A Government Contractor's Book of Best Practices

Adopting cloud services to drive business value and mission success.

Introduction

Government contractors are turning to secure, cloud-based services to meet customer needs and drive business value. In a fast-moving world full of uncertainty, still upended by the pandemic, there is one thing we can be certain of, and that's the need for greater digital capabilities.

By moving to the cloud, organizations free themselves from the burden of building and managing their own IT environment while standing up mission-critical features quickly and efficiently. Here, we share a collection of best practices from Trailblazers who rapidly and securely modernized their service delivery. By tapping the power of the Salesforce platform, our customers can drive revenue and exceed customer expectations as never before.

We hope that the best practices exemplified by our customers will be illustrative and insightful as you continue your own transformation journey.

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01 | SAVE TIME AND MONEY, WHILE INCREASING SECURITY BY ADOPTING A CLOUD-BASED PLATFORM.

ANAVATION

AnaVation is a government contractor that provides a variety of technology services to Federal Government Customers. In order to meet new Cybersecurity Maturity Model Certification (CMMC) security requirements without sacrificing the ability to deliver innovative services and a modern customer experience, the AnaVation team launched a CRM on the FedRAMP-authorized Salesforce Government Cloud Plus platform.

Aimee Medonos, Principal at AnaVation and Kevin Schlosser, AnaVation Information Systems Security Engineer, share five best practices from that work.

01 | ADOPT THE CLOUD.

Agile technology helps streamline processes that are otherwise left to manual or paper-based solutions. It can capture data, automate workflows, reduce the potential for error, and more. CDR Maguire took advantage of these capabilities by moving to the cloud, freeing up time and energy for its people to focus on mission-critical work.

02 | USE SALESFORCE FEDRAMP AND NIST SP 800-171 COMPLIANCE AS A BUILDING BLOCKS.

AnaVation also leveraged Salesforce's FedRAMP compliance documentation to understand the roles and responsibilities for properly configuring their instance to meet FedRAMP Moderate / High and NIST SP 800-171 requirements, giving them the building blocks to successfully position themselves for CMMC. Many of the technical necessities are the same; CMMC will just require Defense Industrial Base (DIB) companies to confirm their compliance through a third-party assessment vs. self reporting.

03 | CONFIGURE VS CUSTOMIZE.

"I could adjust workflows, create dashboards, apply feedback, and so on in a few clicks. Click-click-click, check-check done," said Schlosser. This not only saves time and energy that might otherwise be spent writing lines of code, but also makes it easier for AnaVation to keep its platform current. When new features or functionality is released, it can be pushed right through to AnaVation's Salesforce instance and carried through all dashboards and applications (much like one might update an app on their smartphone with just the tap of a screen).

04 | SCHEDULED BACKUPS AND USE THE RECYCLE BIN.

Once AnaVation configured the Salesforce environment and imported data, the team was able to regularly collaborate on company relationships with outside organizations, contacts, and opportunities. They then scheduled recurring full backups that were archived outside of Salesforce. The built-in Recycle Bin feature allows them to go back to any changes in the past two weeks to undo any accidental changes that need to be fixed.

05 | TRY NEW APPROACHES IN A SANDBOX ENVIRONMENT.

