HOW AEC FIRMS ARE UNLOCKING GROWTH WITH A PURPOSE-BUILT CRM

Real-world case studies highlight architecture, engineering and construction firms that elevated their business by modernizing their CRM systems.

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THERE IS A BETTER WAY

Can business software make a real, meaningful difference in your firm's project outcomes, client satisfaction, employee experience and bottom line?

The answer is a resounding "Yes!" And the proof is right here in these pages, where you'll find real-life case studies involving architecture, engineering and construction firms that decided to leave behind outdated legacy software and processes in favor of a modern, integrated, user-friendly enterprise resource planning (ERP) or customer relationship management (CRM) solution, and the wide range of benefits they're enjoying as a result.

As daunting a prospect as migrating to a new CRM system might seem, as these case studies make clear, the process can be quick, straightforward and most importantly, worthwhile in terms of return on investment. From selection to implementation and beyond, we've collected these recent stories and added in some best practices gathered directly from our AEC customers to help decision-makers like you in your journey to finding software solutions that will be a true asset to your organization today and over the long term.

But don't just take our word for it. Read on to hear directly from your peers how rewarding their decision to switch has been — and could be for your own organization.

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# UNDERSTANDING WHAT A SUPERIOR CRM SYSTEM CAN DO FOR YOUR FIRM

Choosing a critical piece of business software like an enterprise resource planning or customer relationship management solution is not a decision to take lightly. The more thorough your due diligence leading up the decision, the better the outcome likely will be. Here's a quick FAQ to help guide you in the evaluation process.

Q. How to know the right time to move away from a legacy CRM system?

A. Oftentimes the inefficiencies and frustrations that come with sticking too long with a legacy system become too numerous and too undermining to the business to ignore. You'll know them when you see them. Perhaps revenue and win rates are sagging, without a clear reason why, or billing is painfully slow and error-prone, hampering cash flow. Maybe project managers, proposal-creation teams and others throughout the organization are spending way too much time hunting for Information. Perhaps decision-makers lack the timely insight they need to make the right calls for the business. Maybe project managers feel like they're flying blind. Or, maybe a disjointed, manual-intensive and glitchy user experience with the software is translating into low user adoption. If any of these ring true, it's time to find the modern, fully integrated solution your firm deserves
and needs.

