


# Proposal Automation

Thursday, July 19




What It Means and How To Get Started  
[ckearneyconsulting.com/pa](http://ckearneyconsulting.com/pa)

**Courtney Kearney, CPSM**  
 CKearney Consulting LLC  
 Founder & Owner

**Chaz Ross-Munro, CPSM, CF APMP**  
**COSENTIAL**  
 Implementation Specialist

# Courtney Kearney, CPSM

CKearney Consulting | Founder & Owner




- Wife, Mom & Data-loving Marketer
- 20 years of experience – that's 41,600 hours!
- Texas girl born and raised – Now in DFW
- Teal hair, don't care
- President of the FW chapter
- Started using CRM systems in 8th grade during her first internship

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# Chaz Ross-Munro, CPSM

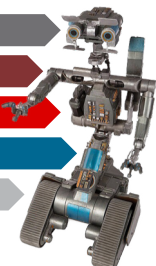
Cosential | Implementation Specialist



- Proposal Hacker, Cat Herder, Scrum Master
- 13 years of experience – that's 27,040 hours!
- From the "Show Me" state (Missouri), now in Tampa
- Chaz isn't short for anything
- Past President of the Tampa Bay chapter
- Wrote Sink or Swim Faster! In 3 months & all proceeds go to SMPS TB!

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# Agenda



- What Does Proposal Automation Mean
- Why Proposal Automation (PA)
- How to Prepare for PA
- Implementing the PA Phases
- Keeping a Good Thing Going

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# We want to hear from... each of you!



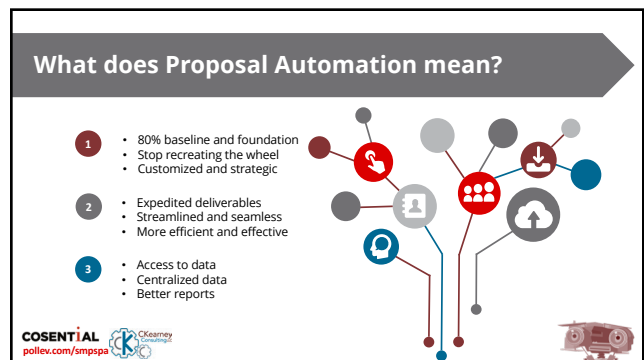
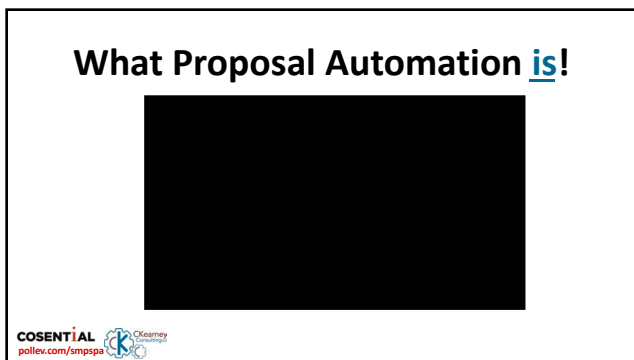
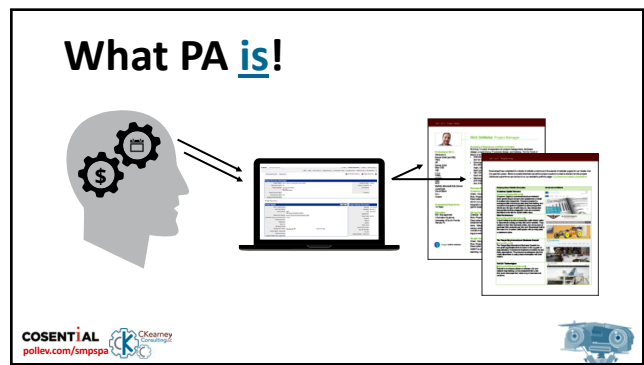
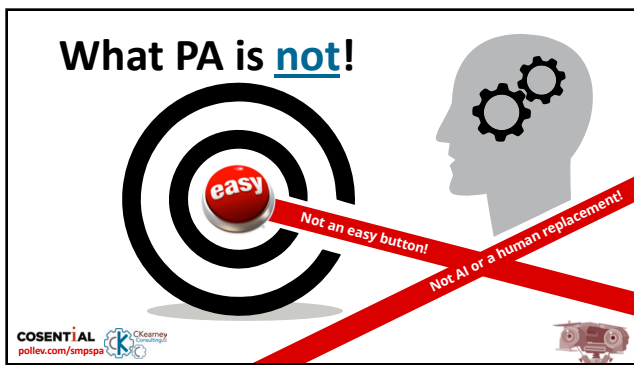
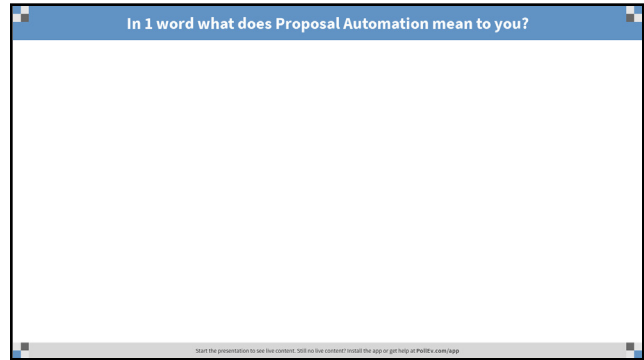
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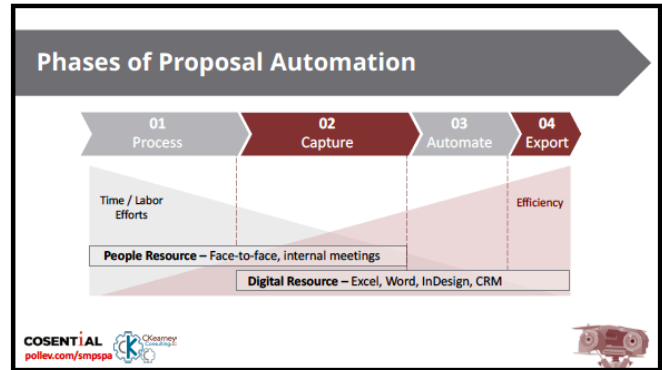
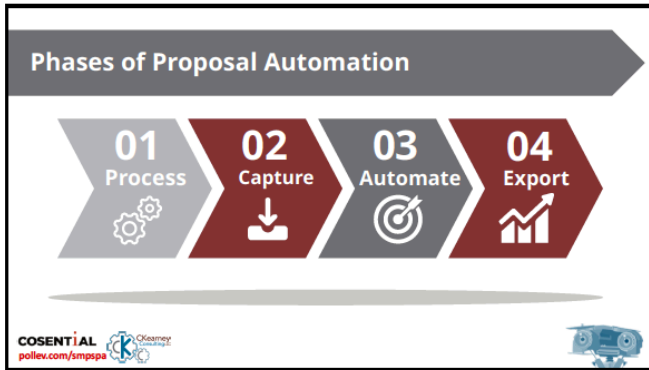
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 Check the Go To Meeting chat window for link



