

Sierra7 makes service simple with Unanet's ERP and CRM solutions

Motivation to Find New ERP and CRM Solutions

Sierra7 is a leading federal service provider with a powerful motto: "Serve Those Who Serve." According to Chief Financial Officer (CFO) Frank Rendon, it's more than a slogan. "We really believe in that," said Rendon. "I'm a veteran myself, and our CEO is a veteran." As the company provided its stellar support to the Department of Veterans Affairs (VA) as well as other government health agencies, it found itself in dire need of a comprehensive, integrated solution to manage their business operations.

Recognizing the need to simplify workflows, improve data accessibility, and enhance decision-making capabilities, Sierra7 initiated the search for ERP and CRM solutions that could effectively address these requirements. This ultimately led them to a partnership with Unanet that enhanced visibility into how the business was performing, automated previously manual processes, offered real-time access to financial data, and saved them a significant amount of time and money.

The Challenges

Sierra7's hurdles were primarily due to the limitations of their existing systems, which had been impeding their operational efficiency and growth prospects. Those challenges included:

- **Sierra7 was operating on two distinct accounting systems.** This resulted from an acquisition, and it posed great challenges in unifying financial data effectively. "We needed a system that would bring the two accounting systems together," said Rendon.
- **A requirement for real-time financial insights and project management capabilities.** With the growth and complexity of operation, standard spreadsheets couldn't provide the sophistication they needed.
- **Overly manual processes.** Running reports from different systems and managing projects in spreadsheets was costly in terms of time and efficiency.
- **Identify a unified, compatible CRM solution.** Sierra7 used Microsoft Dynamic for its CRM needs. It needed a CRM tool that could "talk to" its ERP, becoming fully integrated to capture the company's pipeline.

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Sierra7 is a veteran-owned government contracting company with a mission to "Serve Those Who Serve" through the delivery of innovative healthcare, technology, and consulting solutions to help their clients meet their missions.

The Solution

In their search for the perfect fit for their ERP and CRM needs, Sierra7 discovered Unanet's software solutions.

- **Deployment of Unanet's ERP system.** To address their operational needs, Sierra7 first incorporated Unanet's ERP system, integrating their diverse accounting systems and improving project management capabilities. The company did this first with its Finance department, ensuring it had accurate data in place. "The blast phase was making sure we brought the right data over and did a really good data cleanse," said Rendon. "Finance really took charge of that and had a clean data transfer."
- **Adoption of Unanet's CRM tool.** This allowed Sierra7 to effectively track their pipeline, capture customer relation data, and integrate with the ERP system. "We wanted a tool to be able to talk with our ERP system, having an integrated type of solution to specifically capture our pipeline," said Rendon.
- **Customized CRM fields and Outlook add-in.** These adjustments allowed for easier access and compatibility with Sierra7's existing systems. "We're now exclusively just training our growth team using that Outlook feature," said Rendon. "We can tell them, 'You don't even have to go into the CRM - you can just use Outlook to find your data.'"

The Approach

The implementation of Unanet's ERP and CRM software required careful planning and execution. Here is how they tackled it:

- **Evaluate multiple systems.** Sierra7 went through a thorough process, evaluating three different systems. They ultimately chose Unanet for possessing the right feature set.
- **Plan the transition.** This involved understanding their unique operational needs, aligning them with the capabilities of Unanet's solutions, and conducting a phased roll-out to minimize disruption.
- **Swift implementation of Unanet's ERP system.** The decision was made in October 2020, and by January 2021, the ERP system was fully functioning.
- **Effective CRM implementation.** A year after the ERP system implementation, Sierra7 repeated the process to complete the CRM roll-out, once again proving their dedication to installing fast, efficient solutions. Sierra7 worked with Unanet support to ensure the fields within Unanet CRM matched the fields it had previously set up in its old solution. The company also collaborated closely with Unanet to ensure it brought the right data over, with its Finance team leading the charge in conjunction with Unanet.



Once we implemented Unanet GovCon ERP, we could establish our contribution margin, establish goals and we were seeing indirect costs on a real-time basis. We were starting to see net profit and net margin instantaneously month to month – real-time information.

– Frank Rendon, CFO, Sierra7

The Impact

The company boosted its efficiency, clarified and streamlined its processes, and enhanced decision-making capabilities as a result of implementing Unanet's software. Teaming with Unanet's solutions delivered:

- **Enhanced visibility and real-time insights.** Unanet provided Sierra7 with a centralized ERP platform for project management, financials, and resource planning, leading to heightened visibility into the company's operations. For its CRM, Sierra7 had significantly increased visibility into its opportunity pipeline.
- **Automated processes and improved efficiency.** With Unanet's software solutions and their ability to be automated, Sierra7 saw significant reductions in manual tasks. This freed its team members to focus on strategy over operations.
- **Substantial time savings.** With Unanet, Sierra7 integrated its ERP and CRM solutions, eliminating the need for multiple systems. The company took its project management out of spreadsheets.
- **Instant access to real-time financial information.** This helped track net profit, net margin, and make real-time adjustments to rates, improving the company's overall financial management.
- **Cost-effective operations.** By eliminating the need for two different accounting systems and third-party providers for certain reports, they were able to save money with a single solution.
- **Take advantage of Unanet's Outlook integration.** Sierra7 used Unanet's Outlook integration, allowing its teams to pull up vital contact data and details directly in Outlook without having to go into a CRM.

Sierra7 was committed to delivering excellent service, which demanded efficient, reliable systems on the backend. It needed easy-to-use, practical software solutions that could provide results in the present while accommodating the company's future growth. "Being able to scale is huge and having both systems in place is really going to help us," said Rendon.

With Unanet supporting the mission, Sierra7 is now in a much better position to fulfill its ultimate mission of serving those who serve at a much larger scale.



Unanet is a leading provider of project-based ERP and CRM solutions purpose-built for government contractors, architecture, engineering, construction, and professional services. More than 3,700 project-driven organizations depend on Unanet to turn their information into actionable insights, drive better decision-making, maintain regulatory compliance, and accelerate business growth. All backed by a people-centered team invested in the success of your projects, people, and financials. For more information or a visitation, visit www.unanet.com.