AnaVation also uses Partial Sandbox instances to try new approaches on a recent snapshot of production data. The Partial Sandbox refresh creates a snapshot of the production environment to develop and test security configurations, permissions, and new capabilities and confirm user impact ahead of time. By walking through the Sandbox in different roles, the administrators can continue to improve security and functionality while maintaining a modern user experience.
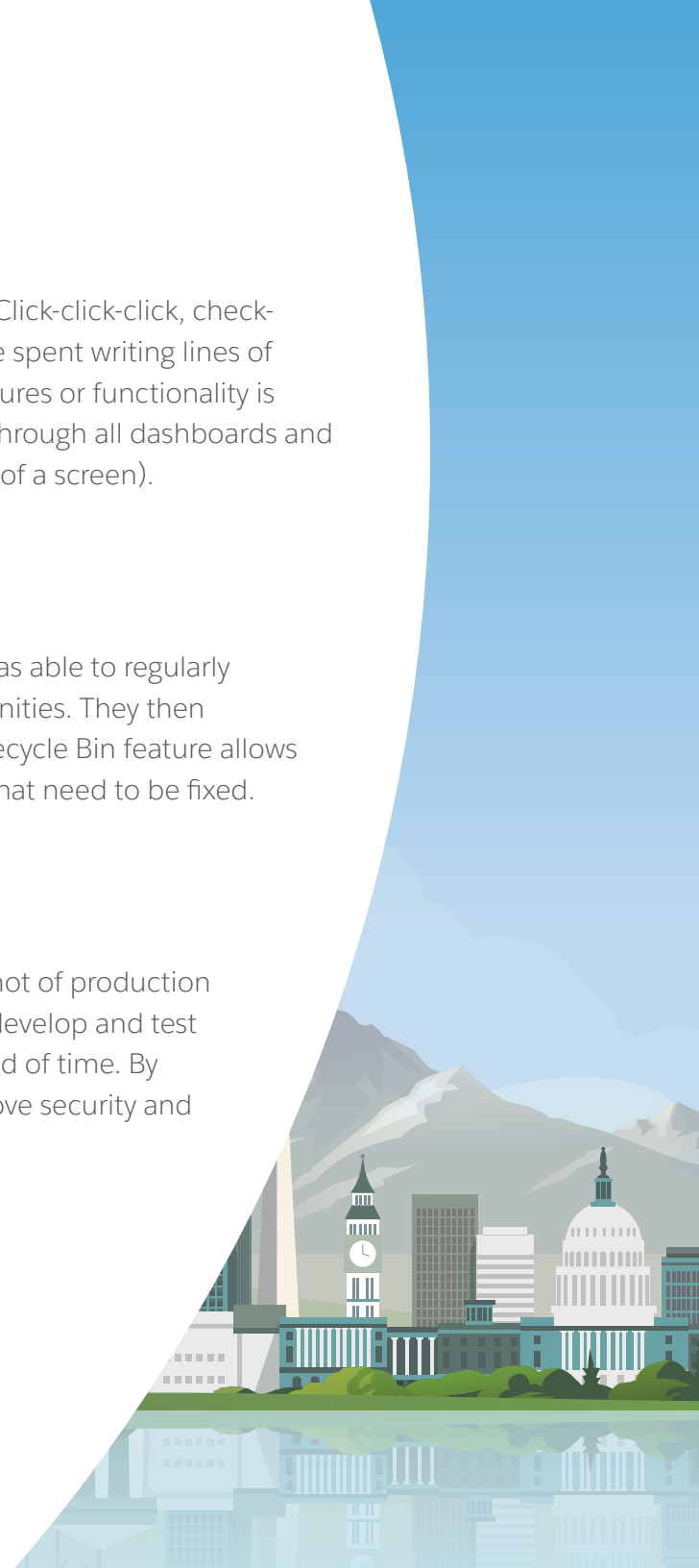
02| **EASILY LAUNCH NEW PLATFORMS ACROSS LARGE ORGANIZATIONS USING PRE-BUILT TEMPLATES.**

BAE SYSTEMS

BAE Systems Electronic Systems (ES) works on big, complex projects that require detailed input from a number of teams spread across a large organization. ES re-platformed its CRM on the FedRAMP-authorized Salesforce Government Cloud bringing everyone in the organization a single, secure system of record that helps unlocks visibility, drives data-driven activity, and reinforces a culture of collaboration.

Elizabeth Whelan, Senior Manager, Organizational Maturity at BAE ES, shares six best practices from that work.

01 | CONDUCT AN IT AUDIT.

"We had been using our old system for 10+ years and didn't know what it really looked like, we just knew it had grown through a number of custom-built applications," said Whelan.

Whelan and team began taking inventory, asking themselves questions like: What pain points are our users experiencing, what information are they able and unable to get out of the system, and why is that? That helped them flag the objects, applications, reports, and records that had become obsolete, which enabled them to move only mission-critical tools in the re-platforming effort.

02 | BE JUDICIOUS IN DEVELOPMENT.

"One item weighing constantly on my mind any time we deploy a feature that isn't standard is: Do we really need this capability in this specific fashion? There can be a tendency to say, 'I need to do X, so let's just make the system do X' and that is a very slippery slope. It can lead to over customization, which is incredibly difficult to unwind. It also leads to an expectation by users that the system will always do 'X' in the exact manner requested," said Whelan.
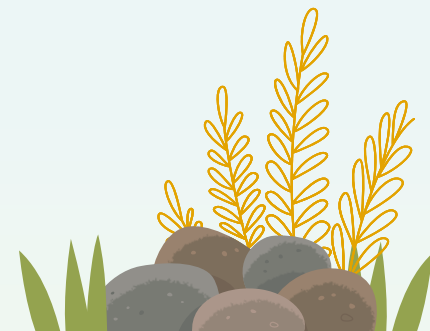
03 | CONFIGURE VS CUSTOMIZE.

