

Case Study

Take2 Achieves Improved Visibility, Efficiency, and Agility with Help from TechnoMile

take |  **TECHNOMILE**

Headquarters
Vienna, VA



Founded
2015



Company Size
1,000+



Industry
IT Staffing & Consulting



In 2015, Take2 was founded on a simple idea: IT staffing needed another take. Federal agencies and businesses were struggling to keep pace with evolving technology, shifting economies, and growing demand for specialized talent. The company saw the need for a faster, smarter, people-first approach, so Take2 built its People Cloud, a cultivated, proprietary database of over 120,000 vetted candidates, giving the company an unmatched ability to quickly fill critical roles and help organizations stay fully staffed, capable, and ready for what's next. Today, Take2 is one of the nation's fastest-growing IT staffing and consulting firms. Headquartered in Vienna, Virginia, Take2's federal business focuses primarily on partnering with the major system integrators, supporting their efforts across civilian, intelligence, and defense agencies.

Like many growing GovCon companies, Take2 found itself hungry for improved visibility and insights into its pipeline and business performance but hamstrung by data sitting in disparate systems and technology that was ill-equipped to handle the unique complexities of federal sales. Jeri Maynard, Managing Director of BD Operations at Take2, explains, "We had federal pipeline data in Excel. We also had opportunity data in a system called Bullhorn but many fields that we need to track federal work appropriately were missing. Information was scattered and incomplete and producing accurate reporting was extremely manual and time consuming."

Seeking Improved Visibility and Efficiency

In October of 2023, Take2 began its search for a CRM system aligned to the needs of a thriving GovCon business. Beyond robust reporting and dashboard capabilities, Take2's buying criteria focused on flexibility to support unique sales processes for the company's varied opportunity types, integration capabilities – especially with federal opportunity intelligence platforms, ease of use, and a potential solution's AI capabilities and roadmap. Says Maynard, "We didn't have the right tools to deliver timely, quality information to leadership and to our Board on the health and status of our pipeline, so we needed a way to tie everything together and introduce automation. It's also high on our executives' list to understand how our operations departments can incorporate AI to help us stay lean and efficient."



A Focus on Future Growth

Take2 has a mature process to support internal technology selections that's driven by its Project Management Office (PMO). Maynard and her team worked with the PMO to create a project charter, document their CRM solution requirements, and develop a short list of solutions to consider. Based on an initial round of product demos, the evaluation team narrowed the field to TechnoMile, Capture2Proposal, and OneTeam. After considering these vendors' product demos, pricing, and client references, Take2 stack-ranked these prospective solutions based on how well they each addressed the company's requirements and presented this analysis and made a solution recommendation to the company's executive team.

Shares Maynard, "Beyond product capabilities, a big part of what we evaluated was whether these tools had clients of a similar size as Take2 and, from a scalability standpoint, whether larger companies were using them as well. In addition, the AI roadmap continues to be an important factor for all our tool purchases."

Looking Beyond Right Now



Ultimately, Take2 selected TechnoMile's Growth CRM, a CRM solution that's purpose-built for selling to the federal government. It's deployed on top of Salesforce or Microsoft Dynamics, layering on unique features and capabilities required by government contractors. In particular, Growth CRM outshone the competition with the strength of its reporting capabilities, intuitive user experience, integrations, configurability, and scalability. Says Jessica Wilson, BD Operations Lead at Take2, "We're not just 'right-now' thinkers. We put thought into the future state of how we might use our new CRM. We saw so many different ways that we could expand and scale with TechnoMile's tool, which helped make it the front runner."

A Tailored Solution

Growth CRM's flexibility and the ease with which the solution can be tailored to Take2's unique business needs were central to the company's decision to partner with TechnoMile. Explains Wilson, "We've created different opportunity record types in the system that represent the different ways that we pursue work – as a subcontractor or a prime and the different avenues associated with the prime integrators. From there we can customize how we handle specific business processes for each record type. Currently it's primarily for reporting and revenue projections but down the road we want to expand this to Pwin, the opportunity scorecard, and more."