Q. How much should service and support weigh in choosing a software provider?

A. The quality of service and support that comes with a software solution is as important as the solution itself. The goal is to find software that can scale with your firm over the long run, one that's backed by a provider who treats your firm as a business ally. Look for a provider that will be there every step of the way, not one that disappears after the sale. To be confident you're getting the former rather than the latter, be sure to ask your peers across the industry for recommendations and interview prospective providers. With your investment, you should expect hands-on support, ready access to subject-matter experts, deep education and training resources, and a direct feedback loop in which the provider welcomes, listens to and acts upon customer input. Remember, it's only a "solution" if it helps a firm solve its business problems.
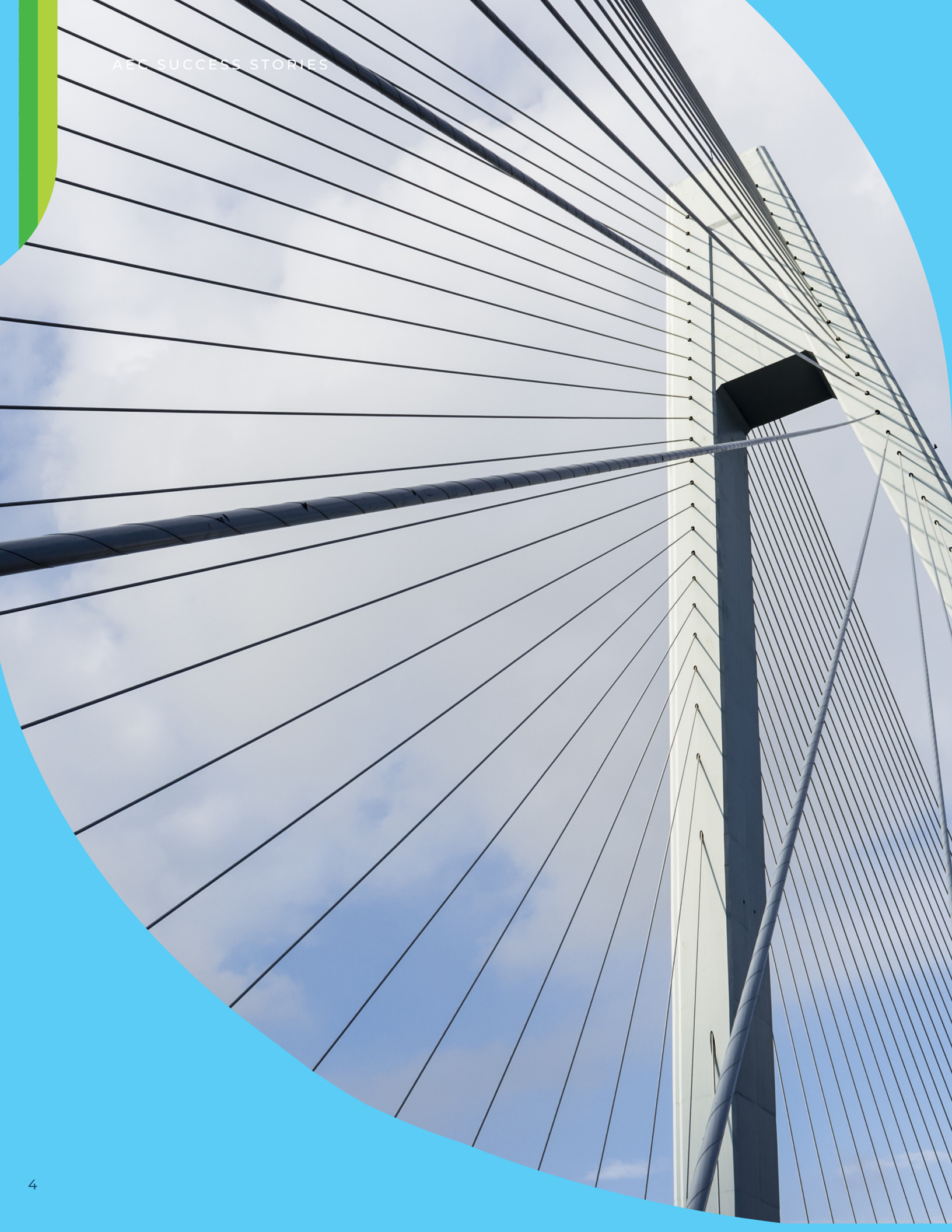
CRM SUCCESS STORIES

It's easy to tell AEC firms that have a fully integrated, digital, mobile-enabled customer relationship management (CRM) and proposal-generation solution from those that don't: They're the ones consistently cranking out winning proposals to land new business while maintaining strong relationships with existing clients. As the following case studies demonstrate, the journey to finding a better CRM solution can be hugely — and sustainably — rewarding.

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FOR AEC FIRM UMC, A LIGHTNING-FAST CRM IMPLEMENTATION PRODUCES POSITIVE RESULTS JUST AS QUICKLY

umc

ORGANIZATION PROFILE
Founded in 1920 and based in Mukilteo, Wash., UMC is an integrated, multi-discipline construction firm that has planned, designed, built and managed some of the most iconic projects in the U.S. Pacific Northwest. It specializes in design-build mechanical contracting, energy, facility service and manufacturing.

MOTIVATION FOR SEEKING A NEW ERP SOLUTION
The firm's legacy CRM system was highly unstable, poorly supported by the vendor, costly to maintain and provided a disjointed user experience.

Challenges

Sticking with the legacy CRM product became untenable for UMC due to:

- **An unreasonably high cost to maintain it.** UMC needed a dedicated full-time employee just to administer the system, along with a third-party provider to develop a custom overlay

- **Instability.** The system and overlay were plagued by frequent freezes, crashes, etc.

- **A glitchy user experience** translated into **low user adoption/engagement**.

- **Vendor support was spotty at best**, with lots of finger-pointing but no accountability from the software provider or the overlay vendor.

- Marketing, sales and business development teams **lacked a single, trusted source of data**, hampering collaboration.

The CRM Solution for UMC

UMC chose Unanet CRM because:

- As a system purpose-built for construction firms, it's well-suited to rapid implementations. Following the selection of Unanet CRM in late December 2020, it took a mere four months to get the system integrated and fully operational.

- It's provides a single, stable environment and data resource for the entire enterprise and its multiple divisions, without cumbersome third-party overlays.

- It offers the strong reporting, forecasting and account planning tools and capabilities that UMC sought, as well as a products module that enables quoting for the firm's reality-capture and manufactured products directly from the CRM.

- It's dashboard-driven to cater to a visually-oriented business.