"We need to use things out-of-the-box. We have a very large organization, and large organizations can tend to customize technologies to meet specific needs of the business. That can be limiting when it comes time to extend updates, share information, or upgrade the foundation entirely," said Whelan.

Configuring pre-built templates and applications, however, streamlines the maintenance process, freeing up more time, budget, and energy to focus on mission critical activities and innovation.

04 | GET A SECOND OPINION.

"Let as many people as you can safely handle have a say. This might be controversial, but it definitely helped this project," said Whelan. "We had around 20 people from different parts of the business join a group who provided their thoughts on where the current system met and failed their needs. Ensuring representation from users is critical to gaining a better understanding of how the system is working, which improvements will be most impactful, and the best ways to build in the voice of your customer."

05 | THINK BEYOND THE SPREADSHEET.

Modern-day advanced analytics tools have the ability to pull together a number of data sets, housed in a number of systems, into a single report. They then deliver that data real-time in clickable, user-friendly interfaces that allow employees to dive into the details most pertinent to their role and responsibilities. The result: More decisions made using better data.

"It also gives us back a lot of time," said Whelan. "Instead of analyzing spreadsheets, we're pulling reports, and we're all done."

06 | LAUNCH YOUR NEW PLATFORM AFTER A REGULAR BUSINESS REVIEW.

Whelan and team launched their new platform just after their quarterly business review because that's the time when people are least likely needing to do data pulls and prep work. It's also when the data is most likely up-to-date, creating a strong foundation for a successful pilot.
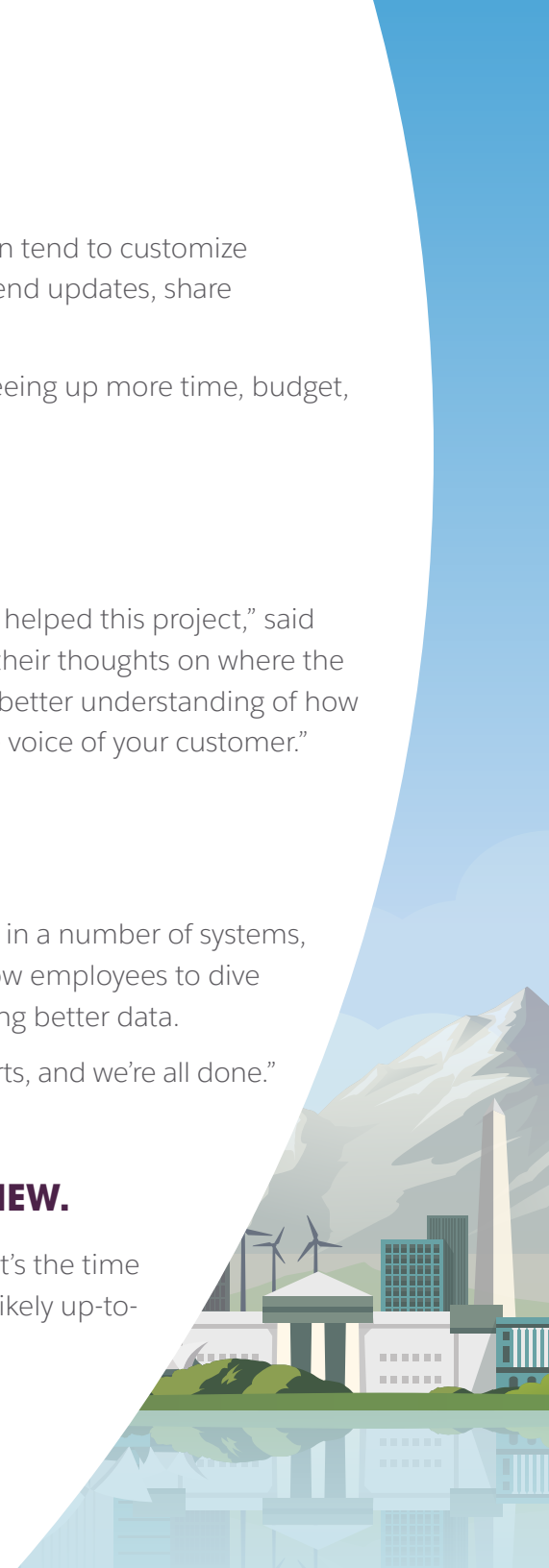
03 | HARNESS THE FLEXIBILITY OF THE CLOUD TO STAND UP NEW SYSTEMS QUICKLY, WHILE INCORPORATING CUSTOMER FEEDBACK IN REAL-TIME.