Data-Driven Decision Making

For Take2, the ease of creating reports and data visualizations from Growth that can be used to help guide decision making has been game changing. Says Maynard, "Our leadership team likes to see data sliced in a variety of ways, so it was critical to have a tool like Growth that makes it easy to produce whatever view they might want. And it's taken our ability to make strategic decisions based on data to the next level. As an example, something we're excited to report on is the overall health of our portfolio. Since the majority of our work is subcontracting, we can see who we're teaming with, in which agencies, and in what areas. We can clearly see where we're having the most success and where we might need to diversify. It's been really exciting to be able to show that historical data and how well we've done throughout the year."

Staying Lean Through Efficiency Improvements

To date, Take2's efficiency improvements with its Growth CRM have been driven by the tool's powerful, user-friendly reporting capabilities and automation in areas like report distribution – which happens on a very specific cadence – and automated opportunity updates driven by Growth's integration with GovWin IQ. Shares Wilson, "Part of our PMO process is looking at the ROI of the new tool after 90 days – the hours it takes to do specific tasks or create reports before and after the tool's implementation. The time savings with TechnoMile came to approximately 63.75 hours a month." Adds Maynard, "Reports are just so much easier to generate and distribute now. As a result, we've been able to keep our team super lean – the capabilities probably replace the need for a full-time employee, if not more."

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– Jessica Wilson, BD Operations Lead, Take2

Strengthened Transparency and Accountability



Since implementing Growth, Take2 has also experienced a new level of transparency and accountability regarding its pipeline. Explains Maynard, "We have pipeline meetings where we screenshare our Growth CRM, which elevates the level of transparency and visibility into each BD individual's pipeline. It's created a new level of accountability from week to week. Beyond that, seeing how our pipeline numbers are evolving month-over-month. In a year like this that's been completely unpredictable because of DOGE, these value-adds have been tremendous."

Transforming Communication

Improved communication and collaboration are additional areas where Take2 has seen its TechnoMile solution add value. Says Wilson, “We’re seeing more collaborative, data-driven decision making, especially with our qualification processes. Let’s say we have 3 people chasing an opportunity with 3 different integrators. Having Growth is getting people in the same room earlier and using the data to inform which is the best partner to go with.” Adds Maynard, “Having Growth has also illuminated where there were some gaps in interdepartmental communication. We want to keep the data really healthy in our pipeline and that’s prompting better communication. The system makes it so easy to see things like whether we have an NDA or teaming agreement in place for a deal or even deduplicating pursuits entered by different BD team members. These simple things have been transformative.”

Managing Risk in Turbulent Times

One benefit of its Growth CRM investment that Take2 couldn’t anticipate was how it’s equipped the company to understand pipeline risk and improve its agility in the wake of changes introduced by the Trump administration and its DOGE initiative. Explains Maynard, “We were able to quickly add new fields in Growth that allow us to track and analyze DOGE-related risk in our pipeline – both looking at the agency and the primary requirements associated with our pursuits. We created a related dashboard report that we now publish every week so that we understand our positions, what our risk levels are, and whether Take2’s pursuits are focused where the money is going.”

Expanding upon a Strong Foundation

Looking forward, the Take2 team plans to build upon the strong foundation they’ve laid that enables their Growth CRM to support tailored workflows and business processes based on each opportunity record type. They’re also interested in exploring how other areas of Take2’s business might leverage their TechnoMile investment. Says Wilson, “We want to work on tailoring the Pwin calculator and see how we can streamline and refine the workflows in our BD processes within Growth. Plus, with the system’s flexibility, there’s potential to leverage it for Take2’s commercial opportunities as well. If there’s a step in a process or a department that we could potentially onboard to TechnoMile, we’ll probably try.” Adds Maynard, “We’re just at the beginning and there’s so much opportunity – it’s exciting! For a smaller-sized business, with TechnoMile you can do so much with so few staff – it’s a true value add.”

About TechnoMile

From go-to-market to contract closeout, TechnoMile provides transformative, AI-enabled cloud solutions that empower companies to find, pursue, win, and retain more business with the government. With our best-in-class cloud platform, companies optimize BD and capture processes, gain unique competitive insights, source contact intelligence, automate and de-risk the contract lifecycle, and gain an information advantage that elevates enterprise performance.

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