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Impact

From Day One, Unanet CRM began delivering benefits, among them:

- Significant, immediate cost savings. The firm needs one less FTE and said goodbye to its third-party overlay developer.

- Fast implementation — without cutting corners. Unanet CRM was up and running in four months.

- At least 3X better user adoption with the new CRM system compared to the legacy system.

- Improved communication, collaboration and inter-departmental support across the company, the result of having a single source of truth and greater visibility into data. Marketing, sales and business development teams "have more to talk about among themselves and with customers, and everyone has a clear idea of what's happening with customers, with pursuits and with the pipeline," says Bob Frey, UMC's Director of Sales and Operations.

- Full, seamless and stable integration across product and project pricing, quoting, proposal-generation, and prospect and client interactions has enabled the firm to capture important new internal efficiencies. The UMC marketing team is working 20 to 30% more efficiently as a direct result of Unanet CRM's automated tools for proposal creation, résumé trafficking, etc.

- A contact base that grew 30% with Unanet CRM in less than a year.

- Zero reporting lag time, instead of 24 hours or more with the legacy CRM.

"Our marketing and business development teams are huge proponents of Unanet CRM, and all our lines of business have really come onboard with it, too. People are finding uses for CRM that they could never imagine before. Every bit of information that people need to know about what's happening within the company is there, at their fingertips, in Unanet CRM."

BOB FREY, DIRECTOR OF SALES & OPERATIONS

HOW GILBANE SETS THE PACE FOR GROWTH WITH TECHNOLOGY

Gilbane

ORGANIZATION PROFILE
Gilbane is among the country's largest and longest-running privately held and family-owned construction firms. Founded in 1870, it's a global, integrated and technology-forward construction and facility management services firm with 3,000 multidisciplinary professionals across 45 offices in the United States and abroad.

MOTIVATION FOR SEEKING A NEW ERP SOLUTION
Glaring deficiencies in Gilbane's legacy CRM systems were handcuffing the firm's business development teams with time-wasting inefficiencies and a lack of access to critical business intelligence at key moments during pursuits, while also hampering the firm's ability to leverage and share important institutional knowledge.

Challenges

Firm decision-makers and business development teams were repeatedly frustrated because:

- Critical tribal knowledge was leaking irretrievably from the firm as longer-tenured BD team members departed.

- Business pursuits were disjointed. Strategic knowledge-sharing between offices (about common clients, etc.) was virtually non-existent.

- User engagement sagged due to frequent software freeze-ups that led to lost work, lost data and lost confidence in technology.

- Important undertakings like pipeline forecasting and tracking had become an exercise in futility.

- They were spending an inordinate amount of time entering and tracking data offline.

The CRM Solution for Gilbane

Following a rigorous due diligence process, a cross-sectional Gilbane team chose Unanet CRM over other candidates for attributes like:

- Strong pre-sales relationship and pipeline management functionality.

- Ready access to the data BD teams need to strategically leverage the power of their relationships via the Unanet mobile app.

- Full integration between contact and opportunity management and email.

