



#### Benefits

- A 50% increase in productivity has helped improve BTI's win rate by 15%
- BTI can compete effectively against larger players by delivering quality proposals quickly without huge cost outlays
- Internal IT costs for email traffic, data storage, and maintenance have been reduced through centralized, SaaS-based document management
- Security, risk management, knowledge management, and ISO compliance have also improved

#### Implementation Highlights

- A large number of documents and versions are managed through solicitation and RFP processes
- Templates for standard proposal workspaces and documents accelerate proposal development
- Centrally managed knowledge on past bids helps improve future performance
- Corporate data about contracts, employees, ISO standards, and project and corporate metrics is also managed in Privia

## Base Technologies Boosts Proposal Productivity and Win Rates with SpringCM



The relatively small size of Base Technologies, Inc. (BTI)—roughly 200 employees and \$40 million in annual revenue—hasn't stopped it from building a broad contract base across the federal government, including the DHS, the Labor Department, and the FAA, as well as numerous state and local entities. The success of the BTI proposal team is driven in part by its ability to tap into the company's collective expertise and lessons learned in more than 21 years of experience in the field.

This wasn't always easy. In the past, the company's proposal team struggled with outdated, inefficient tools. "Every part of the process was difficult," recalls Maryann Lesnick, V.P. of Proposals, BTI. "It was cumbersome to check out documents and version tracking was a big issue. We didn't know who had which document and couldn't tell the most recent from older versions. There was no good way to limit the ability to view, change or delete documents." Remote access was also challenging—a particular problem given the highly mobile nature of the laptop-based business development and contributor teams. As team members shared and reviewed documents via email, multiple versions accumulated on the company's servers, creating headaches for its IT department.

An ISO 9001:2000 certification process provided the occasion for a much-needed upgrade. In addition to standardizing, streamlining, and automating its processes to aid compliance with the standard, BTI took the opportunity to invest in tools to work more productively and effectively at every stage of the capture and proposal development process.

### Putting Knowledge to Work in Winning Proposals

Privia, the complete business capture and proposal management solution from SpringCM, answered BTI's need to maximize its proposal success. Consistent storage structures and document templates, managed in Privia's centralized repository, have helped Lesnick's team standardize information management and processes. Team members can now quickly find relevant information for each new opportunity using Privia's enhanced search functions. Document check-in/checkout is much simpler, while strict access control prevents unauthorized users from viewing or changing files. Multiple email attachments have been replaced by links to a single, centrally managed copy, reducing email traffic and cost and increasing security. Robust

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version control tracks document creation and editing.

BTI now uses Privia to manage its opportunity pipeline and proposal preparation process in tandem with a home-grown system for market analysis and opportunity tracking. Once the decision has been made to pursue an opportunity, the team uses a dedicated opportunity workspace in Privia to capture and manage information to support the final bid/no-bid decision. This includes RFQs, RFIs, and competitive analysis data to best practices, team member resumes, and project metrics from relevant engagements BTI has handled in the past. For opportunities that proceed to the proposal development stage, templates for standard proposal work help the team quickly assemble the full suite of proposal documents. Following each bid—both wins and losses—debrief notes are stored alongside a complete archive of proposal documentation to help the team apply lessons learned and best practices for future proposals.

Beyond proposal development, BTI has extended the value of its Privia investment by using the system to manage a broad range of corporate documents such as contracts, resumes, ISO standards practices, project and corporate metrics, and boilerplates.

## Improving Proposal Productivity and Success While Reducing Costs

“Privia helps our proposal team work more productively with fewer resources,” says Lesnick. “By making all our business information easily available and usable by our team members, the solution enables us to produce high quality, credible bids to compete effectively for large opportunities as well as to be a highly responsive player on partnership relationships.” The results are striking: “We’ve achieved a 50% improvement in productivity and a 15% improvement in our win rate,” reports Lesnick.

Privia’s Software-as-a-Service model has delivered benefits for both proposal team members and IT staff. With no client-side software to install, users can securely access the system and the information within it from any location, using any computer. “I even accessed one of my proposals from a Starbucks parking lot in the middle of the night using my laptop,” says Lesnick. With data hosted by Privia, BTI has no need to invest in, manage, or back up a new server. Requirements for bandwidth, maintenance, and support have also been reduced.

Having implemented Privia during the same time it

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pursued ISO 9001:2000 certification, BTI now uses the system to maintain and document compliance with the standard. Says Lesnick, “We’re subject to regular ISO audits to prove that we’re still following the processes that earned our certification. Privia’s tools and repository both make sure we’re doing so, and help us substantiate our compliance.” In the process, BTI is setting standards of its own for high-performance, highly successful proposal development.



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