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### Why Proposal Automation?

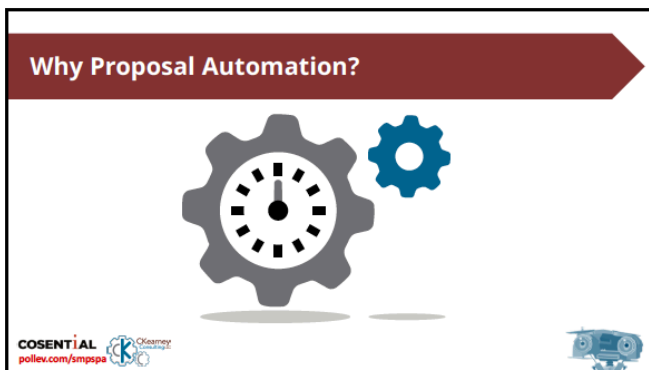
**It's about  
winning and keeping  
clients**

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### Why Proposal Automation?

Internal Clients Working as a Team Saves Time and Money Real-Time Data Entry

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### How to prepare for PA?

Building a culture of change starts with...

**YOU**

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## How to prepare for PA?

**01** Have your CRM open all the time?  
Were you repeatedly going for info?  
What do you do when you find data?  
Are you paying it forward?

**02** Actions are contagious  
Encourage others to join you  
They too will pay it forward

**03** Market your CRM or data system  
Campaign the change  
Communicate, communicate, communicate

## How to implement PA?

### PA Spectrum

Wavelength nm

Rocking the PA

Haven't Started Yet

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## Steps Toward PA

PA Score  
0 - 30%

PA Score  
31 - 55%

PA Score  
56 - 99%

PA Score  
100%  
Fully Automated

## Implementing the PA Phases

**Automation**  
Where are the areas of automation?

- Complete the project
- Repeat the process
- Who's responsible?
- Who needs to be notified?

**Export**  
Identify the desired output

**Capture**  
Is the right data being captured? Integrations with other systems?

- Begin the client relationship
- Get a project lead
- Who's responsible?
- Who needs to be notified?

**Automation**

- Win the client/project
- Collect data on the project
- Who's responsible?
- Who needs to be notified?

**Capture**

- Court clients / build relationships
- Prepare the submittals
- Who's responsible?
- Who needs to be notified?

