



Client Success Stories

Sales Increase, Process, Operations Improvement, Cost Savings Success Stories

Client Name
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(3.40) **\$7.6 million cost savings and profit gain over 5 years for cost of \$200,000. (Estimated with client.)**

Entertainment Industry Salesforce Contract Lifecycle Management Project QUOTE FROM LEAD ATTORNEY :

"We stumbled along... did not use the documentation approach you are using... nothing written down... this is going so much better... we've gotten the same work done in 10 weeks that took two years last time."

Difficult Project, Case Study in Process

[Click for Details](#)

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(3.38) **Created Option to Reduce "Time to User Value" from 5 Months to 30 Days for Fixed Price \$1 Million Salesforce Service Cloud Project. Architecture, Requirements, User Stories, Road Map and No-Code Solution Delivered in 10 Weeks for Financial Services Client.**

- **640 Requirements consolidated to 284 User Stories**
 - **304 Requirements deferred, out of scope or users able to self-serve**
 - **Architecture, ERD Defined with 38 Standard and 7 Custom Salesforce Objects, including Requirement Traceability**
 - **Nine Integrations Defined**
 - **45 Record Types Defined**
 - **Gap Analysis, Training Sessions and Videos for Users.**
- HIGHEST VALUE DELIVERABLES**
- **To-Be Process Flow Defined for 1500 Clients after 20 Requirements Workshops**
 - **Road Map**
 - **Detailed Implementation Plan**
 - **ERD**

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(3.39) **Excesses of Big Tech Company On Display – Collapsing. Personally witnessing the fall of a "grow-grow-grow tech-hype-arrogant" \$1 billion company bought by private equity firm (who significantly overpaid.)**

[Confidential Details](#)

Lessons learned TBD. Currently participating in outsourcing and layoff of thousands of employees. Initial thoughts:

- **"We only sell contracts". Entire focus seems to be not selling one-offs – designing the business for repeat sales Good!!!?**

- Band-Aids in baling wire problem in spades. **CANNOT AFFORD HIGH COST OF SALESFORCE SOLUTIONS**

- Rapid no code solutions left undocumented, techies gone wild, sophisticated stuff – but not economic. The business cannot continue - likely to be cut in half.

- Frankenapp x 600! **The Dark side of no-code solutions**

- **Former CEO and Director lawsuits making things worse**

- **Star, cash cow,?, Dog triage will be forced by the financial guys if company doesn't do it first. BIG QUESTION: WHAT BUSINESS UNITS, PRODUCT LINES KEEP vs**

DIVEST or SHUT DOWN???

*DOING TRIAGE EARLY, BEFORE FORCED PRODUCES 10X BETTER RESULTS!!!? (per valued Colleague Pete S. has had numerous engagements where triage was too late, contaminated by politics, favoritism)

*KEEP THOSE THAT CAN RAISE PRICES, EARN ABOVE INDUSTRY AVERAGE MARGIN

*SEVERAL BUSINESSES RAZOR THIN MARGINS, CANNOT RAISE. Will have to go.

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(3.37) **\$8.7 Million Salesforce Project Results in Cost Savings of \$9.8 Million and Gross Profit of \$216 Million Expected Over Five Years**

Fixed Price Project - Lessons Learned, What We Might Have Done Better

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(3.36) **Crash / Rapid Implementation of \$3.5 Million Salesforce CRM for Fortune 50 Manufacturer. 150 User Stories Defined, Entered into TFS for Agile Management, Six Sprints, 24 Contractors On-boarded, 5 Scrum Teams Set Up, Complex Integration Architecture Defined in Four Months***

UPDATE FROM PROJECT TEAM MEMBER 8/4/2020 SHOWING SCOPE AND TIME PROMISED, SCOPE IMPLEMENTED

Full Case Details

Project Tools, Work Product

Goals, Priorities, Guidance

Agile / Scrum Of Scrums / Scrum Master / Project Management / Work Management

Objects Developed, Customized, Tested

Scope Management, Burn Up Chart

- Bad Example

- GOOD EXAMPLE: Burn Up Chart Showing Scope, Budget / Plan / Actual Completed User Stories, Extreme Scope Creep