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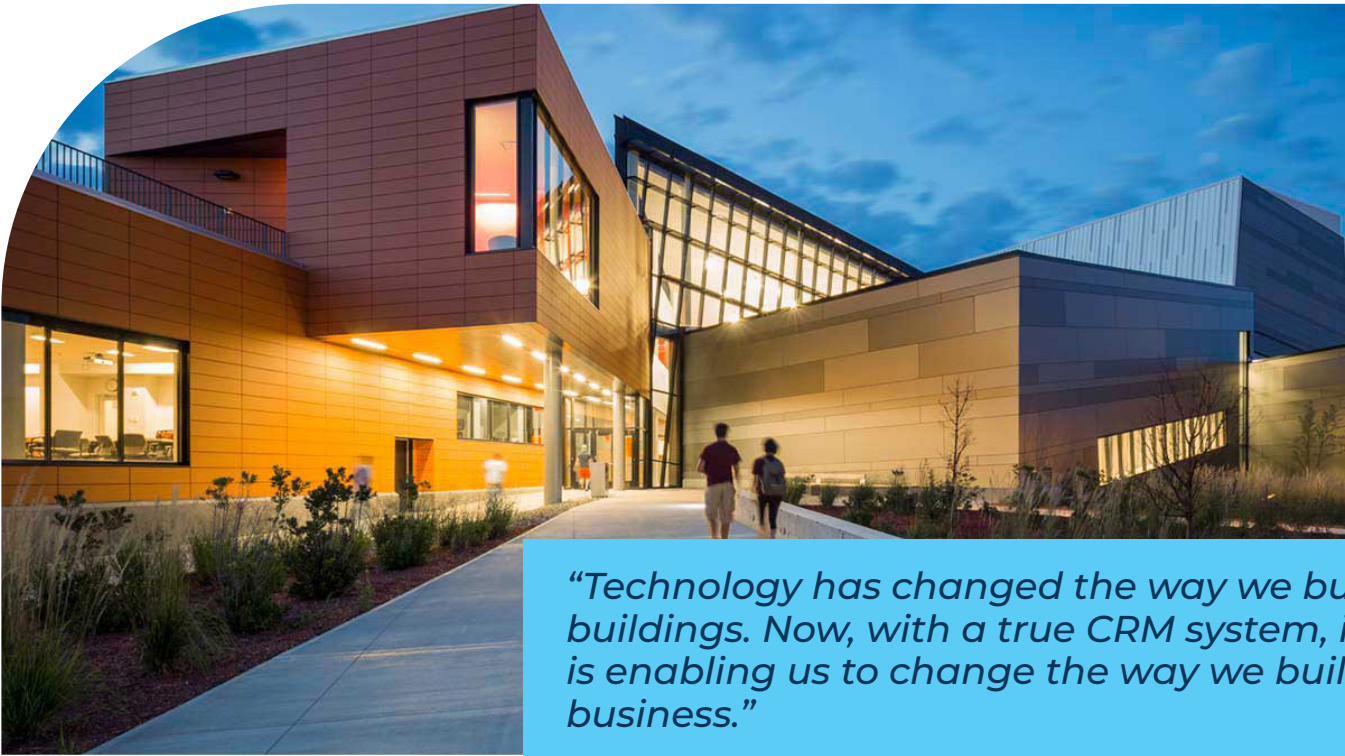
"Technology has changed the way we build buildings. Now, with a true CRM system, it also is enabling us to change the way we build our business."

RYAN HUTCHINS, EXECUTIVE VICE PRESIDENT

- The ability to surface and link strategic insights, like Linkedin profiles or company pages, to a contact, and to uncover all past records associated with a company.

- The ability to create call logs from a contact directly from a smartphone, plus a cross-channel caller ID capability that surfaces key contact and company information instantaneously when there's an incoming call tied to a pursuit, and the ability to create meeting plans straight from contacts.

Impact

The benefits that Unanet CRM solution Gilbane and its BD teams have been substantial and sustainable. They include:

- Fast ROI. Tighter synch between business development and marketing teams, along with better collaboration, information-sharing, visibility and decision-making firmwide, accelerates Gilbane's time-to-value.

- An edge in new business pursuits. Real-time access to vital business information, from any location and device, is helping BD teams to nurture relationships and strategically pursue projects.

- A long-term technology partner, not just a vendor. "Unanet gave us confidence that they will continue to invest in their products and their customers," says Gilbane's Ryan Hutchins.

- Future-proofing. Gilbane captures and shares insight and experience from past projects and other valuable institutional knowledge that can be leveraged for future successes and building stronger relationships.

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A.P. CONSTRUCTION INVESTS IN DIGITAL TRANSFORMATION FOR STRATEGIC PROJECT

ORGANIZATION PROFILE
Founded in 1981, A.P. Construction is a construction management and general contracting firm headquartered in Stamford, CT. It specializes in commercial buildings, educational facilities, healthcare and municipal facilities, private clubs, and multifamily and senior living properties.

MOTIVATION FOR SEEKING A NEW ERP SOLUTION
A heavy reliance on spreadsheets and manual processes was hampering the firm's ability to capture institutional knowledge and leverage its relationships to generate new business.

Challenges

Decades relying on unwieldy spreadsheets and cumbersome, time-consuming manual processes left leadership at A.P. Construction dealing with several issues, including:

- A very loose handle on the institutional knowledge that is so valuable in cultivating and maintaining critical relationships. A lot of the firm's history, project specifics and data lived in peoples' minds instead of in a database.

- Difficulty accessing the right information about business pursuits at the right time.

- A heavy reliance on manual processes that demanded redundant data entry.

The CRM Solution for A.P. Construction

By upgrading to Unanet CRM, A.P. Construction got:

- A platform robust enough to capture all its pre-existing tribal knowledge, while continuing to collect, organize, and store these insights in a way that could be easily accessed and quickly searched.