CDR MAGUIRE

CDR Maguire is a government contractor that manages over $2 billion in construction and over $10 billion in disaster recovery, making it one of the country's leading enterprise resource planning experts – largely in fast-paced emergency response scenarios.

When the company was contracted with multiple labs as well as departments and agencies across the State of Florida to build testing and processing services, at a time when much was still unknown and supplies were scarce, it launched an emergency enterprise resource planning (ERP) system on the Salesforce Customer 360 Platform for Government. It gives CDR Maguire a single platform for managing, automating, and coordinating the various business processes that come into play when responding to a crisis like COVID-19.

Tina Vidal, Executive Vice President at CDR Maguire, shares five best practices from that work.

01 | MORE IS NOT ALWAYS BETTER.

"When in a disaster scenario, it's really easy to just add people to try and solve the problem; the more people you have to support the mission, it stands to reason that things eventually get done faster. But adding more people is not always the answer – and in the case of COVID-19, not always possible. So agile technology became really a key component," said Vidal.

Technology helps streamline processes that are otherwise left to manual or paper-based solutions. It can capture data, automate workflows, reduce the potential for error, and more. CDR Maguire took advantage of these capabilities by moving to the cloud, freeing up time and energy for its people to focus on mission-critical work.

02 | BREAK IT DOWN INTO TASKS AT HAND.

"It's also really easy to get overwhelmed by the task at hand. Having the ability to step back and look at what you need to solve now, and how that is different from what might be coming next becomes critical," Vidal continued.

Instead of trying to overhaul an entire emergency response effort, CDR Maguire tackled it step-by-step. First, the team launched a portal that streamlined the intake and distribution of information in real-time. Then, the team added a call center, followed by platform-level enhancements, followed by the layering of vaccine distribution workflows. This helped the team be actionable at each step of the COVID-19 response.

03 | MAKE REFINEMENTS AS YOU GO.

"As we get feedback from customers who have interacted with our ERP, we review and apply it to our design accordingly," said Vidal. "This helps us constantly improve the user interface so that it is most helpful." This is especially important when dealing with a quickly changing scenario. Making time and space for a positive feedback loop helps make the system agile, useful, relevant, and smarter, enabling the people and processes to course correct and work more efficiently.

04 | COMMUNICATION IS KEY.

"In the middle of disasters, sometimes people just want to know that they're being heard. Even if you don't have a solution to their problem, they find comfort in knowing that you're working on it," said Vidal.

CDR Maguire prioritized how the communications process would work throughout the entirety of its emergency ERP platform.

05 | AVAILABILITY OF DATA ALLOWS FOR BETTER DECISION MAKING.

"Much of disaster response relies on a lot of people and manual paper processes, making data analysis slow and difficult and the ability to make decisions of that data hard," said Vidal. "Utilizing cloud based technology with resource reporting and data analytics tools allows stakeholders to make better decisions in response to a disaster, allowing communities to recover faster."

CDR Maguire was able to provide clients with real-time data and performance metrics, assisting in decision making on site performance, site location, and ensuring underserved community needs were being met.

04 | INVESTING IN THE RIGHT DATA TECHNOLOGY FOR YOUR COMPANY WILL PAY DIVIDENDS IN MORE WAYS THAN ONE.

ALUTIIQ

Formed in December of 1999, Alutiiq is a purpose-driven company that upholds tradition. Alutiiq provides professional services and technical solutions to the Federal government, including information technology and facility services to physical security and engineering. The company is a subsidiary of Afognak Native Corporation, an Alaska Native Corporation (ANC) wholly owned by its shareholders, who are descendants of the Indigenous people of Afognak Island.

01 | DATA IS CURRENCY: INVEST IN TECHNOLOGY TO EXTRACT VALUE.

