

Don't settle for spreadsheets: Evans Consulting's transformational journey with Unanet

Motivation to Find ERP and CRM Solutions

Evans Consulting, a dynamic and fast-growing government contractor, found themselves facing a critical need for streamlined operations and enhanced business development. With 15 years of government contracting experience, Chief Financial Officer (CFO) Yuctan Hodge II joined the organization after it had implemented Unanet for enterprise resource planning (ERP). It soon became apparent that the other existing business systems and processes they used alongside Unanet were no match for the firm's growth.

Evans would need a new system and new processes – and they needed a partner to help. They found that partner in Unanet, who helped them increase the organization's efficiency, forecasting ability, and access to actionable analytics to help drive more informed decision-making.

The Challenges

When Hodge joined Evans Consulting in early 2022, he was impressed by Unanet. "I've used plenty of other ERPs in my career," said Hodge, "and Unanet was easier to use than the other platforms I'd spent time with." Hodge observed multiple challenges within the organization, however, including:

- **An opportunity pipeline without clear visibility.** A lack of clarity into its pipeline led Evans to struggle with managing outdated or inaccurate information.
- **Lack of user adoption.** Evans had identified an ERP tool in Unanet, but many users throughout the company weren't using it.



Evans Consulting is a mid-sized government contracting management consulting firm focused on human-centered operational consulting and digital transformation that has grown quickly in recent years. Collaborating with large companies to create healthy organizations where all can thrive, its clients include government agencies, nonprofits, and private sector companies.

- **Integration issues with other existing tools.** Evans Consulting was grappling with challenges stemming from the adoption and fusion of their other business software solutions.
- **A need for more efficiency and better effectiveness.** The lack of user adoption combined with other existing tools not being fully integrated into their daily operations affected overall performance.

Hodge focused on enhancing efficiency and productivity by increasing the adoption of the Unanet ERP tool across the organization while exploring other ways that Unanet software and services could help.

The Solution

Buoyed by his belief in Unanet GovCon ERP, Hodge decided to further optimize operations by implementing Unanet CRM. This strategic move aimed to enhance client relations and bolster the superior service Evans offered to its government clients.

- **Take full advantage of Unanet's ERP and CRM solutions.** To help them better organize their data, Evans continued using Unanet's ERP and implemented its CRM solutions.
- **Fully integrate Unanet CRM with all of its existing systems.** The firm sought a comprehensive tool that would offer a singular, consolidated view of their entire operations. Unanet CRM was integrated with Evans' existing systems, including Unanet's ERP, enabling better visualization of the pipeline and enhanced planning and resource allocation.
- **Push for full adoption.** The company looked to get more of its people using the software to maximize its investment in Unanet's functionalities.
- **Take advantage of increased support to bolster growth and scalability.** With Unanet, Evans now had ERP and CRM capabilities to effectively match their growth and expansion as a company.

Evans was now ready to enhance its overall operations – but how did they do it?



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

The Approach

From his previous experience, Hodge understood the significant advantages of using one unified system for ERP and CRM needs to align his business, keep data in one place, and save time. Here's how Evans drove widespread user adoption:

- **Help the team understand why they should use Unanet.** To ensure a smooth transition, Hodge actively promoted the benefits of Unanet and brought in Unanet experts to help. This demonstrated how it could significantly enhance everyone's workflow. These efforts paid off as the team embraced the new system, leading to immediate improvements and time savings.
- **Engage in close collaboration with its Unanet customer success manager.** Hodge worked hand-in-hand with Evans' dedicated customer success manager from Unanet to plan and implement the solutions. "Support from the Unanet staff has been fantastic," said Hodge.
- **Conduct training sessions to familiarize the team with the tools.** Training sessions were held for program managers, task order leads, and other relevant staff, minimizing the stress associated with learning a new system.

"When you think about the tool itself, it's the adoption within the organization that matters," said Hodge. "You need to spend time thinking of the impact on your people, the impact on your organization, and how you can speed up adoption to get to the value."



4 Days

The amount of analysts' time Evans Consulting regained by implementing Unanet ERP and CRM, previously lost in managing spreadsheets

The Impact

The recent addition of Unanet CRM has provided crucial visibility into the operations and sales pipeline, allowing for more accurate forecasting and the identification of opportunities. An increase in adoption of Unanet GovCon ERP has allowed Evans to experience the full benefit of its partnership with Unanet. Hodge said that Unanet's ease of use is better than other ERP platforms he's worked with and has helped greatly increase the number of people within the organization who use the system.

With a new strategy, software, and processes in place, Evans Consulting has observed the following impacts:

- **Increased efficiency and time-saving.** The adoption of Unanet's solutions led to more efficient workflows that helped the company save time and money. With the implementation of Unanet ERP and CRM, Evans regained 4 days a month in analyst time, previously lost in managing spreadsheets.
- **Accurate forecasting and decision-making.** Access to real-time data and analytics enabled accurate forecasting and drove better decision-making.
- **More informed analytics painted a clearer picture.** Reports and dashboards facilitated a single view of the company's pipeline, thereby improving situational understanding. Unanet CRM keeps opportunities front of mind and helps avoid stale opportunities in the pipeline. "For me, the main goal was a visualization of the pipeline and understanding where things are, helping us to better organize ourselves," said Hodge.

Hodge's advice to others who have selected Unanet, or are looking for ERP and CRM systems? Focus on adoption within your organization to gain optimal value from the tool. "Adoption has been the key to their increased success with Unanet in recent months," said Hodge, adding, "Our goal is to be fully adopted across the entire organization." With Unanet's guidance and support, Evans has been able to increase user adoption to get even more value out of the system, with no signs of slowing down.

Using Unanet, Evans Consulting has regained control over its time, simplified its business operations, and elevated its overall services with more control over its data and pipeline visibility. Its journey began with a dedicated commitment to using a proven system that works – and you can do the same.



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