

Proposal Automation

What It Means and How To Get Started

Presented Thursday, July 19

By:

Courtney Kearney, CPSM



Founder & Owner

courtney@ckearneyconsulting.com

LinkedIn [/courtneykearney/](#)

Twitter [@ckearneyconsult](#)

Facebook [@ckearneyconsulting](#)

Chaz Ross-Munro, CF APMP



Implementation Specialist

crossmunro@cosential.com

LinkedIn [/chazmarierossmunro/](#)

Twitter [@chazrossmunro](#)

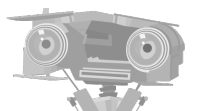
We plan to regularly review and refresh this documentation so be sure to sign up for the [CKearney Consulting newsletter](#) on our website to be notified of updates.

Proposal Automation Scorecard

- | | | |
|---|---------------|-------------|
| 1. Do you have a CRM system? | Yes
25 pts | No
0 pts |
| 2. Do you have your proposal process and project lifecycle documented and mapped? | Yes
20 pts | No
0 pts |
| 3. Does your firm have more than one office? | Yes
10 pts | No
0 pts |
| 4. Do you have a significant population of your firm that is close to retirement? | Yes
10 pts | No
0 pts |
| 5. Has your company recently experienced losing a project pursuit they could have won if they were more organized or strategic with pursuing projects? | Yes
10 pts | No
0 pts |
| 6. Is your leadership frustrated with updating resumes every proposal or complain about finding the same mistake in submittals? | Yes
15 pts | No
0 pts |
| 7. Do you have a champion in an influential role backing your efforts to move forward with streamlining your proposal process and move forward with automation? | Yes
10 pts | No
0 pts |

PA Score Results

- 0 – 24 Points :: Minimal Automation
- 25 – 55 Points :: Semi Automated
- 56 – 100 Points :: Majority/Fully Automated



Proposal Automation (PA) Resources

0 – 24 points :: Minimal Automation

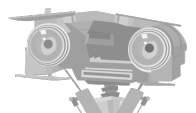
You have not yet reached the point to assemble your pieces into a fully functioning proposal automation tool. Instead of forcing your firm into a system or tool it is not yet ready for, spend this time preparing.

If you scored less than 25 points, you do not have a CRM system and your proposal process as well as project lifecycle are undocumented and not mapped. These items are a great place to start.

1. **Evaluating CRM Systems.** See page 6 for a comparison of top CRM systems in the AEC industry. As well as a checklist to use while evaluating the options to find the best fit for your firm.
2. **Documenting your process.** As outlined in our presentation, the best step you can take towards proposal automation is mapping your process and having clear documentation. We've included that process map on page 9 and a checklist to use while walking through the process.

If you answered yes to any of the following questions, use it to your advantage as these are reasons to prioritize PA.

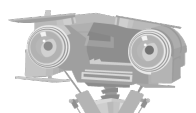
3. **Does your firm have more than one office?**
 - o Establishing a workflow notification to communicate to personnel based on geographic location when opportunities have been created increases efficiency and transparency.
 - o A centralized data source is key when managing multiple locations. It is no longer feasible to share one Excel file for all your pursuits.
 - o A single source of truth becomes exponentially more valuable when your staff is spread over a greater distance than a hallway.
4. **Do you have a significant population of your firm that is close to retirement?**
 - o You are likely already discussing the strategy to get the historical information out of the heads of senior staff before they walk out the door with all that valuable information. Creating a process to capture that intel should be a priority and what better place to store that than a CRM or a master document that can be used for PA.



5. Has your company recently experienced losing a project pursuit they could have won if they were more organized or strategic with pursuing projects?
 - Although no one ever wants this to happen, it is a perfect pain point to capitalize on to get the purchase of a CRM system prioritized.
 - Having a tool to help with communication will reduce the chances for a loss due to lack of organization.
 - Proposal automation produces that baseline proposal that is 80% complete allowing you time and resources to focus on strategy and customizing the final 20%.

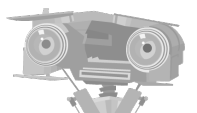
6. Is your leadership frustrated with updating resumes every proposal or complain about finding the same mistake in submittals?
 - These frustrations are common and fantastic to use when prioritizing the efforts needed to make PA happen or to purchase a CRM.
 - Tools that automate master resumes require the information be entered and maintained in one place ensuring you do not make repetitive content errors and always have a record of leaderships last updates.