Process Mapping, Consolidation, Integration (Not done, devastating to project)

User Stories, Use Cases, Requirements, Estimating, Acceptance Testing

Development, Design

Integration, Interfaces, Data Migration

Release Management

Security (Profiles, Roles, Permission Sets, Sharing Rules)

Project Team Ramp Up, Guidance

Top 10 Project Problems, Escalations, Most Likely Outcome

Client Scorecard Showing Probability of Project Success

Detailed Payback Analysis

Click for Full Details Technical Case, Confidential

Detailed Analysis of Users Stories, Sprints, Estimate, Actual Cost, Payback per User Story

NOTE: This project did not proceed as expected. Case re-write is in process*.

BIG OUTCOMES, GOALS:

1. **"Every Customer Service Contact is an Opportunity to SELL"**
2. **360 Degree View of Customer for BETTER SERVICE, Happy Customers BUY MORE**
3. **Earn Higher Margins In a Commodity Business**
4. **On-Time Response To Customer Requests Enforced: Service Level Agreements**
5. **Hot Leads: Optimizing The Process:**
6. **Grow Direct Sales at Higher Margins**
7. **Skill Based Routing, Optimized Routing of Phone, Chat, Web Form and Email Cases**
8. **Lead Qualification: Web Site / Trade Show / Email / Text Campaigns become qualified, prioritized leads**
9. **"Meet Competitive Price" Request: For distributors and internal sales people**
10. **Warm Hand-off of Leads to Distributors:**
11. **Stop Time Waste: Reduce Complex, Repetitive Email Tasks.**
12. **Close Ratio Improvement**
13. **Stop Working Old Leads, Reach Out, Generate More and Better Leads**
14. **Configure, Price, Quote, Estimates Proposals**
15. **Other Items Worked On By Other Teams, Other Clients**

HOW TO: WEB SITE CATALOG, ECOMMERCE, BIG STEPS TO GET TO GOALS

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(3.32) **How We Identified \$2.5 Million in EBITDA Improvement and made a FAST START on Capturing How To Take Out 1/3 of Business Unit Labor Costs and 1/3 of IT System and Labor Costs. The Ballad Of Max, Anatomy of Big Migration (see page 22 of full case). PRIMARY WORK SAMPLES:**

(3.33) **Big SharePoint Nightmare - How To Avoid 1700 Site Collections, 12 Servers, 4 Million Records, 17 TB of Data Unstable, Servers Dying, Search Not Working for 1/3 of all Sites, Hundreds of User Help Requests - No Way to Respond, A New Fire Every Other Day Irrational Cheapness has Big Consequences, \$100,000+ of Revenue at Extreme Risk, Not Competitive with Alternatives**

- Click for Architecture

- Click for 1700 Site Collection List

- Captain's Log - What Went Wrong, Lessons, Prevention

(3.35) **Vista Machining: CRM and Operations Processes Mapped, Optimized in 60 Days.** Included sales leads, sales activity tracking, RFQ to close tracking, P.O. to ship procurement tracking workflow developed in 90 days for minimal cost. **Key to adoption was "5 clicks or less to do anything. Best of the Best Sales Self-Management System**

- Process Map - AFTER

- Sales Person Buy In Record Keeping 5 Clicks or Less Per Contact

- [Click for full case study](#), password required
- Full Architecture, Migration Map [PDF](#)
- [Kanban Board Showing Work, Payback](#)
- [Full Case Study Details](#)

Part 1: Underlying Strategy, Margins, Balance Sheet and Acquisition Problems Compromise the Results

Part 2: "Why Can't We Run The Business On Excel?"

