STEP SE7EN

CONSULTING

Solving Business Challenges Through Technology

Analyze and plan the best path forward.

From strategy to implementation - we address all the issues.

Listen and collaborate to make the best decision.

Get the right people talking - we drive the communication.

Recommend and implement the right solution.

The Who, What, When, How - we align all resources.

READY TO START YOUR PROJECT?

Schedule a consultation
to get an initial cost estimate.

800-695-5107 // info@step7consulting.com

What We Do

Project Management

We do project leadership, management and scrum master facilitation for Agile software teams.

Business Intelligence

We do data visualization dashboards and reports using Microsoft Power BI and Google Analytics.

CRM

We do business workflow design and implementation in SalesForce, PipeDrive, MethodCRM, and more.

E-Commerce

We do planning, design, development, and integration in Magento, WooCommerce, and more.

> "
> The thoughtful consulting we received from Step 7 will surely prove to be invaluable to the future sucess of our business. Step 7 has effectively eliminated our clunky business processes and woefully outdated CRM and replaced them with a sophisticated set of tools which are easy to use and appropriate for our business.
>
> **Leanne Mumm Pardo**
> Co-President, One Hour Parties

Technologies

Google Analytics	Jira	Magento
method:CRM	Microsoft Azure	pipedrive
Power BI	intuit QuickBooks Enterprise	intuit QuickBooks Online
salesforce	TFS	Trello
WOO COMMERCE	WordPress	zapier

Who We Are

Formed in 2015, Step 7 Consulting has a simple mission, put client's interests first and leverage the business and technology experience of the team to deliver expertise that makes a bottom line difference.

Our team is led by Matthew Stanigar with a supporting team of technical experts. With 27 years of business & technology experience, Matthew serves as the principal consultant and team leader on many projects.

Our team includes experts in many areas:

- Assessments
- Planning
- Project Management
- Agile / ScrumMaster
- PHP Development
- ASP.NET Development
- Web Design
- Copywriting
- Microsoft Power BI
- Google Analytics
- WordPress
- WooCommerce

- Magento
- SalesForce
- PipeDrive
- MethodCRM
- Zapier
- SmartSheet
- Microsoft Azure
- JIRA
- Microsoft TFS
- Trello
- QuickBooks

When needed we will also bring in additional resources to meet the needs of a specific project.

Leadership

Matthew Stanigar
Founder & Principal Consultant

Matthew is the driving force behind Step 7 Consulting. With 25 years of business experience and 15 in senior management within technology companies, his passion for technology and leveraging it to help companies solve business challenges can't be overstated.

Trust is everything and earning it is at the core of what I and my team have to do every day with every client.

Outgoing and analytical, Matthew's technical roots stem from his days right out of college in the early 90s when he started doing database development. That skill continued to develop throughout his career even as he moved into management roles.

Prior to Step 7 Consulting, Matthew was Vice President for 10 years at J Street Technology. He was Vice President of Operations for four years working with Fortune 500 clients and leading over a dozen team members responsible for software design and implementation. He also served as Vice President of E-Commerce for 6 years working with clients and leading development and product management of the company's flagship e-commerce system. Matthew has also served as President of Ceviant, a venture backed e-commerce company and held positions with Nextel Communications, Allied Telesis, Boston Scientific, and Raleigh Bicycles.

While his career has involved writing "way too many lines of code" and looking at "way too many database diagrams", his greatest passion is working with clients as a collaborative partner. He holds to the view that the success of Step 7 Consulting is not only about delivering consultative expertise but doing so in a way that builds trust. In his words "Trust is everything and earning it is at the core of what I and my team have to do every day with every client".

Matthew holds an MBA from Seattle Pacific University and a BA from the University of Nevada, Las Vegas. In addition, he is an expert in the application of Agile methodologies and is a Certified ScrumMaster.