## Remember to...

Prioritize Your Goals

Review Your Map

Celebrate Your Wins

### Implementing the PA Phases

**No CRM  
No Process**      **Have a CRM  
Have a Process**      **Fully  
Automated**

### Implementing the PA Phases

**No CRM  
No Process**

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### Implementing the PA Phases

**Have a CRM  
Have a Process**

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### Implementing the PA Phases

**Fully  
Automated**

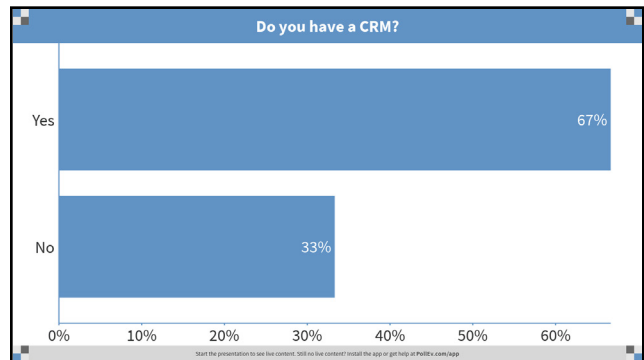
Contract Field	Value Field	Direction
Project Number	Job	Write to CoCentral
Sub Project of	Contract	Write to CoCentral
Project Name	Description	Write to CoCentral
Other Project Name	Description	Write to CoCentral
Published Project Name	Description	Write to CoCentral
Project Status	Job Status	Write to CoCentral
Firm Org Office	ACRMP / Company	Write to CoCentral
Firm Org Division	ACRMP / Department	Write to CoCentral
Primary Category	Project Type	Write to CoCentral
Contract Type	Contract Type	Write to CoCentral
Address 1	Mailing Address	Write to CoCentral
City	Mailing City	Write to CoCentral
State/Prov	Mailing State	Write to CoCentral
Project Code	Mailing ID	Write to CoCentral
Client	Mailing Company	Write to CoCentral
Original Construction	Year Orig. Contract	Write to CoCentral
Contract ID/CS	(Total Cur. Contract - Total Orig. Contract)	Write to CoCentral
Standard Change Order	Contract	Write to CoCentral
Week (CPI) Week	Contract	Write to CoCentral
Cost	Scheduled Start Date	Write to CoCentral

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### Implementing the PA Phases




**Fully  
Automated**


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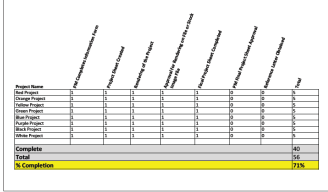
### For Those With a CRM




-  Access
-  Process
-  System

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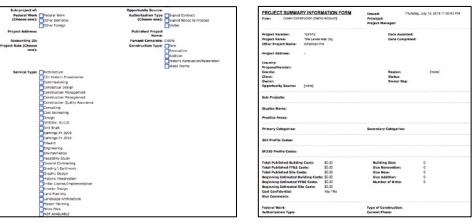
### For Those Without a CRM




Project Name	1	2	3	4	5	6	7	8	9	10	11	12
Complete	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Total	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
% Completion	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%

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### Keeping a Good Thing Going




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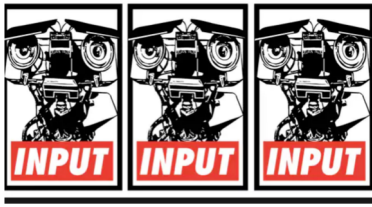
### Keeping a Good Thing Going


**ABD**  
Always  
Be in your  
Data

Task	Start	Target
Performance Report... All projects with no Staff Tasks	00:00	Projects
Performance Report... All projects with no Completion Date	00:00	Projects
Performance Report... All projects with no Cost	00:00	Projects
Performance Report... All projects with no Budget	00:00	Projects
Performance Report... All projects with no Date	00:00	Projects
Performance Report... All projects with no Contract Type	00:00	Projects
Performance Report... All projects with no Delivery Method	00:00	Projects
Performance Report... All projects with no First Day	00:00	Projects
Performance Report... Employees 20	00:01	Personnel
Performance Report... Revenue with no Status	00:00	Personnel
Performance Report... Contracts with no Contract Type	00:01	Contracts
Performance Report... Contracts with no Address	00:01	Contracts
Performance Report... CMC Contract Details	00:01	Contracts
Performance Report... Work with no First Day Revenue List	00:00	Reports
Performance Report... Work with no First Day Client Data List	00:01	Reports
Performance Report... Work with no First Day Demographic Location	00:00	Reports
Performance Report... Work with no First Day Market Segment	00:00	Reports
Performance Report... Contract with all... Close Date	00:00	Reports
Performance Report... Contract with all... Close SA... Contracted	00:00	Reports
Performance Report... Contracts and Contracts		Group Reports
Performance Report... Association		Group Reports

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### Keeping a Good Thing Going




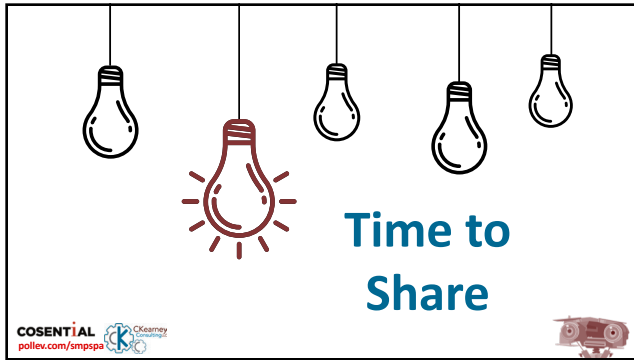
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### Strategies to catch up when behind

- 1 Don't get overwhelmed
- 2 What's really important to your firm?
- 3 Get creative



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