Part 3: Project Management Tools, Costs, Options, Effectiveness. Dramatic Improvements in 60 Days

Part 4: "Hygiene", Must Do, Hard, Necessary, Lower Value Work



(3.30) **Golden Spread Electric COOP Company Deploys SharePoint for Dozens of HR, Employee Applications, Compliance, Construction Projects, Legal, Admin, Field Operations***

- [Case Study with Bowling Alley of No-Code Solutions](#) (password required)
 - [HR Applications, Employee Portal](#) (password required)
 - [Agile Project Management Tools, Ran Two Projects Over \\$1 Million](#) (password required)
 - [Public Website Project](#) (See [www.gsec.coop](#) password required)
 - [Confidential Board Member Website Project](#) Dashboard showing real time electricity generation at 8 generation facilities (password required)
 - [Board Member Dashboard, Critical Operations, Website Project](#) (password required)
 - [Screen flow defining Critical Operations Dashboard](#) (password required)
 - [Responsive Design for Tablet, Phone, Desktop](#) (password required)
 - [Azure Configuration Drawing](#)
 - [Azure Configuration Details](#)
 - [SharePoint Project Management Tools, Class 1, Task List + Document Library, COMPLIANCE EXAMPLE](#) (password required)
 - [SharePoint Project Management Tools, Class 2, MS Project integrated with Task List](#) (password required)
 - [Project Online PWA Strengths Weaknesses](#)
 - [Legal Service Request](#) (password required)
 - [Use Cases, Extensive, HR, Legal, Compliance, Admin](#) (Word document and SEE AGILE + SharePoint List, Video password required)
 - [Agile Tool Connected to SharePoint List for Details, Disciplined Use Case, Requirements Tracking through Test and Sign-off](#) (password required)
 - [SharePoint Site Map](#) (password required)
 - [Timesheet System with Project Costing](#) (password required)
- Header add later:
- [Field Asset Inventory Maintenance Process Video 1 Online Video 2, Offline Synch](#)
 - [Vehicle Fleet Maintenance, Check In, Check Out](#)
 - [Admin Service Request](#)
 - [Nintex Workflow Leave Request Approval, Good](#)
 - [Nintex Workflow Send Daily News Email, Poor](#)



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(3.33) **Private Equity Client, Difficult Situation, \$500,000+ to bring two acquired companies to stable, competitive technology but business profits and EBITDA multiple at sale cannot justify the investment. "Technical Debt" Identified before acquisition***

- (Case study in process)
- Before and After Architecture Map [CLICK](#)
- Earned Value Project Accounting and Management Shows Trouble - probably cannot be resolved [EV Report](#)
- Project Budget [Full EV Spreadsheet with Budget](#)
- TECHNICAL DEBT:: For decades both acquired companies spent well less than 1/2 of 1% of revenues on IT. PE firm is now burdened with making the investment (should be 3% of revenues per year).
- SQL Server Database Directly Synced to SharePoint, Allows Users to Create Dashboards and All Complex Applications without consultant or IT. Datasynch Studio [Video](#) See also screens in Telecom Manufacturer case Part 3, Item 3a
- [SQL Server Integration Services video](#) showing import and clean up of order files using Visual Studio Data Tools
- Our design would have kept \$4 million of orders per year profitable but the approach taken puts this revenue at extreme risk.
- Over half of IT labor budget spent on fixes, patches, work-arounds - just maintaining the old systems.
- Internal person with extremely limited experience convinces bosses he can do the project internally for less

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(3.28) **Accounts Payable Success Story: 10,000 Printed Pages Saved Per Month, \$250,000 Labor Savings per Year (CASE STUDY IN PROCESS)***

- [Click Here for accounts payable FLOWCHART case study](#) (redacted, password required)

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(3.27) **Custom Web Site for Wholesale, Retail, Services Business Under \$10,000 instead of \$500,000+*** (most items redacted, password required)

- [SharePoint 2013 Architecture, Hierarchy Implemented](#)
- [Jumpstart Workshop Report Designing Website with SharePoint, DW, Other Tools](#) (redacted, password required) (URL is in Muse, but link will not work in webpage)
- [SharePoint Architecture Documentation Makes Tech Problems Easier](#) (password required) (URL is in Muse, but link will not work in webpage)
- [Bowling Alley of Wholesale Solutions Newsletter 48](#)

- [0/1 Sales Rep Self-Management System, Best of Best](#)
- [Visual Order Service Tracking My Action Items](#)

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(3.34) **CEO Dashboard in Place in 10 Days. Migration / Consolidation of Multiple On Premise Systems Mapped to SharePoint Online / Azure***

- [Architecture Map Showing Before and After](#) (redacted, password required)
- [CEO Dashboard, V1, V2, V3](#) - the PAYOFF - 1 click to see the most critical indicator for the business