What People Say

When you work with great people and they take time to share their appreciation it's truly the best reward. Here are some of the experiences they've shared:

> *Matt was the project manager for a team working on our iOS and Android apps. His attention to detail and technical knowledge helped us hit our dates and put out a great product.* ***Matt exemplifies why projects need a strong project manager.***

Scott Whalley
Senior Project Manager, Microsoft

> ***Step 7 was able to guide us during the process from website design and structure to email marketing and search engine optimization.*** *Matt is an excellent project manager and helped us streamline our e-commerce business.*

Linda Powell
Owner, Apex Performance

> *Matt did an outstanding job. His coordination made it possible for everyone to know what was needed.* ***The work was completed on time and significantly under budget.*** *It was a great experience from start to finish.*

Jim Plummer
President, U-Fix-It

> *Matt quickly understands business challenges and works hard to create great solutions.* ***He's adept at implementing new technology, working with customers, managing employees, & running projects.*** *He has deep experience with web development, e-commerce, and database design. I strongly recommend Matt.*

Armen Stein
President, J Street Technology

Why Choose Us

Step 7 Consulting was created with the idea that experience matters, and when combined with commitment and integrity a consultancy can do great things for its clients.

Experience – We have over 25 years of business and technology experience and we are constantly updating our skills to stay current with the latest technologies.

Commitment – We make commitments and we keep them. We're dependable, responsive, and always put our clients interests first.

Integrity – We're honest and you'll always get a straight answer with us. We're transparent and we don't nickel and dime our clients or charge excessive fees.

Technical Expertise – We're experts in many areas. And if your project requires more we'll bring in the resources to get it done with your full knowledge so you always know who's working on your project.

Objectivity – Maintaining objectivity is key for us. While we're big supporters of various tools and services, we have no financial arrangement with any company and we never will. We may recommend one of the solutions we know best but only because we believe it's the best option and if it isn't we'll work with whichever one is best suited for the task.

Working With Us – We're accessible and happy to travel to your location in the Seattle area or out-of-state. We use the latest tools to communicate and share information with our clients including: Instant Messaging (Slack or Skype), Web Conferencing (JoinMe), Project Management (JIRA or Trello), and Time Tracking (Harvest).

We Travel – We leverage tools to work remotely but sometimes you need us on site and we're happy to travel to your location. Just say when and we'll be there.

Account Management – You will always have one account manager keeping you up to date on timelines, budget, and answering any questions.

Affordability – We are competitively priced and work on a time & materials basis.

Ongoing Support – When we do a project you can count on us to be there after. A lot of companies walk away when they're done and don't provide support. Not us. We will always be there when you need us whether that's a week or a year later.

Project Management

We provide leadership, technical project management, and certified scrum masters with the expertise to lead your technology project from inception through delivery.

From managing delivery of iOS and Android mobile apps for Microsoft and Verizon to leading migration of an enterprise accounting system to Microsoft Azure, we have the track record to make your technology project a success. Our approach - collaborate with the business and technical teams, utilize Scrum, facilitate communication, leverage the right tools, manage budget, and deliver on-time.

L4 Digital – Served as Sr. Technical Project Manager & Scrum Master while working with engineering to lead delivery of mobile apps for Microsoft and Verizon.

SKIS Painting – Defined costs, requirements, and led the migration of an on premise enterprise accounting system to Microsoft Azure.

Project Leadership

· High Level Analysis & Scoping

· Definition of Strategic Objectives

· Executive Summary Presentation

· Solution Recommendations

· RFP Preparation

· Timeline and Budget Definition

· Project Team Selection

· Resource Recruiting

Technical Project Management

· Define project charter and key stakeholders

· Identify scope and milestones

· Prepare schedule and identify key dependencies

· Assemble the right team and ensure cohesion

· Guide the SDLC: Assessment, Requirements, Design, Development, QA, Acceptance, Deployment

· Track progress and remove impediments

· Provide Mgmt with reporting and analysis

· Ensure end client satisfaction

Tools:

· *JIRA, TFS, SmartSheet, Trello*

Certified ScrumMaster

· Remove impediments

· Promote collaboration

· Serve as scrum master and facilitate

· *Sprint Planning*

· *Daily Scrum*

· *Backlog Grooming*

· *Sprint Review*

· *Retrospectives*

L4 Digital

L4 Digital, a Globant Company, needed a project manager and scrum master to help manage the delivery of the Microsoft Groove music app which it had been contracted to develop by Microsoft. Microsoft Groove is a streaming music service. Matt Stanigar served as the Sr. Technical Project Manager & Scrum Master working with a 7 member scrum team that included engineers, SDETS, and a product manager responsible for building the iOS and Android versions of Microsoft Groove.

