

CLIENT



Capital
Reserve
Consultants



The Client

Miller+Dodson Associates, Inc. is a national leader in Reserve Studies, the detailed reports that recommend how much in capital reserves is necessary to maintain community association facilities and amenities. The company serves a wide and diverse clientele, from condominium and homeowner associations to resorts, country clubs, golf courses, religious and educational facilities throughout the U.S. and abroad.

The Challenge

For more than 10 years, the company had relied on ACT software to manage its customer database. Early versions of the program did little more than store contact information, with no ability to streamline processes or manage company relationships and interactions. The company also had relied on Lotus 1-2-3 and Microsoft Office to produce its reports, which did not offer the necessary efficiencies needed to stay competitive, despite the superiority of Miller Dodson's comprehensive reports. Relying on a system built on multiple software platforms meant that Miller+Dodson spent inordinate amounts of time duplicating and validating data, repeatedly preparing sections of each report, and performing quality assurance through their process.

The Solution

The Summit Miller+Dodson team thoroughly examined the existing systems to determine what worked and what didn't with the goal of streamlining the entire process – from responding to RFPs and proposal preparation, customer relationship management (CRM), lead generation and sales, to report creation and delivery.

The finished software product is a unified system designed specifically to handle the customized processes in use by Miller+Dodson.

The internal-facing software - now completely connected to the customer request form - leverages a fully-customized CRM system that effectively handles opportunities, proposals, onsite work, analyses, report generation, and revisions.

The Results

The custom software has enabled the company to save several hours on each proposal and better serve its customers. With hundreds of proposals a year, the long-term cost savings far outweigh the cost of development and allow Miller+Dodson to retain its position as a national leader in Reserve Studies.

Summit Business Technologies

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Summit Business Technologies enables businesses to succeed by managing and securing their IT infrastructure. Summit partners with organizations throughout MD, DC, and VA as specialists in the areas of Cybersecurity, Compliance, and Managed IT Services.

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