- A scalable solution for the entire business, not just a niche CRM point solution.

- Unanet CRM for Mobile for quick access to business contacts and other key pursuit info while on the go.

- Unanet CRM for Outlook to seamlessly capture and link vital communication, with smart auto-associations straight from email.

Impact

Having shed spreadsheets in favor of Unanet CRM, A.P. Construction is realizing a host of benefits from an integrated, mobile-enabled CRM solution, including:

- Having a single source of truth throughout a project pursuit enables APC to convert their insights into actions on the spot.

- In-the-moment sharing of institutional knowledge has proven invaluable in supporting pursuits.

- Richer, more strategic discussion fodder for weekly pipeline conversations because of moving from static documents to a dynamic reporting that illustrates opportunities in real time as they fit into their sales process, complete with streamlined views of goals and progress.

- Vastly improved visibility, thanks to centralized reporting with personalized dashboards to display only relevant data, with widgets for tracking and visual analysis to take a quick pulse of the business.

- A sustainable winning cycle. "Our wins become our collateral that we use to develop more wins," explains Jim Cecil, Director of Business Development at A.P. Construction.

"The more we drip information into Unanet CRM, the better we're able to leverage our data to make smarter decisions about things that we're going after, identify which buckets are too light or too heavy, or even address which competitors we're up against."

JIM CECIL, DIRECTOR OF BUSINESS DEVELOPMENT
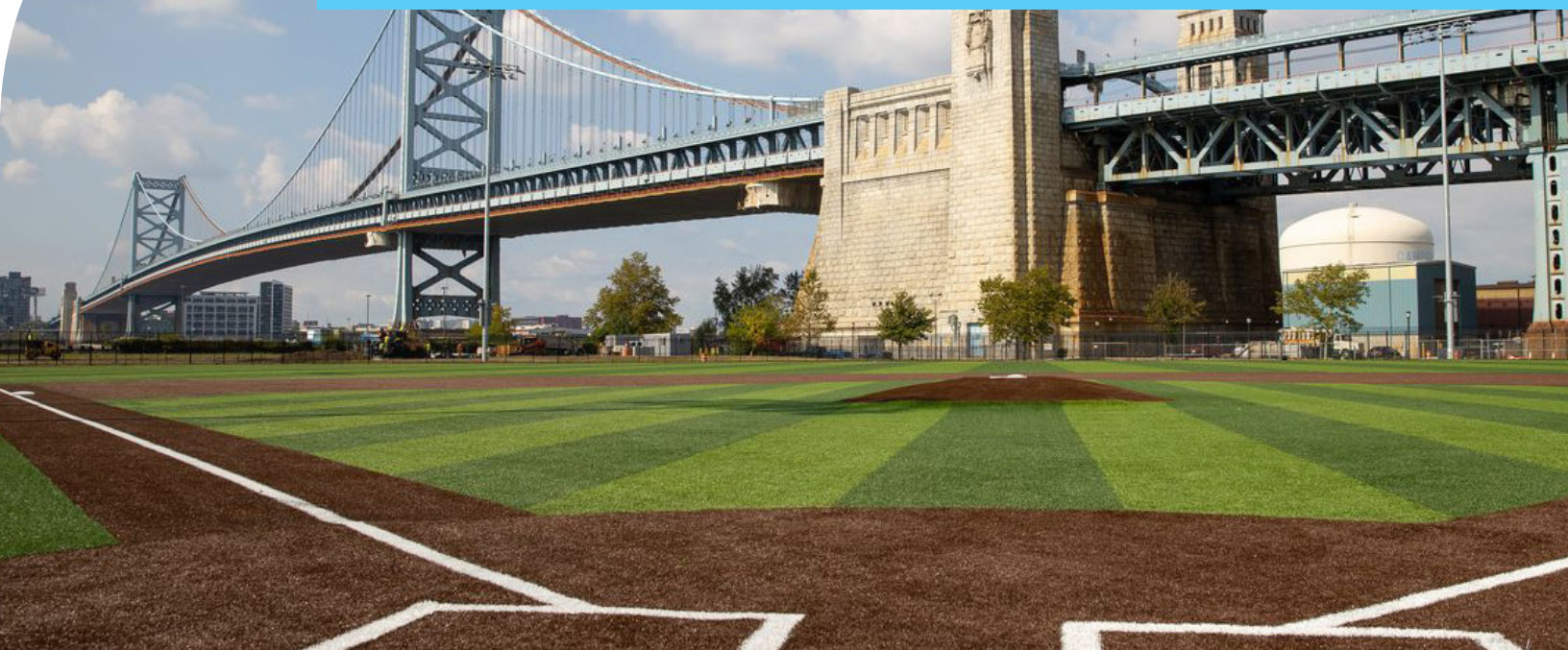
HOW LAYTON CONSTRUCTION'S LEAN MARKETING TEAM SUPPORTS THEIR GROWING, ENR TOP 50 FIRM PURSUIT

