

Past Performance Executive Summary

CRM America, Inc. | Microsoft Solutions Partner | SBA 8(a) Certified Small Business

COMPANY OVERVIEW

CRM America, Inc. is a 100% American-owned, SBA 8(a)-certified small business and a certified Microsoft Solutions Partner operating under a Master Services Agreement (MSA). Founded in 2004, CRM America specializes in legacy modernization, delivery of enterprise Microsoft platforms, and mission-critical digital transformation for federal agencies. Our capabilities span the full Microsoft ecosystem — Azure, Microsoft 365, Power Platform, Dynamics 365, SharePoint, Power BI, and enterprise security — delivering secure, scalable, and cost-effective solutions to the federal and public sectors. CRM America's UEID is W9BAE3YLKPJ5, CAGE Code 83PU8, and GSA Schedule #47QTCA18D00KM (54151S).

OUR FIVE DELIVERY PILLARS

Interoperability Seamless integration across agency systems and data sources	Security Zero Trust, FedRAMP, and DevSecOps-aligned architectures	Scalability Elastic platforms that grow without performance degradation	Self-Sufficiency Knowledge transfer ensuring agencies operate independently	Affordability Experience-driven staffing that maximizes value per dollar
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Our Microsoft Services Agreement (MSA) Related Benefits to the Federal Government

CRM America, Inc. is a Microsoft Certified Partner with a formal services and support relationship with Microsoft, enabling structured coordination through Microsoft's Partner Center and associated support programs. This relationship benefits the Federal Government by improving accountability, escalation efficiency, and alignment with Microsoft-published platform standards when Microsoft technologies support mission systems.

Through this partnership, CRM America can initiate and manage platform-level support escalations, coordinate issue resolution through Microsoft's documented partner support channels, and incorporate Microsoft lifecycle guidance and best practices into solution design and sustainment. While Microsoft retains full responsibility for platform reliability and support outcomes, CRM America's established relationship with Microsoft reduces operational friction for federal programs by clarifying roles, streamlining issue coordination, and supporting informed technical decision-making across the system lifecycle.

For federal agencies operating in Microsoft environments, this partner-level relationship supports more predictable operations, lower technical risk during modernization, and improved continuity between solution implementation and ongoing platform support, without limiting the Government's authority or creating reliance on proprietary or non-transparent support mechanisms.

PAST PERFORMANCE AT A GLANCE

#	Agency	Project	Value	Period	Status
1	CSOSA (DC)	Power Apps & SharePoint Development & Administration	\$8.1M+	2021 – 2028	Active
2	CSOSA (DC)	Power BI Business Intelligence Reporting	\$1.07M	2023 – 2025	Active
3	CSOSA (DC)	Microsoft Network Engineering Services	\$2.05M	2024 – 2028	Active
4	DOT – FMCSA	Case Management Dev Services (ACT-JV / STARS III)	\$3.3M	2023 – 2025	Completed
5	DOT	Access Request Initiation Application (ARIA)	N/A	Completed	Completed
6	Peace Corps	CRM Program Management (Dynamics CRM)	On Budget	Completed	Completed
7	DHS – USCG	SFLC Enterprise Data Modernization	Multi-Year	Active	Active

PROJECT NARRATIVE SUMMARIES**1. CSOSA – Power Apps & SharePoint Development and Administration**

Contract Value: \$8.1M+ | **Period:** July 2021 – July 2028 | **Contract #:** 9594CS21P0022 / 9594CS24P0014 | **Status:** Active

CRM America provides end-to-end Power Apps and SharePoint development and administration for CSOSA's Supervision Management and Record Tracking (SMART) system. Deliverables include a Power Apps Audit application that tracks Community Supervision Officer performance, SharePoint cloud migration of SMART records, policy tracking systems, and intranet/internet modernization. The engagement integrates directly with PSA's PRISM system and has been renewed for a second multi-year phase, reflecting exceptional client satisfaction and sustained delivery quality.

2. CSOSA – Microsoft Power BI Reporting

Contract Value: \$1.07M | **Period:** Sept 2023 – Sept 2025 | **Contract #:** 9594CS23P0044 | **Status:** Active

CRM America's business intelligence engineers developed a comprehensive suite of real-time Power BI dashboards and reports from CSOSA's Enterprise Data Warehouse — an environment of over 1,000 tables and ~500 views derived from SMART. Reports span supervision management, treatment services, caseload tracking, and drug testing analytics. Row-level security, data modeling, and DAX-based analytics ensure governed, accurate reporting for CSOSA leadership and program staff.