Project:

Project Management
Scrum Master
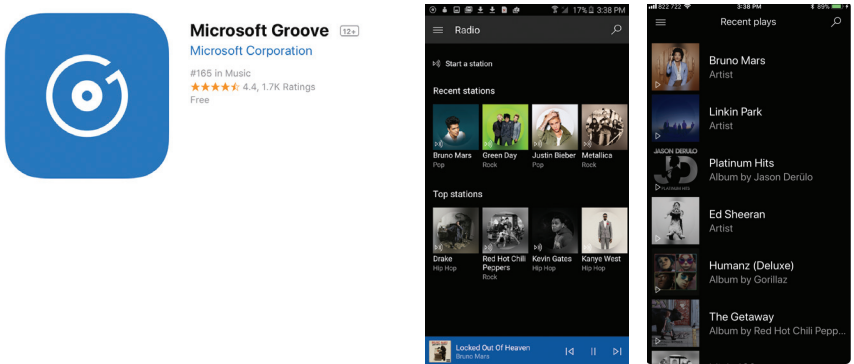Mobile Development

Technologies:

iOS
Android
JIRA
SmartSheet
TFS

KEY GOALS

Facilitate all sprint ceremonies and manage all sprint artifacts.

Remove impediments blocking success and work to foster team cohesion.

Achieve delivery excellence by ensuring that the project stays within budget and is delivered on-time.

SOLUTION

Managed the delivery process from requirements definition through development, QA, and deployment resulting in the on-time and on-budget delivery of 5 releases over 8 months.

Managed the delivery of 5 consecutive app store releases where star ratings increased from 2 to 4.5.

Supported senior management with weekly and monthly project status reporting and round table updates and analysis.

Facilitated sprint planning, backlog grooming, daily stand-ups, client demos, and retrospectives resulting in increased team collaboration, velocity, and completion of all sprint commitments.

Worked with the L4 account manager and Microsoft to craft statements of work including development commitments, budget, release milestones, and delivery scheduling.

Worked with the scrum team on the creation of user stories and acceptance criteria, backlog prioritization, bug triage, and issue resolution.

Work with QA / SDETs on test case planning, bug prioritization, and test suite reporting.

E-Commerce

With 18 years of e-commerce experience, our team has helped companies across the US. We take a comprehensive and tailored approach to meet the unique needs of each client. Whether it be strategy, design, development, conversion optimization, or custom features unique to your business, we provide the expertise to enable your e-commerce business to be a success.

Ortlieb USA – Led the development of a new B2B and B2C site with extensive backend integration with accounting and inventory systems.

Apex Performance – Led the design and development of a new B2C site with extensive search features for car racers.

Avid Angler – Led the design and development of a new Magento 2 site for fly fishing enthusiasts.

Nikko Media – Led the strategic business assessment and developed a new Website reflecting the goals of the business strategy.

Assessments, Strategy, Planning, and Implementation

Magento, WooCommerce, Other

B2B and B2C Configuration

Website Design

Custom Development

Mobile Optimization

Backend Integration:

· Accounting Integration (QuickBooks or any other)

· Inventory Integration

· Point-of-sale Integration

Search Engine Optimization (SEO)

Social Media Integration

Google Analytics Integration and Analysis

Email Marketing and Integration

Live Chat Integration

Category Management / Merchandising

Training and On-going Support

![WooCommerce logo]

![Magento logo]

Consumer Products Company

With thousands of SKUs, multiple price levels, multiple inventory locations, and hundreds of specialty and large chain retailers selling their products, Ortlieb was in need of a new e-commerce system to help it grow and support its b2b and b2c customers. Step 7 Consulting provided the following solutions along with many other capabilities to successfully implement a new e-commerce site for Ortlieb USA.

Project:

Technology Consulting
E-Commerce
Project Management
Custom Development
System Integration
Data Migration

Technologies:

WooCommerce
WordPress
QuickBooks
MailChimp
PayPal
Google Analytics

KEY GOALS

Upgrade the customer facing site to be visually appealing and mobile optimized so that channel partners and consumers can easily shop online through their desktop, phones, and tablets.

Integrate the e-commerce site with the inventory system so that channel partners can easily check inventory stock levels.

Provide seamless integration with the accounting system so that orders can automatically flow from the Web site into the accounting system.

SOLUTION

Conducted an initial technology assessment and conducted a search to find the best solution. This task involved reviewing almost 20 different systems.

Presented a recommendation to utilize WooCommerce with detailed reasons for how it would address all requirements and provide more benefits than requested.

Led a successful implementation with no downtime in e-commerce business and resulting in a nearly immediate increase in Web site utilization and order volume.