It is essential to recognize the need to invest in new technologies, understand how a robust technical solution could simplify mission-critical processes, advance our capabilities, and position the company as an innovator when bidding in the market.

Alutiiq needed to ensure the security and stability of its data and server-based storage was not an acceptable solution because it might not be available during a power outage or in situations where employees were without server access. Therefore, to ensure there was no lost time and critical data was not compromised, the company set out to find a cloud-based solution.

02 | ADOPT A 360-DEGREE APPROACH: A SINGLE VIEW HAS MULTIPLE BENEFITS.

Alutiiq moved its bid and capture practice on to Salesforce. In doing so, they gained a CRM that enables a single view to facilitate every discussion, decision, approval, and action. The resulting 360-degree view gives the team a precise way to track opportunities, develop winning proposals, and turn it all into successful contract bids – without compromising data security.

Consider Alutiiq's primary solution criteria: simplification, capability enhancement, and differentiation. By focusing on these critical areas, the team has more readily available access to shared information, giving them enhanced collaboration capabilities and the ability to make more actionable, data-driven decisions that result in increased efficiencies.

## 03 | SHARE A SANDBOX: LEVERAGE COLLABORATION WORK TO SPEED OUTCOMES.

Alutiiq developed a technology roadmap as a guide for integration, bringing data from multiple systems together into a single platform, enabling them to automate status updates. This approach aided in standardizing and automating internal and external communications about proposals and awards and unified processes and practices across all Alutiiq subsidiaries.

The key take-away? Alutiiq has a committed group of individuals with a shared vision and end state. As this group understands the new possibilities and capabilities available on the cloud, there is more of a desire to determine how that platform can be used to support other areas of the organization to deliver on its vision and fulfill its mission.

04 | BE AGILE TO COMPETE: NAVIGATE A NON-TRADITIONAL BUSINESS ENVIRONMENT IN THE CLOUD.

As evidenced in recent headlines, such as the US Army is embracing an enterprise-as-a-service model and DHS lookings to overhaul data centers and move to the cloud, the ripple effect has inspired the larger industry to make similar moves. Coupled with recent events, such as the passage of the Modernizing Government Technology Act, the ability to be agile has never been more critical.

Faced with a market that is becoming increasingly dynamic as federal agencies are looking to become increasingly digital, Alutiiq recognized that while its business model is non-traditional, the company could better service its customers by taking an approach that sees IT as an investment in the mission instead of an investment in upkeep.
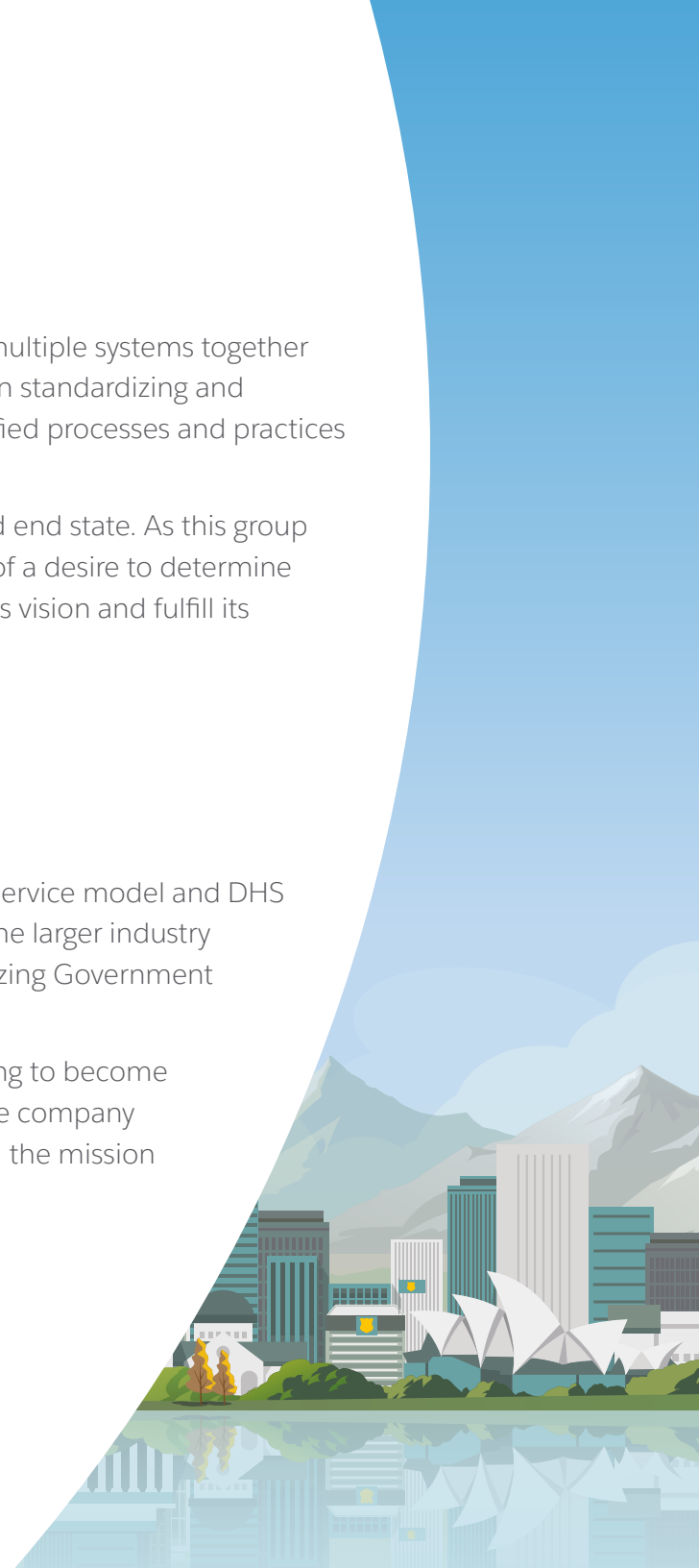
05 | CONNECT YOUR ORGANIZATION USING A DATA-DRIVEN, DIGITAL PLATFORM.

