

Transforming Decision-Making and Business Growth: How Reservoir International Partnered with Unanet to Align its Business Operations

Motivation for Seeking a New ERP Solution

To capture, analyze, and leverage business and prospect data for strategic decision-making and robust business development more effectively. Reservoir International, a prominent service provider to the Department of Defense, found a pressing need to seek new enterprise resource planning (ERP) and customer relationship management (CRM) solutions to support its growth as operations expanded. The company wanted to use the power of its data to help inform programmatic decisions that supported its customers and learn from past opportunities to win more work.

With its rapidly expanding operations and increasing complexities in service delivery, the organization wanted comprehensive business solutions to streamline its processes and enhance its data analysis capabilities.

The Challenges

Operating a successful small business can often leave a few dedicated, hard-working individuals wearing many hats to ensure success. This was the case with Reservoir. Because of this, managing, storing, and leveraging data proved difficult.

As a small but growing company, Reservoir found the need to modernize and revolutionize many of its information management processes and procedures. It faced some common challenges many small businesses experience, including:

- **Find an ERP solution that could grow alongside the business.** When the company began, it started small, using Excel to manage information before moving to QuickBooks. Reservoir required a platform that was compliant with the Defense Contract Audit Agency (DCAA) and the Defense Contract Management Agency (DCMA) while also supporting the long-term goals of the organization. The company found its legacy tools inadequate to support its growth or provide comprehensive project data analysis.



Founded in 2007 by a former Special Operations soldier, Reservoir International is a Service-Disabled Veteran-Owned small business. The contract services company specializes in delivering high-quality personnel services training and education to the Department of Defense. It provides consulting and instructional services vital to National defense objectives, supporting the growth and development of those stationed both inside and outside of our borders.

Since its inception, Reservoir has conducted hundreds of training events designed to prepare its variety of clients for the realities of modern operational environments. Its staff includes a team of seasoned experts with a wide range of skills and expertise.

- **Identify a better way to maintain, track, and manage customer relationships.** Prior to implementing Unanet, Reservoir didn't have a CRM tool. They used manual processes and individual email inboxes, Excel documents, and computer desktops to house its CRM data. This proved inefficient and unreliable as a way to outline a common operating picture the entire company could refer to.
- **Equip its project leads with the data they need to track progress.** From a reporting standpoint, Reservoir needed an ERP system that could give project managers the ability to capture and analyze project data in real time.

The ERP Solution

Reservoir International found its ideal solutions in Unanet GovCon ERP and Unanet CRM, taking the following actions to overhaul its processes:

- **Establish a common operating picture everyone can access and update in real-time.** Reservoir lauded Unanet's ability to help it highlight a common operating picture that all users throughout the company could use for the real-time monitoring of opportunities. "You can take contemporaneous notes," said Eduardo Ubina, Reservoir's business development lead. "You can also ingest emails associated with an opportunity. Those two features maximize the efficiency." Reservoir also uses Unanet's Outlook integration to add contacts to deals.
- **Centrally locate its project and contract data.** From a contracting perspective, Unanet allowed Reservoir to keep its contracts and projects efficiently organized.
- **Show a more comprehensive record of past customer interactions and opportunities.** Unanet CRM offered a comprehensive legacy trail of all encounters and phases of opportunities, allowing Reservoir to delve into past wins and losses. This holistic view of their operations empowered them to refine their efforts and strategize effectively for future growth. This capability enables Reservoir to evaluate an opportunity after it has passed and why the company may have won or lost, allowing them to refine its business development processes.
- **Set up a single source of truth for company-wide terminology.** Reservoir now has a repository for its marketing and proposal assets to help maintain consistency in how it presents itself to customers or prospects. Everyone within the company has access to the same language.
- **Enhanced its ability to evaluate opportunities.** Within Unanet CRM, Reservoir utilized the bid/no-bid tool to accurately and uniformly assess opportunities throughout its pipeline.

