RePoint Technologies Case Study

1 INTRODUCTION

RePoint Technologies partnered with InfoWise on 2/22/2017. As part of the InfoWise partner setup, a formal training was scheduled for 2/24/2017. However, RePoint Technologies Chief Architect (Greg Galipea) wanted to learn the platform on his own because he feels he learns better that way. On 2/23/2017 Mr. Galipeau attempted to take an existing "Opportunities" list and reconfigure it for InfoWise Smart Forms, Alerts and more. This Case Study is built to show the results of that 1 day effort.

2 BACKGROUND

RePoint Technologies is a technical service company that primarily works on Government projects. A common requirement of Government technical services companies is to track Opportunities through the Government proposal lifecycle. Typically an Opportunity is found on a Government contracting vehicle website (such as FedBizOps.gov). After Business Development personnel find an Opportunity, Government technical service companies like to track the Opportunity, decide if it is worth bidding on, and eventually create a Workspace so the proposal team can collaborate on the response to the Government.

RePoint's initial solution to solve this problem was an Opportunity Tracker list in SharePoint. This list contained:

- Title of Opportunity
- Status
- Client Name
- Type Code (ex: RFP, Sources Sought, etc…)
- Client Type (Federal, Private, etc…)
- Release Date
- Submission Deadline
- Description
- Link to Solicitation
- Analysis
    - Pros
    - Cons
    - Notes
- Team

2.1 ISSUES WITH SHAREPOINT LIST SOLUTION
1. New/Edit form too long because of large multi-line text boxes

2. View of List not easy to see – Note: We grouped the list by Status (i.e.: Bid, No-Bid, Won, Loss, etc…). However, even with a simple group list it didn't have any color to it. It was hard to differentiate what to focus on.
3. Proposal Site Creation – Our process dictates a SharePoint Team Site (based off of a custom Template) whenever an Opportunity gets to a Bid phase. We manually created these sites and linked them back to our Opportunity tracking list.
4. Customer Relationship Management (CRM) – we implemented a pseudo CRM by using Lookups to add teaming partner companies, contacts and more. This was difficult to manage because we constantly had to go to other lists in the system to add contacts so they show up in the lookup dropdowns of the Opportunity Tracker.

2.2 RESEARCH

After identifying issues with our currently solution we researched other solutions. Microsoft Dynamics CRM was our top choice to replace this solution. However, that is expensive (around $90 per user per month). As a small business we did not want to incur that cost.

2.3 CLIENTS

RePoint actually has 3 current clients with a similar problem and 1 more potential client we are in discussions with right now. They are all technical service companies that support the Government and wish to use SharePoint to help manage that process. For our past clients, we used a similar structure as the Opportunity Tracker we use internally. However, we implemented some of the bells and whistles that our internal application doesn't have:

1. More customized Site Templates
2. Ability to create proposal site from Opportunity Tracker list
3. CRM capabilities

Each one of these implementations required a SharePoint developer to create the custom functionality. This costs our clients time and money that could have been spent on other business processes.

3 INFOWISE SOLUTION

Our strategy to validate the functionality of the Infowise Solution was to take our existing Opportunity Tracker and build the functionality on it that we need to be more successful. Within 1 day we were able to add the following capabilities and streamline our process:

1. Color Coded list to track Opportunities easier

2. Custom Form with Tabs to enter data easier

3. Dynamic creation of Proposal site when the Status of the Opportunity turns to "Bid"

4. Manual Creation of Proposal Sites if someone wants to create one before it turns to Bid
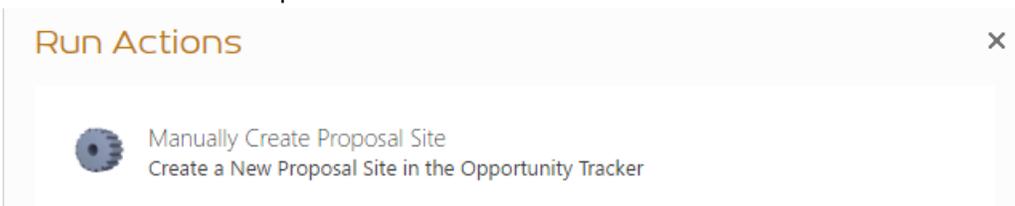
5. Alerts to Management once status change

3.1 RESULTS

One day worth of configuration using Infowise gave us the solution we've been striving for (but didn't have the time to build). In addition, now that we see the functionality of Infowise, we are adding more to the solution:

1. Lead Generation List for opportunities found through traditional (non-Government) avenues
2. Ability to turn Leads into our Opportunities list once they hit a status
3. Complete CRM capability that mimics what is available in Dynamics CRM

We estimate it will only take us an additional day or two for this new functionality.