Provided online shoppers with a dramatically improved user experience with capability to easily order through their smartphones and tablets.

Integrated online storefront with their back-end QuickBooks Enterprise accounting and inventory system enabling orders to seamlessly flow through to the back-end and for storefront inventory stock levels to be automatically updated multiple times a day.

Integrated Live Chat system enabling online shoppers and customer service to quickly engage and increase conversion rates.

Integrated Google Analytics with back-end providing real-time data visualization and analytics.

Added custom features enabling shoppers to check in-store availability with any Ortlieb partner.

![Ortlieb website screenshots showing cyclists and a Messenger Bag Pro product page]
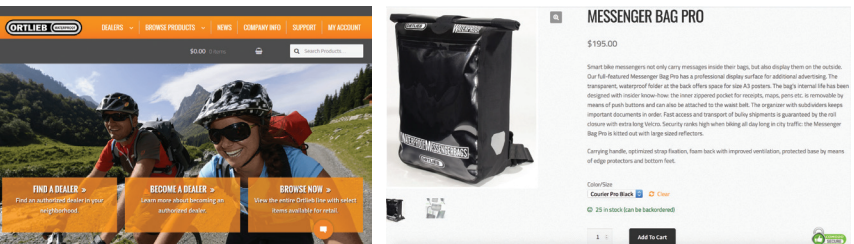
Business Intelligence

We focus on helping clients making sense of data by utilizing business intelligence (bi) solutions that enable them to make informed data-driven decisions.

Our approach to business intelligence consulting is to assess, plan, and implement. In one instance we can help leverage Microsoft Power BI to merge data from multiple systems and create a custom dashboard that provides the visualizations that shine a light on areas needing improvement. In another we can leverage Google Analytics to gain insights about customer engagement and improve sales conversions on their Web site.

SOG Knives – Provided assessment and led creation of Microsoft Power BI dashboard listing KPIs and utilizing data from Microsoft GP.

Ortlieb USA – Created Microsoft Power BI dashboard with end-to-end integration and automation with on-premise QuickBooks Enterprise Edition.

Assessments and Planning

Analytics Definition

Report Design

Dashboard Creation

Data Modeling

DAX Expressions

Data Integration Architecture

Database Query Development

Training

Ongoing Support

Google Analytics

Power BI

Consumer Products Company

This consumer products company is an industry leader with worldwide distribution and thousands of products sold through a network of channel partners. For years they managed all their business reporting in Excel spreadsheets that were consumbersome to produce, difficult to distribute due to the large size of files, and impossible to read on a mobile device. Step 7 Consulting provided the following solutions.

Project:

Technology Consulting
Business Intelligence
Project Management

Technologies:

Microsoft Power BI
Microsoft GP
Microsoft Excel
Data Modeling
DAX

KEY GOALS

Implement a business intelligence solution that is easy to maintain, reduces the amount of time needed to create reports, and makes it easy for employees to create new reports.

Enable management to interact with the reports to view data for different time periods and at different levels of detail.

Make the reports available and on-demand through a Web browser or mobile phone.

SOLUTION

Conducted an initial technology assessment of reporting requirements, how reports were created, what data sources were used, and how reports were disseminated.

Presented a recommendation to utilize Microsoft Power BI due to its ease of use, scalability, pre-existing integration hooks with multiple apps, ability to create complex custom reports, and ease of distribution through Web browsers and mobile phones.

Designed a central data repository to aggregate data used in Power BI reports.

Created over a dozen reports and an associated dashboard focused on KPIs.
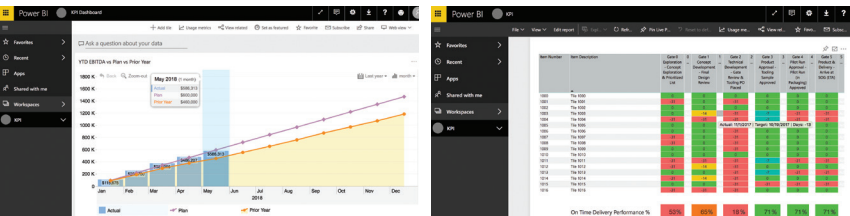
Trained staff how to build reports in Power BI and distribute them as Apps.

Customer Relationship Management

People, tasks and processes come together into one collaborative tool - the CRM system. The outcome - great efficiency, better customer experience, higher sales conversion rates, and greater insight into business operations.