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(3.31) **Wholesale Distribution Success Stories* SharePoint, Related Microsoft Technologies and Process Simplification Result in Sales Gains and Cost Savings. Sales Pipeline System Resulted in \$6.5 Million Sold in 30 Sales over 30 Months and Penetrated New Marquee Account:**

- \$5.5 Million Sale to Procter & Gamble. Complex Pricing and Quoting System Reengineered Resulting in \$2.5 Million per Year Savings. 70 Customer Web Sites Built Allowing Self-Service Resulting in \$10 Million per Year Sales Gain. Order Processing Reduced from 5 Days to 1½ Days**
- 1.3 Million Credit and Collections Pages to Become Paperless for Wholesale Distribution Company Resulting in \$500,000 Labor Savings Over 5 Years**
- [Bowling Alley of Solutions Newsletter 48](#)

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(3.29) **Customizing SharePoint for 25 Person Company Creates Nightmare, \$100,000+ of Lost Work, Starting Over***

(3.26) **Credit Collections Paperless Success**
Story: \$500,000 Savings from \$100,000 Investment.
1.3 Million Pages Made Paperless*

- [Click Here for credit and collections case study with FLOWCHART](#) (redacted, password required)
- [Click Here for Use Cases, Test Scripts, Content Type Specifications](#) (redacted, password required)
- [Click Here for Video Of Full Solution](#) (See work management queue at beginning, redacted, password required)
- [Executive Dashboard All Credit Collection Status](#) (See All Dashboards at 16:20 redacted, password required)
- [Executive Dashboard Action Item, Requirements Tracking, Bugging Email](#) (See Dashboards at beginning, Bugging Emails at 4:45 redacted, password required)
- [1 Page Executive Outcomes, Process, Architecture](#) after MULTIPLE SESSIONS (requires password)

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(3.23) **Engineered to Order Pump Manufacturer: Non-Conforming Materials / Quality Problem: Extremely complex manual processes, mapped As-Is, designed To-Be, workflow and advanced SharePoint application developed within 60 days. 81 Step Process Reduced to 46 Steps. 100+ No-Code Applications and Solutions Identified for Engineered to Order Manufacturers.***

- [Full Case Study](#)
- [Bowling Alley of No-Code Solutions](#) - pg 2 of case
- [BEFORE process map](#)
- [AFTER process map](#)
- [Electronic Form](#)
- [Executive Dashboard Visual Quality Problem Tracking](#)
- [Quality Problem Extensive Use Cases](#)
- [Quick Hit Process Improvements](#) - pg 5 of case
- [New Product Development Pipeline Quickstart](#) ***
- [Dealer Reseller Customer Portal Quickstart](#) ***
- [Purchasing Vendor Portal Quickstart](#) ***
- [32 Standard Bottlenecks for Engineered to Order Manufacturers](#)



(3.21) **Grote Consulting***: Software Specification and Bid Package After Multiple Failures by Previous Vendors for Consulting Services Firm
- [Bid Package Complete LMN Company](#)



(3.17) **Hyundai***:
- [SharePoint Requirements Document Sample, CLICK HERE](#)
- [SharePoint Governance Checklist CLICK HERE](#)
- [Information Architecture Taxonomy Work Plan](#)
- [Information Architecture Schedule Timeline](#)
- [10 to 1 Project Payback Examples](#)

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(3.24) **Mortgage Company, Home Builder Heavy Construction Case***: SharePoint Preparation and Diligence Over Three Difficult Years Results in \$2.75 Million of Cost Savings and Operations Improvements Identified. **93 Projects Identified, 80% Can Be Completed With No-Code Solutions and Process Improvement.** (All items below require password)

- [Full Case Study](#)
- [Personnel Action Form and Workflow Automated in 20 Hours](#) ***
- [Land Acquisition Process for Approving \\$10 Million+ Deals](#)
- [Roadmap to \\$2.75 Million Per Year in Savings and Operations Improvements](#)
- [SharePoint Navigation, Search, Design, Challenges with Circular Architecture](#) (See SharePoint Working Docs)
- [Getting User Acceptance: Why Use Libraries, Metadata and Views Instead of Folders](#) (See SharePoint Working Docs)
- [SharePoint 2013 Features, Benefits, Cautions, Migration Decision](#) (See SharePoint Working Docs)
- [Advanced Project Management with SharePoint](#)
- [5 Pillars of SharePoint Strategy, Full Detail Report](#)