Layton
CONSTRUCTING WITH INTEGRITY

Layton Construction— an ENR Top 50 firm that brought in $1.4 billion in revenue in 2017 — serves the healthcare, office, retail, sports and recreation, higher education, hospitality and warehouse distribution industries in 20 to 30 states at any given time. And they rely on a lean marketing team to manage pursuits and proposals.

"If someone in one of our 10 offices needs any kind of sales support materials, they're reaching out to my team," said Travis Wilson, Director of Marketing. "That's kind of a constant process for us." The volume of requests they receive eventually strained their proposal management process to the brink...until they found Unanet CRM by Cosential, the Client Relationship Management (CRM) and Proposal Automation solution purpose-built for architecture, engineering and construction (AEC) firms.

"My team was struggling to collect information, and then, when they finally collected what they needed, it didn't always make it into a central repository," Travis said. "We were using this constantly growing spreadsheet to try and keep track of all the data we had, but over time, it just became overwhelming. We were constantly saying to ourselves, 'There's got to be a better way.'"

FINDING THE RIGHT WAY FORWARD

To address this issue, Travis, along with Layton Construction's CFO and IT director, sought a solution that would allow them to easily document, access and search key project data needed to complete proposals. Unanet CRM quickly caught their eye.

"It was pretty highly regarded within the AEC," Travis said. "I knew some of my peers were using it, so I started asking them questions." Soon, one of those firms gave Travis a first-hand demonstration of Unanet CRM's capabilities.

"We had a joint venture with another firm who showed us how they used Unanet CRM — including how easy it was to run reports," Travis explained. "Seeing it in action was really eye-opening. That's when we first said, 'Wow. We need to take a closer look at this.'" Taking a closer look proved fruitful, and Layton Construction soon decided to implement Unanet CRM. "The fact that it was built for the AEC was very attractive," Travis said. "And the ability to pull information from our financial system was also a big factor."

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HARNESSING THE POWER OF EASILY ACCESSIBLE DATA

Armed with a central repository of key project data, Travis and his team now quickly develop strategic proposals. "My marketing team is a lot more self-reliant — we're finding the information we need much quicker, and we're doing it mostly on our own. We just search in Unanet CRM, and it's there," Travis explained. "It saves considerable time by putting often-needed information at our team's fingertips." And It's not just the marketing team that benefits. "Before, we had to call or send an email to project managers, who were busy trying to get work done and move on to the next job," Travis said. "We always struggled with project managers saying, 'I know I gave this to someone on your team. Why are you asking for it again?' Now, we have a place to easily store and refer to information once we have it."

Part of what makes Unanet CRM so effective is the Financial Data Connector (FDC), which integrates the solution with their accounting software, CMiC. "If we ask a project manager, a project engineer and a salesperson a simple question about the value, size or cost of a project, we might get three different answers," Travis said. "But we know the information in our accounting system is correct, so connecting that with Unanet CRM was crucial."

Overall, Unanet CRM empowers Layton Construction's employees to focus on the tasks that lead to more projects and greater revenue … and Travis expects that trend to continue. "Anyone on our team would tell you how valuable this tool has been," Travis said. "And it gets more and more useful every day."

> *"We had a joint venture with another firm who showed us how they used Unanet CRM — including how easy it was to run reports. Seeing it in action was really eye-opening. That's when we first said, 'Wow. We need to take a closer look at this."*
>
> TRAVIS WILSON, DIRECTOR OF MARKETING

ENHANCING ACCOUNTABILITY THROUGH CRM SOPHISTICATION

W WIELAND

ORGANIZATION PROFILE

Six Decades of Exceptional Customer Service Headquartered in Lansing, Michigan, Wieland Construction has a long history of success within the construction industry. Chief areas of focus include construction management, general contracting and design/build projects. The firm has worked with several major clients, including General Mills, Bombardier and Bridgestone, among others. Over the past two decades, the firm's sales have skyrocketed from $30 million to $300 million. This impressive growth has been driven, in part, by the company's steadfast focus on customer satisfaction.