Our approach is to assess, plan, and implement. Whether that involves helping you get started with the basics of setting up leads and opportunities to manage your pipeline or something more complex like integrating with your order management system, we provide the expertise to complete virtually any CRM project.

One Hour Parties – Led project definition and implementation of PipeDrive while utilizing Zapier to integrate with QuickBooks Online and Trello.

Ortlieb USA – Led implementation of Method:CRM providing integration with QuickBooks Enterprise Edition to provide end-to-end customer payment portal.

Assessments and Planning

Business Process WorkFlow Design

Activity and Task Definition

Data Import of Contacts

Configuration & Customization

System Integration
· Accounting
· Newsletter
· E-Commerce
· Office 365
· Google
· More

Training

Ongoing Support

method:CRM

pipedrive

salesforce

Event Management Company

This event management company has hundreds of business customers and thousands of vendors who support the events. For years they managed all their data in Excel spreadsheets that were inefficient and prone to error. Step 7 Consulting provided the following solutions.

Project:

Technology Consulting
CRM
Project Management
System Integration

Technologies:

PipeDrive
Zapier
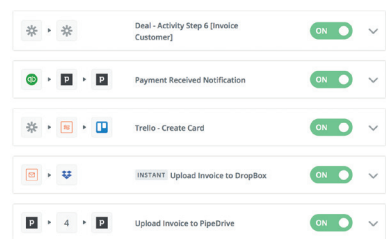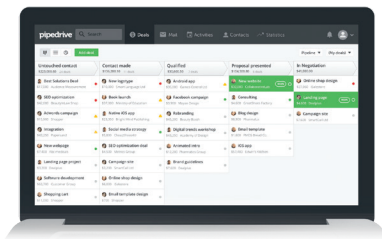QuickBooks
DropBox
Trello

KEY GOALS

Implement a cloud-based CRM that streamlines workflow and secures all data so it can't be lost.

Create a sales pipeline with key stages and activities to track leads, opportunities, and accounts.

Utilize Google Maps in CRM to identify which Vendors should be considered due to their proximity to the event venue.

Integrate CRM with QuickBooks Online to auto generate and email invoices then auto update CRM and QB when invoices are paid.

Integrate CRM with Trello to manage event delivery items.

SOLUTION

Conducted an initial technology assessment and conducted a search to find the best solution. This task involved reviewing a dozen different systems.

Presented a recommendation to utilize PipeDrive due to ease of use, customization, built in support for Google Maps, and integration with QuickBooks, Trello, and DropBox via Zapier.

Designed a new pipeline funnel with 7 stages and multiple associated activities.

Created Zaps in Zapier to auto create activities in PipeDrive when a deal moved to a new stage.

Created Zaps in Zapier to auto create and email invoices to clients and auto record all invoices and payments in QB and PipeDrive along with a historical repository in DropBox.

Integrated PipeDrive with Trello to auto create Trello Cards to manage event details.

Our Work

We work on various types of projects. Some examples of our work to date include the following:

- Worked as scrum master with 7 member scrum team including engineers, SDETs, and product managers to deliver iOS and Android mobile app for one of Microsoft's consumer services.

- Worked as scrum master with 7 member scrum team including engineers, SDETs, and product managers to deliver Android mobile app for one of Verizon's business services.

- Defined costs, requirements, and led the migration of and on-premise enterprise accounting system to Microsoft Azure.

- Conducted business assessment, defined branding strategy, and led development of a new Website reflecting the goals of the strategy.

- Led the development of a new B2B and B2C site powered by WooCommerce. Migrated thousands of products from the old e-commerce system and integrated new site with QuickBooks Enterprise to auto create invoices and auto update inventory stock status on the site.

- Led the design and development of a new B2C site with extensive search features for car racing enthusiasts.

- Provided assessment and led creation of Microsoft Power BI dashboard listing KPIs and utilizing data from Microsoft GP.

- Conducted assessment and led customization of Microsoft GP to streamline sales order processing.

- Created Microsoft Power BI dashboard with end-to-end integration and automation with on-premise QuickBooks Enterprise Edition.

- Led project definition and implementation of PipeDrive while utilizing Zapier to integrate with QuickBooks Online and Trello.

- Led implementation of Method:CRM providing integration with QuickBooks Enterprise Edition to provide end-to-end customer payment portal.

- Led migration from SalesForce to Method:CRM and created workflow automation to track leads, opportunities, and customers.

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