(3.22) **Federal Express***:
- [Full detail bid package for major system](#)



(3.20) **Nortel***: Simple, Fast Development, Scope and Cost Controlled through Screen Flows and User Sign-Offs for Nortel.
- [Screen Flow Change Control Simple With Sign Off](#)
- [Earned Value Training Materials](#)
- [Simple Project Plan Testing Too Low](#)

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(3.19) **Trade Show Services Provider***: Process Map and RFP for services estimating, project planning, quoting, sourcing, PO authorization, scheduling, change order capture and client billing system. All services performed remotely, on time, for minimal cost, client pleased, RFP created and handed off to client as agreed.

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(3.25) **Mortgage Company* SharePoint 2013 Up and Ready for 31 Content Databases, Six Terabytes of User Files in 60 Days.** Find Profitable Niches in Commodity Loan Business: Pricing Dashboard for Resellers and Correspondents. **Lending Authority Nominations, Training, Approval, Risk Oversight, Client Database Defined for Resellers, Correspondents, Wholesale**

as **Alternative to Salesforce.Com**. HR Processes and Workflow. **Audit / Compliance Department Startup, Workflow.** Tech
Accomplishments: Datasheet View Solution Added, File Migration, "What Belongs in SharePoint, What Not". SharePoint 2013 Feature Testing. Up Arrow Navigation Aid, Master Page Modification, SharePoint 2013 Training Videos. (Password required)
- [Full Case Study](#)
- [Underlying Architecture, Technology, Code Samples](#)
- ["Who Using What" SQL Report, Audit Application](#)
- [IT Project Management Process Flow, Outcomes, Earned Value Reporting, Time Capture Chargeback to Business Unit](#)
- [Sample IT Project Management Application](#) (incomplete but good template to start from) ***
- [Sample IT Project Dashboard, Communicate to Business Impact of Continual Changes](#)
- [Pricing System for Correspondents, Client Dashboard](#)
- [Lending Authority and Product Nominations, Training, Approval, Risk Oversight Sample Application](#) (incomplete but good template to start from) ***
- "Runbook" documenting all aspects of install. (See SharePoint Working Docs)
- [Two Year Cost/Benefit Analysis, Hygiene Projects vs. High Value](#)

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(3.16) **Mortgage Company Case***: **\$1,000,000 upgrade of old system avoided, \$500,000+ in IT and operations costs saved over five years by providing 70 solutions to business users with No-Code Solutions. 153 Step Process Reduced to 89 Steps in 30 Days. Better, Faster Cheaper.***

The "Bowling Alley" of No Code Solutions
- [CLICK for Case Study*](#) (password required)

Letter Creation
- [Before Process Chart](#)
- [After Process Chart](#)
- [Dashboard Showing Reduction in Cost and "Touches" Over Four Months](#)
- Full Application [Video](#)
- Additional Application Details [Video](#)
- InfoPath Form Documentation [Video](#) shows **EXCELLENT TASK TRACKING** among multiple parties

Complaints Tracking Handling
- Full Application SQL Query lookup InfoPath form [Video](#) and [PDF](#)
- Synchronizing updates from SharePoint to SQL Server [Video](#) and [PDF](#)
- InfoPath Form Documentation [Video](#) and [PDF](#)

Audit Readiness, Remediation Task Tracking
- [One Page Executive Outcomes Process Chart](#)
- [Swimlane Process Flow Master with Workflow Functional Documentation](#)

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(3.12) **How to Dig Out of a Technology Black Hole, Get Product To Market Faster: Flailing Project Brought Under Control, \$300,000 Saved in Three Weeks, Cost to Bring New Product to Market Reduced by \$14 Million***

[-CLICK for Case Study](#)
[-Use Cases](#)

[-Trade Show Process Flow After](#)
[-Bid RFP Package Screen Specs](#)