Wieland and Unanet CRM by Cosential: Making the Switch

Prior to working with Unanet CRM, Wieland relied on another, more generic CRM, which lacked the intentionality and sophistication the company required. Despite this, Wieland continued to work with this CRM for some time. The need for a more robust CRM became most evident as Wieland expanded its operations beyond Michigan into other regions and as they sought an approach involving a cloud-based system.

Prior to switching to Unanet CRM, Wieland lacked satisfactory customer support. Vice President of Marketing Kevin Shaw explains that, as a third party provider, his previous CRM was not invested in Wieland's experience and success. Although he doesn't regard "unresponsive" as an apt description, he does feel that the previous platform failed to provide the sophistication needed for a rapidly evolving industry. For example, before Wieland forged its relationship with Unanet CRM, Shaw hand-produced reports via Excel. Looking back, he regrets losing time having to manipulate data in Excel outside of the CRM, as to gain a vantage point that a product-based CRM couldn't provide.

Another motivator for Shaw? Software as a Service (SaaS) platforms. He discovered this cloud-based software distribution model while exploring his options with Unanet CRM. He admits that he "really liked the idea of a webbased login without having to install software."

The switch to Unanet CRM was largely motivated by Wieland's executives, who recognized the need for a new approach. As the VP of Marketing, Shaw's job at the time was to "examine a couple opportunities and then make an assessment." Ultimately won over by excellent customer service and the promise of SaaS, Shaw and the VP of New Business Development suggested Unanet CRM.

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Wieland's Present Relationship With Unanet CRM

Unanet CRM currently plays a huge role in Wieland's marketing and business development groups. It has also recently been expanded for use by the corporate recruiter. According to Shaw, the transformation within these departments cannot be overstated. Although the changes within Wieland were swift upon switching to Unanet CRM, Shaw still wanted to give employees ample time to adjust before introducing new initiatives. Now that they've been given the opportunity to "crawl before they walk," Shaw has been pushing more of the platform's capability. Here are few specific ways their process has changed:

1. Any interaction with clients, new or old, is immediately entered into Unanet CRM.

2. The lead and lead-convert-to-opportunity mechanisms are being used to better track potential business.

3. Wieland is using the opportunity coding system as a way to present monthly opportunity reports to the shareholder team.

4. The phone logging system allows Shaw to track important contact with what he calls the MIP (Most Important Person).

Unanet CRM by Cosential's Role in Achieving Revenue Goals

Executives at Wieland are pleased by the progress — largely aided by Unanet CRM — the firm has made in a few short years. Shaw explains, "If you looked at where we were three years ago to where we are now, it's 100 percent improved."

The primary source of these improvements? Enhanced accountability. Expectations are higher than ever for Wieland's marketing team members and BDMs, but employees are rising to the occasion. For example, Unanet CRM's administrative features allow Shaw to determine how frequently business development managers log in. "If I have a BDM who hasn't logged into Unanet CRM in a week, we have a problem." In addition to keeping business development managers accountable, Shaw believes that Unanet CRM's approach keeps BDMs far more organized than they would be with another CRM.

Shaw sums up Wieland's relationship with Unanet CRM as follows: "The rising tide is floating all boats higher." With Unanet CRM's help, Wieland's marketing and business development team members are more organized and show more initiative. Unanet CRM keeps all parties accountable, while optimizing operations in all areas of the sales funnel.

"Using Unanet CRM and those reports that are getting put out on a regular basis is really changing things and moving it in the right direction. It's been huge."

BEST PRACTICES FOR CRM SUCCESS

In a bottom-line focused business like AEC, quick time-to-value and maximum return from your CRM investment matter.
The best practices detailed below will help get you there.

BEFORE CHOOSING AN ERP OR CRM SOLUTION:

1. **Prioritize a purpose-built solution designed for project-based businesses.** Having a system that maps directly to your processes, systems and workflows speeds implementation/migration on the front end and leads to much stronger user engagement.

2. **Look for a solution you can use enterprise-wide.** Don't settle for piecemeal products. A patchwork approach could drag a firm right back to the inefficient, siloed and opaque world it sought to escape.

3. **Look for a mobile-enabled solution to support a field workforce.** A mobile app keeps your people connected wherever they're working and spares them tedious, time-consuming manual work.

