in collaboration with its federal customers.



**2006**  
Founded



**Reston,  
Virginia**  
Headquarters



**1000+**  
Company Size



**IT Services and  
IT Consulting**  
Industry



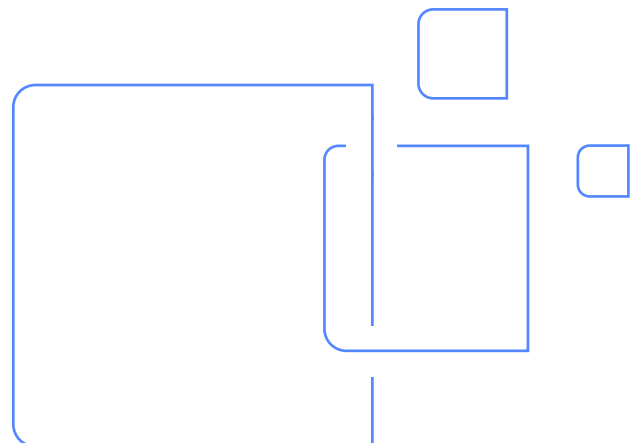
“It was the whole package! We liked the combination of TechnoMile’s offerings and Salesforce’s capabilities. We liked that we could make the solution our own, meaning the system would adhere to our processes, integrate with our other systems around the company, and we could gear the user interface and user experience to Octo and our needs.”

Mary Hess, VP of Capture Governance and Proposals at Octo

## Seeking a User-Friendly, Connected System

In 2019, Octo was on its rapid growth trajectory and found itself needing to upgrade its CRM system to better serve the needs of both the business and the company’s CRM users. Explains Mary Hess, VP of Capture Governance and Proposals at Octo, “Octo was growing at an

amazing rate and we were growing out of our SugarCRM system. We knew that in order to truly map out our growth plan and pipeline, we needed a CRM that was more user-friendly and capable of integrating with other software within our company, particularly our finance systems.”



## A Solution to Make Their Own

Octo ultimately selected TechnoMile's Growth Suite, which is a CRM solution designed specifically to address the complexities of selling to the federal government. It's deployed into a company's Salesforce or Microsoft Dynamics environment, layering on unique features and capabilities required by government contractors. Says Hess, "It was the whole package! We liked the combination of TechnoMile's offerings and Salesforce's capabilities. We liked that we could make the solution our own, meaning the system would adhere to our processes, integrate with our other systems around the company, and we could gear the user interface and user experience to Octo and our needs. And we were confident about the transition – that TechnoMile would be able to seamlessly transition our data from SugarCRM into our new Growth solution."

Octo also had a vision for how its new CRM system could support needs beyond those of the company's Growth teams. Explains Hess, "As part of our implementation, we wanted TechnoMile to design and develop an equation to generate a revenue projection report for our Finance team. This report plays a big role in our AOP (Annual Operating Plan) and revenue development."

## A Smooth, Collaborative Implementation

In October 2019, Octo went live with its TechnoMile solution following a successful implementation project. Recalls Hess, "Our implementation was smooth. The TechnoMile team was available when we needed them and everything was customer friendly – there was never really a 'no.' It was always, 'well, we can

do XYZ and get the same result you're looking for.' We had great working sessions between our Octo SMEs and TechnoMile's SMEs to get our revenue projection report built, and TechnoMile worked with Unanet to accomplish a seamless integration with our financial system. So, the collaboration was great."



## Training for a Rapidly-Growing Team

Octo relied on the TechnoMile team to provide end user and admin training to enable a successful launch of its new Growth solution. And, since Octo first implemented its system, several acquisitions have tripled the size of the company's Proposal team and its Growth teams have more than doubled, necessitating additional user training – and the company continues to have its eye on M&A targets. Says

Hess, "The training was amazing for our various user groups when Octo first made our transition to TechnoMile. And then with each acquisition, TechnoMile has done training for those new users. We have these trainings recorded and TechnoMile keeps them updated to reflect changes as our solution evolves. So, it's been great – TechnoMile is always willing to help with the training needed for our user base."

## Driving New Efficiencies

Having their TechnoMile solution in place has delivered new efficiencies for the Octo team and reinforced adherence to the company's business processes and how opportunities are managed. Explains Hess, "We use our TechnoMile solution as we progress through our bid process and lifecycle. Each time we go through a stage gate we're in the CRM, rather than having our Growth team spend time updating slides. We use each of the tabs in the interface to walk through the requirements and to review hot buttons for the opportunity and the customer, next steps and action items, and the opportunity's health – it's all tailored to the way Octo manages our business."

Hess shares that the efficiency of administering the solution has also been a win for Octo. "I really appreciate the usability of the system as an admin. It's very user-friendly and it takes me no time to make changes myself – we don't always have to go back to TechnoMile. That's a key differentiator because it's such an efficient process for us!"

The efficiencies brought by the software haven't been limited to Octo's Growth team. "We also have our business lines using TechnoMile. So, we don't just have super users among our Growth team, we have super users among leadership within our four business units as well as program and project management staff. This is because we use our system not just for pipeline projection, but also to streamline and enable activities like revenue and budget projections," says Hess.



## Gaining Visibility into ROI and Pipeline



The metrics that Octo can now readily produce from its TechnoMile solution are also highly beneficial, giving the company a clear picture of not only its pipeline, but also the ROI associated with its investment in new products and technologies. Shares Hess, "We've built capability alignment into our TechnoMile reporting that speaks to each opportunity from a technology standpoint – is this opportunity going to use Octo products? What type of technical capability are we working on for this opportunity? Has this customer had an oLabs visit? Capturing these types of metrics in TechnoMile allows us to understand the ROI for the products we're creating and the technologies we're using – that's been a wonderful part of our solution. And it's not just reporting on the technology side, it's on pipeline as well. We can now easily answer questions like, 'How

many opportunities did we have that went from stage 'positioning' to 'qualification' and then back to 'positioning' because we had to go back to the drawing board?' We can easily pull the metrics we need to report to our CFO and to our Board."

## An "Open Door" Partnership That Supports Growth

Hess shares that Octo's experience as a TechnoMile client has been a positive one. "We have an excellent relationship with TechnoMile. Our Customer Success representative meets with us once a month and we discuss what we could be doing differently or better with the system, as well as any hot button items that our users have. That constant communication and the open door that TechnoMile has with us has been great!"

It's a partnership that's focused on collaboratively working together to maximize the value of Octo's solution. Says Hess, "TechnoMile has been so good at showing us what's 'the next best thing' that could benefit us so we can budget for it – for example, adding automation to our task order management. We're also considering additional system integrations – how can we enable workflows that will help Octo's service centers, which include our solution architects and our contracts and pricing people? With TechnoMile's help, we're extending the value of our solution within our company in ways that will support Octo's continued growth."

## About TechnoMile

From go-to-market to contract closeout, TechnoMile provides transformative cloud solutions that empower companies to find, pursue, win, and retain more business with the government. With our best-in-class cloud platform, companies optimize BD and capture processes, gain unique competitive insights, source contact intelligence, automate and de-risk the contract lifecycle, and gain an information advantage that elevates enterprise performance.



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