ATLANTIC DIVING SUPPLY

Atlantic Diving Supply, Inc.(ADS) is a local dive shop turned top 50 Federal Government Contractor, serving all branches of the U.S. Military, federal, state and local government organizations, law enforcement agencies, and first responders. ADS turned to the FedRAMP-authorized Salesforce Government Cloud. Starting with a CRM that IT then expanded to serve the entirety of the company, ADS empowered its technology, processes, and people to focus their efforts on the customer at the heart of the mission.

During this process, ADS demonstrated five best practices that serve as a guide for other departments and agencies looking to connect their organization in a way that focuses more resources on the mission.

01 | CUSTOMER-CENTRIC IS THE FIRST PRIORITY.

Maintaining a customer-centric perspective ensures that every plan, investment, and action is aligned to the mission – especially critical when the mission promises to provide heavily relied upon services to a highly regulated, highly differentiated group.

02 | OPEN UP YOUR PLATFORM.

"Everyone has a Salesforce license at ADS," said John Scardino, Salesforce Admin for ADS. "When you not only create the data, but also let people use the data, it empowers anyone to take care of the situation. That's a big reason why we're able to help our customers anytime, anywhere, with any question." Opening up the right level of access with the right people empowers the kind of quality service that keeps the mission relevant.

03 | FIND AN EASY-TO-USE PLATFORM.

"Our workforce is highly varied in their level of technical expertise – we have some people who were immediately comfortable with the new platform and others who had never seen anything like it." said Scardino. By deploying an easy-to-use platform, ADS unlocks the subject matter expertise from the workforce's experience in a way that makes it actionable in a modern world.

04 | TRAIN, TRAIN, TRAIN.

Being able to consolidate functions and focus on training everyone in one system, ADS fostered both adoption and automation. This leads to more use, more reliable data, and better outcomes – all while minimizing the headache and frustration that tends to come with the typical change management effort.

05 | KEEP AN APPLICATION-BASED STRATEGY IN MIND.

Designing applications with a specific function for a very particular user base helps solve the problem at hand with better system performance and a better user experience as opposed to huge monolithic systems designed to do everything and be anything to everyone. This targeted approach reduces complexity, which leads to better adoption of that particular functionality. Being able to rapidly design, develop, and deploy these micro-apps within a few days' time, rather than weeks or months, creates a more agile and successful organization capable of adapting to changing needs. The key is developing a strategy of how those individual apps connect with one another, and choosing the right platform to easily facilitate the pushing and pulling of enterprise data between them.

salesforce

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visit: **salesforce.com/government**
or call **844-807-8829**
to speak to a government expert.