The Approach

Implementing a new solution can feel like quite a challenge, but with the help of Unanet and a well-calculated plan, Reservoir was able to hit the ground running. Here's how they did it.

- **Transition project, contract, and customer data to one central location.** Reservoir's first move was to move all of its customer and project data to Unanet. With Unanet assisting, the implementation process was smooth and seamless. "Our favorite aspect of working with the company was on the ERP and CRM configurations," said Ryan Martin, Reservoir's contracts director. "The customer service and implementation process were great - our customer success manager was an easy partner to work with."
- **Build a process to capture data and then move forward.** With the right tools and solutions in place, Reservoir had the solutions they needed to document a repeatable, reliable process for how it could get the most value out of its data.
- **Align its data in a way that best served the business.** Reservoir uses the Shipley method, and during the implementation of Unanet CRM, Reservoir used Shipley method statuses as the framework for organizing opportunities and set its data within Unanet to be managed that way. This implementation strategy ensured a seamless transition and optimized the benefits of Unanet's solutions.
- **Encourage adoption throughout the organization.** Once put into operation, it wasn't long before Reservoir's team members saw and experienced the benefits of using Unanet. "From an adoption standpoint, our users were excited," said Martin. "Everyone saw the need for it. Everyday users loved it. We also had executive leadership who may not be in it day to day but would use the product for features like pipeline reporting."

The Impact

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- **A unified view of the company's projects and data.** Unanet offers the one-stop shop common operating picture everyone across the organization can see in real-time. That's been the biggest difference maker for Reservoir. Whether teams are working remotely or in the office, they can see updates within seconds. Reservoir International can now monitor opportunities in real time across the organization, allowing it to track new business coming in more reliably.



This offers a one-stop shop, common operating picture everyone can log into and see real-time updates to whatever effort we have going on. That's for our business development pipeline as a whole or a specific opportunity. It allows everyone to login and look at an opportunity in and see the same status.

– Eduardo Ubinas, Business Development Lead



The most powerful aspect of the tool is the fact that it is a force multiplier for us. Anyone within the company can update a specific opportunity or contact depending on how we're supporting that initiative. We can all go in and see any updates or notes.

—
Ryan Martin,
Director of Contracts

- **Enhanced insight into contracts and agreements, helping them pursue work more efficiently.** With its project and contract data and documentation properly stored and organized, Reservoir could now view and analyze its contracts and agreements (i.e., non-disclosure, teaming, etc.), more effectively. By having all of its various agreements documented and logged in one place, Reservoir had an easier time managing and reviewing these agreements as it looked to work with other companies in the market. Reservoir could gain insight into the best contracts for them to pursue with more efficiency.
- **Seamless integration of data to promote more effective collaboration across the organization.** The synergy between Unanet's ERP and CRM solutions facilitated more effective business operation and leveraged historical data to bolster business development efforts. "We've set it up so our ERP and CRM are connected," said Martin. "The information directly flows from the CRM to the ERP. That saves the team on the ERP side so they don't have to recreate the wheel. And the information flows both ways, so if there are updates on either side it reflected on the other." Now the different components of the business could communicate and collaborate on winning new business with ease.
- **Better decision-making.** The company was able to make more informed go/no-go decisions with Unanet CRM in place. "The CRM allowed us to formalize our business development and capture process," said Martin. This has allowed the company to improve its forecasting ability while reviewing lessons learned on past opportunities. The company could now use historical data to help understand why it won or lost previous opportunities, using this knowledge to inform its business development practices going forward.

With aligned ERP and CRM solutions, Reservoir is now putting its data to work for them, allowing the entire company to save time and labor. It has helped the organization build a new process-oriented, strategic approach to how it manages its current projects and wins new ones.



Where Information Means Insight

Unanet is a leading provider of ERP and CRM solutions purpose-built for government contractors and professional services. More than 3,700 project-driven organizations depend on Unanet to turn their information into actionable insights, drive better decision-making, and nurture business growth.