[-Workflow Full Documentation Example](#)
[-Test Scripts](#)
[-Full Application Video and PDF](#)
[-Status Dashboard with Red Green Yellow Lights](#)
[-InfoPath Form Documentation Video and PDF](#)

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(3.13) **Order Processing Reduced from 5 Days to 1 1/2 Days Through Process Improvement***

[-CLICK for Case Study](#)
[-Use Cases Software Specification Bid Package](#)



(3.10) **Farmland Industries: Inventory Reduced by \$262,000 while Simultaneously Improving Customer Service for Paint Plant, Battery Plant***

[-CLICK for Case Study](#)



(3.8) **Alliance Data Systems: \$32 per hour Improvement in Gross Margins for Services Firm***

[-CLICK for Case Study](#)
[-Business Unit Functional Diagram Electric Utility](#)
[-Integration Flow Chart Difficult Mainframe Integration of Electric Utility System](#)
[-OBS WBS Major Software Release Plan](#)



(3.9) **Engineered Air Balance: 30 Percent Labor Savings and Improved Customer Service!***

[-CLICK for Case Study](#)
[-Earned Value Training Materials](#)



(3.5) **Flowserve: How We Completed a Rapid Results, "Don't Wait for IT Dept" Project Using Advanced SharePoint Tools. Estimated Payback of \$350,000/yr***

[-\(Case Study 35a for Business Audience\)](#)
[-\(Case Study 35b for Technical Audience\)](#)
[-Convert Lotus Notes, Access and other databases to SHAREPOINT \[Video Example 1\]\(#\) \[Example 2\]\(#\)](#)
[- Use SHAREPOINT BCS to get data from Oracle, SQL Server and other large databases \[Video Example 1\]\(#\) \[Example 2\]\(#\)](#)
[- Use INFOPATH forms with SHAREPOINT to make complex data entry easy for users \[Video Example 1\]\(#\) \[Example 2\]\(#\) \[Video Documentation Example 3\]\(#\)](#)
[- ASP.Net Testing Training Master](#)
[- SharePoint Standard Testing Protocol](#)
[- 32 Standard Bottlenecks Common to Engineered to Order Manufacturers](#)
[- Filter 6,000 line report down to 30 action items: See live example in Public Demo Systems](#)
[- SOX Application Code Samples \[Video PDF\]\(#\)](#)
[- Executive "Blue Book", \(Password 79\) Weekly, Monthly Consolidated Reporting Dashboard](#)



(3.6) **Frito Lay: How We Helped Accounts Payable Reduce the Cost to Pay an Invoice by 25%***

[-CLICK for Client Quote](#)



(3.7) **Crossmark: "Thank You" Note from Sales Agency President for Long Term, Large Scale Process Improvement Effort***

[-CLICK for Client Quote](#)

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(3.1) **How Nation-Wide Process Improvement Freed Up 63,000 Sales and Support Hours per year, Removed 250,000 Possible Customer Service Mistakes and Saved \$7.5 Million over Three Years***

[-CLICK for Case Study Before After](#)
[-Procedure Training Compliance Manual Example](#)
[-Software Actually Developed](#)
[-Day In The Life Rollout Training](#)
[-Software Functions Chart](#)
[-Time Study Process Efficiency](#)
[-Time Study Summary 14 Projects](#)
[-"Executive Blue Book" Top Level Reporting Sr Mgmt Dashboard of Division and Leader Results](#)



(3.4) **Texas Instruments: How We Helped Reduce Outstanding Accounts Receivable by \$1.5 Million and Complete Advanced Technology Project On-Time, On-Budget, As Promised using Earned Value***

[-CLICK for PMI Article](#)



(3.3) **Texas Instruments: How We Helped Accounts Payable Save \$450,000/year and Improve Service by 400%***

[-CLICK for PMI Article and Book Excerpt](#)
[-Screen Flow Use Case Example Simple](#)



(3.2) **Celanese: How Process Improvement Turned Around a Project In Trouble and Sold \$10 Million in New Services to Celanese in 90 Days***

[-CLICK for Case Study](#)

***Contact Us in Dallas, Texas, USA at tom@tomingraminc.com**
***Success stories, client quotes, estimated costs and benefits are derived from actual projects but may have been altered for simplicity, teaching purposes or to protect confidential information.**