3. CSOSA – Microsoft Network Engineering Services

Contract Value: \$2.05M | **Period:** Aug 2024 – July 2028 | **Contract #:** 9594CS24P0016 | **Status:** Active

CRM America provides on-site and cloud-based network engineering and administration for CSOSA's full enterprise technology stack, including the Citrix virtual desktop environment, Microsoft Azure network infrastructure, Office 365 tenant, OneDrive, MS Teams, and an agency-wide Windows Desktop 11 upgrade. The team maintains mission-critical availability through controlled change management and proactive cybersecurity operations.

4. DOT FMCSA – Case Management Development Services

Contract Value: \$3.3M | **Period:** Sept 2023 – March 2025 | **Contract #:** 47QTCB22D0445 / TO 693JJ422F00069N | 693JJ423F00057N | **Vehicle:** GSA 8(a) STARS III | **CPARS:** Very Good

As the majority JV partner (ACT-JV), CRM America modernized and consolidated 70+ legacy FMCSA applications using Microsoft Power Platform, Azure, and Dynamics 365. The flagship Workflow Tracking Tool (WFTT) replaced a 20-year-old client-server case management system with a cloud-native Power Platform solution. Outcomes: 80% reduction in workflow cycle times, 99.95% system availability, and a Zero Trust / Defender for Cloud security posture — all while legacy systems remained operational.

DOT – Access Request Initiation Application (ARIA)

Agency: Department of Transportation | **Status:** Completed

CRM America modernized DOT's legacy access request process into a fully digital solution using Microsoft Power Apps, Power Automate, and Dataverse. The ARIA application replaced manual workflows with automated, multi-step approval routing, embedded real-time data validation, and a governed Dataverse data repository — reducing processing errors and accelerating access provisioning across DOT program areas.

5. Peace Corps – CRM Program Management

Agency: Peace Corps | **Platform:** Microsoft Dynamics CRM | **Status:** Delivered on time and within budget

CRM America designed, deployed, and managed the Peace Corps' enterprise CRM Program on Microsoft Dynamics CRM, including a Case Management System, Contact Management System, and Volunteer Lifecycle Management System. CRM America also executed the platform upgrade from Dynamics CRM 2013 to 2016 and integrated ClickDimensions for online marketing and correspondence automation — delivering all workstreams on schedule and within budget.

6. USCG SFLC – Enterprise Data Modernization

Contract Value: \$4.4M | **Period:** Oct 1 2025 – September 30 2027 | **Contract #:** 47QTCB22D0445 / TO 70Z04025FBODV0001 | **Vehicle:** GSA 8(a) STARS III | **CPARS:** n/a

Agency: DHS – U.S. Coast Guard, Surface Forces Logistics Center | **Status:** Active

CRM America is executing a multi-year, organization-wide enterprise modernization for USCG SFLC — the logistics arm supporting the Coast Guard's surface fleet. The program is organized into four solution streams: Integrated Solutions (legacy system modernization with operational continuity), Standalone Solutions (MVP-based targeted applications replacing unsupported tools), Business Intelligence Solutions (unified analytics foundation), and Governance Solutions (standards, DLP, and lifecycle frameworks). CRM America delivers software development, data migration, API integration, and Power Platform low/no-code solutions aligned to complex naval engineering requirements.

CORE CAPABILITIES DEMONSTRATED ACROSS ALL ENGAGEMENTS

• Microsoft Power Platform (Apps, Automate, Pages, BI)	• Azure Cloud Architecture & DevSecOps
• Legacy System Modernization & Consolidation	• SharePoint Enterprise Development & Administration
• Microsoft Dynamics 365 / CRM Program Delivery	• Business Intelligence & Enterprise Data Warehousing
• Network Engineering, Citrix VDI & M365 Administration	• Federal Case & Records Management Systems
• Data Migration & API Integration	• Zero Trust Security & FedRAMP Alignment
• Agile Program & Project Management	• Change Management, Training & Adoption Support

CRM America's portfolio reflects active and recently completed federal engagements, sustained multi-year contract renewals, and consistently high CPARS ratings — demonstrating the technical depth, program management discipline, and mission commitment to deliver complex modernization initiatives on schedule, within budget, and with measurable results.