



# GovCon CRM

*Dynamics 365 for Government Contractors*



## GovCon CRM - Capture Management Process

**GovCon CRM** provides in-depth analysis of the government contracting capture management process through market intelligence, opportunity review workflows, proposal collaboration, and management of post-award activities. **GovCon CRM** can be used to:

- Create and organize opportunity reviews to manage bids and teams
- Streamline the proposal process through complex reviews and optional SharePoint and Microsoft Teams integration
- Setup custom reviews using workflow management
- Generate your own reports and dashboards to streamline operational and strategic communications

GovCon CRM provides government contractors with a flexible solution to automate business capture processes. It covers the sales process from finding opportunities to qualification, review, proposal submission through contract award.

## Opportunity Management

The **GovCon CRM** data model includes all elements that describe the opportunity, including place and period of performance, contract vehicle, set-aside status, required certifications, and customer information.

### Manage Proposals

**GovCon CRM** allows an organization to manage proposals through the use of a process flow. The proposal will only advance through the process flow if certain criteria in each stage have been met, which can be customized. This allows users to track proposals easily, streamlining the processes.

### Teaming

The solution tracks teaming arrangements as well as related nondisclosure agreements and teaming agreements. You can designate your company's role as a prime or a subcontractor on an opportunity.

## Blanket Purchasing and Task Orders

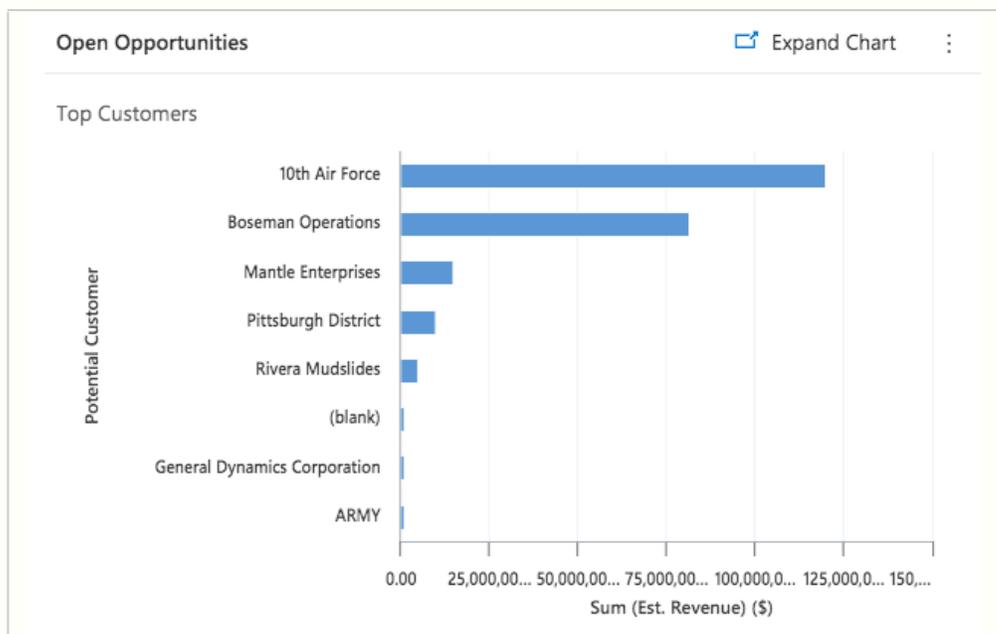
**GovCon CRM** tracks pursuit of blanket purchase agreements (BPAs) and indefinite date indefinite quantity (IDIQ) contracts as well as associated task orders.

### Activity Tracking

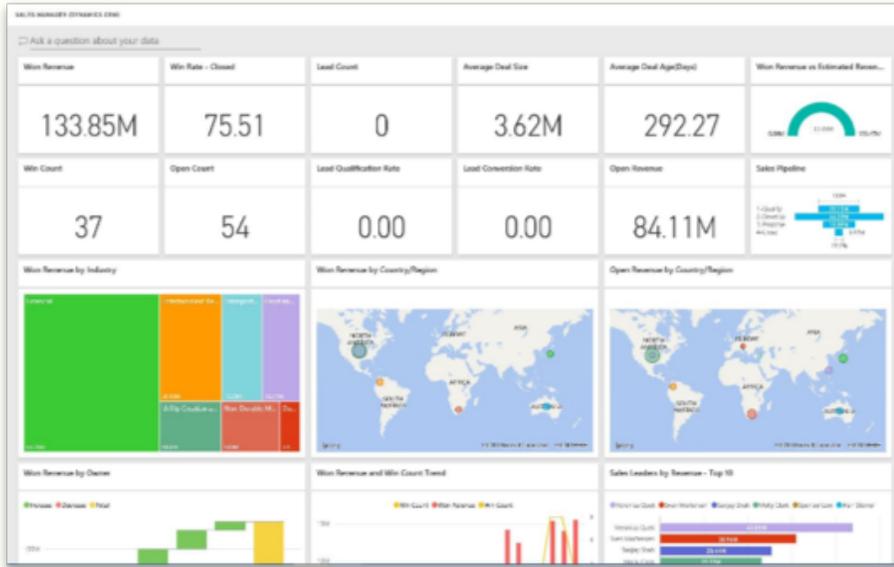
GovCon CRM tracks the activities of your business development team, including emails, meetings, phone calls and tasks. You can create tasks for yourself or assign them to others, such as following up with prospects and contracting officers.

### Flexible Reporting and Data Visualization

Creating custom reports for different users can be time consuming. **GovCon CRM** empowers users to easily build new custom reports using Microsoft SQL Server Reporting Services. Outlook email integration is also included for many functions, such as applicant notifications and correspondence.



Optional integration with Microsoft Power BI provides advanced visualizations.



## Review Process

**GovCon CRM** allows organizations to define workflows specific to a unique review process. The interface will show the active reviews, and allow a proposal to move forward only when the review process is complete. This solution supports both internal and external teaming capabilities in order to allow transparency throughout the review of each proposal.

## Works with popular Microsoft products

**GovCon CRM** is based on Microsoft Dynamics 365/Power Apps, so it works seamlessly with popular tools including: Office 365, Outlook®, Word, Excel®, and SharePoint. Office SharePoint Server is often used for document management and collaboration integration.

<p><b>Market Intelligence</b></p> <ul style="list-style-type: none"> <li>Research (public and subscription services)</li> <li>Competitive Intelligence</li> <li>Award History</li> <li>Government Account Lists</li> </ul>	<p><b>Opportunity Review Processes</b></p> <ul style="list-style-type: none"> <li>Bid/No Bid</li> <li>Bid Team</li> <li>Teaming</li> </ul>	<p><b>Proposal Processes</b></p> <ul style="list-style-type: none"> <li>Simple or Complex Reviews</li> <li>Bid Calendar</li> <li>Optional SharePoint Integration</li> </ul>	<p><b>Post-award activities</b></p> <ul style="list-style-type: none"> <li>Reporting</li> <li>Process Improvement</li> </ul>
--	--	---	--



[Contact us](#)  
[www.infostrat.com](http://www.infostrat.com)  
[sales@infostrat.com](mailto:sales@infostrat.com)