4. **Don't cut corners in the due diligence process.** Evaluate multiple solutions, validate data, map your processes, gather feedback, consider factors like total cost of ownership, and test-drive the software prior to deciding.

5. **Be inclusive and collaborative in the selection and implementation processes.** Give all relevant facets of the business — IT, HR, business development, operations, project management, etc. — a voice in evaluation and selection.

6. **Look for a solution that comes with open integrations.** With the ability to seamlessly connect CRM, ERP and other key systems via pre-built integrations, a firm can build a full digital ecosystem.

7. **Don't settle for a lengthy 12-18 month implementation/migration timeline.** With strong vendor support, the process can be completed much faster.

8. **Find a provider who treats you like a true partner.** Having a software provider that guides you every step of the way is critical to a positive outcome.

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DURING AND AFTER IMPLEMENTATION:

1. **Take a methodical approach to implementation.** Create a detailed plan for a structured (but flexible) migration process.

2. **Thoughtfully manage the change initiative.** Communicate and communicate some more, ensuring people understand why you chose the software you did and how it will improve their workflow.

3. **Make process automation a top priority.** Doing away with manual, repetitive tasks and spreadsheet-heavy processes saves time, and improves the employee experience.

4. **Take full advantage of support and educational resources.** Your software provider should offer a robust library of training and educational assets, along with 24/7 support to get your issues resolved and questions answered promptly.

5. **Encourage self-sufficiency as part of the training process.** Motivate people to explore the software and learn how to use tools/functionalities, and let them know support resources are readily accessible should they need them.

6. **Measure and document.** Define, implement and closely monitor KPIs to gauge the impact of the system you're implementing.

7. **Offer feedback to your provider.** The best software providers not only value and welcome input from their customers, they act upon it to strengthen products and processes.

UNANET: BEST-IN-CLASS SOLUTIONS, BUILT FOR GROWTH

Unanet CRM

Unanet CRM has a 30-year track record of doing exactly what a best-in-class CRM solution should do: Help firms in the architecture, engineering and construction industries win more — and better — business, make better decisions and grow their revenue.

A cloud-based CRM and proposal-generation solution designed specifically for AEC firms, Unanet CRM serves as the system-of-record for all a firm's relationships and business pursuits. Unlike generic solutions that only manage contact data, Unanet CRM is purpose-built for AEC firms, so it comes with industry best practices built-in and seamlessly manages the nuances of their business pursuits, including teamed opportunities and multiple offices/business units.

Designed from the ground, up, to support the workflows, processes, information and relationships on which AEC businesses rely to grow, Unanet CRM gives development teams, marketers, salespeople, project managers and execs an integrated platform for cultivating, nurturing, managing and viewing every aspect of their prospect and customer relationships. That platform provides:

- A single source of data truth, readily accessible across teams, departments and offices.

- Robust, automated business-development and proposal-generation capabilities.

- Dashboard-based data visibility into each prospect and pursuit, from initial contact all the way through to project hand-off.

- Time-saving automation of previously labor-intensive tasks.

- Full work-from-anywhere mobile-enablement, tailored to support people who conduct important business in the field.

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At the heart of Unanet CRM is the multifaceted "New Business Development Experience," unrivalled among AEC industry CRMs in terms of pre-sales relationship and pipeline management functionality. A key element of that experience is Unanet CRM for Mobile, a mobile app for iOS and Android that enables business developers to access and manage contacts from anywhere, and feed their colleagues important relationship and pursuit information on-the-go, without interrupting their workflow or pursuit by necessitating multiple web page logins. This level of visibility and timely access to data is critical to winning business pursuits.

THE NEXT STEP IS YOURS

To stick with the legacy software your firm has been using, and continue living with the consequences, or find a modern CRM system that will empower your business, teams and employees instead of holding them back? The tech infrastructure decisions an architecture, engineering and construction firm makes can reverberate across the business for years, even decades.

Our best advice: Do your research, weigh the factors that matter most to your firm and its people, and may the best solution for the job win.

If you're ready to shed the frustration and risk that comes with relying on outdated software, and you're interested in embarking on a rewarding CRM journey like those highlighted in these pages, the Unanet sales team would love to hear from you.

VISIT UNANET.COM TO LEARN MORE

⬠ Unanet™

Unanet is a leading provider of ERP and CRM solutions purpose-built for Government Contractors, AEC, and Professional Services. More than 3,700 project-driven organizations depend on Unanet to turn their information into actionable insights, drive better decision-making, and nurture business growth.

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