7. Do you have a champion in an influential role backing your efforts to move forward with streamlining your proposal process and move forward with automation?
 - Have your champion lead by **example**. If they're using the system and sharing with their peers and fellow users what great things they are able to accomplish because to the CRM, their excitement will be contagious and encourage buy-in.
 - Be the voice of **authority**. When they lead meetings, encourage them to only use the CRM and no longer use old systems or spreadsheets. If they don't allow those other items, they will stop being used.
 - Be the voice of **celebration**. When you hit a milestone include it in the newsletter or send a company-wide email. Ask them to author the article or send the email.
 - Be the voice of **accountability**. If users are not entering information or keeping their data up to date or using rogue Excel spreadsheet ask your champion to remind them of the company's commitment to the CRM process.
 - Cut out the **negative**. If you know or hear of users that are bad mouthing the system have the champion contact them and tell them to stop it.



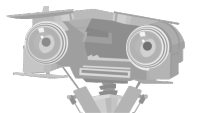
If your champion does not have authority, have them:

- Lead by **example**. If they're using the system and sharing with their peers and fellow users what great things they are able to accomplish because to the CRM, their excitement will be contagious and encourage buy-in.
- Be the voice of **encouragement**. If users are struggling to use the system or buy-in, have the champion reach out to them to encourage them to push forward and continue to use the system rather than give up on it or talk bad about the system.
- Provide **support**. They are likely a champion because they use the system well which means they can help other users learn or master the system.



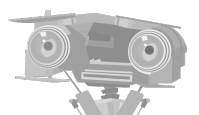
CRM Competitive Analysis Worksheet

Feature	Explanation	Cosential	Deltek Vision	Deltek Ajera
Cloud Based	Access database on any device with web access	✓	✓	✓
Outlook Integration	MS Exchange, Ethos plugin, full Outlook contact sync	✓	✓	✓
Project Management	Project Life cycle tracking	✓	✓	✓
Proposal Automation	Integrate accounting, project records to prepare marketing proposals	✓	✓	
Mobile Application	Add/edit, activities, contacts, opportunities. Search project records, mapping capabilities	✓	✓	
Work Flows	Trigger alerts/notifications to assigned users. Workflow assignments based on stages	✓	✓	
Personnel	Personnel module for resume data	✓	✓	
Publishing	Generate documents in Word or InDesign	✓	✓	
Reporting	Flexible reporting engine, no programming required	✓		✓
Email Marketing	Targeted email marketing campaigns based on contact mailing lists	✓		✓
Revenue Forecasting	Soft backlog revenue forecasting	✓		✓
FDC	Data Connector with an AEC Centric Accounting System	✓		
API/Integrations	Integration with all essential database systems through JSON Based API	✓		
Contact Management	Associate key relationships between personnel and contacts	✓		
Custom Fields	Customize, create or rename existing fields	✓		
Customer Success	Dedicated customer success rep for on demand assistance	✓		
Pre-Built Dashboard	Pre-built interactive dashboard widgets	✓		
Implementation	Implementation staff with AEC experience, background	✓		
Monthly Pricing Per User	Pricing per user	\$25, \$55, \$95	Hidden	Hidden
Spreadsheet-Like Interface	Editable spreadsheet-like user interface	✓		
Support	24/7 online, phone support; included in all plans at no added cost	✓		
Card Scanner Mobile App	Business card scanner to capture companies and contacts	✓		
Document Storage	Unlimited cloud storage of documents at no cost	✓		
Website				
Live Chat	Access to live support on website	✓	✓	✓
Contact Us Form	Submit help requests and trouble tickets	✓		✓
Searchbar	Quick search for records	✓		✓
Webinars	Regular training webinars	✓		✓

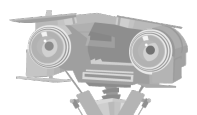


Checklist to Evaluate CRM Systems

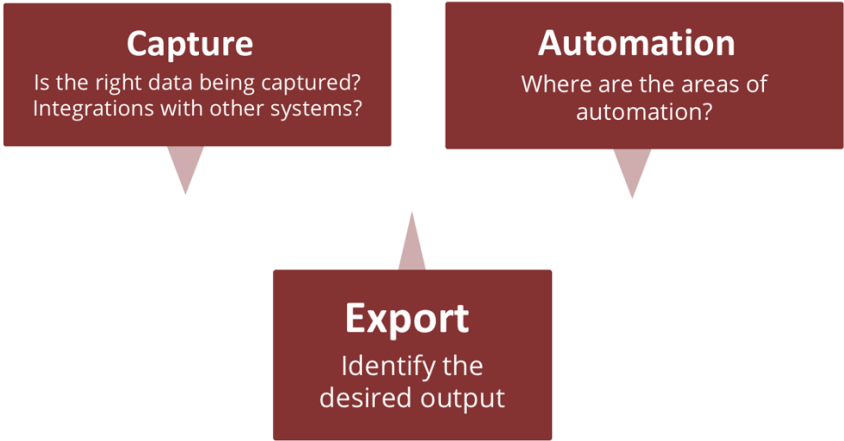
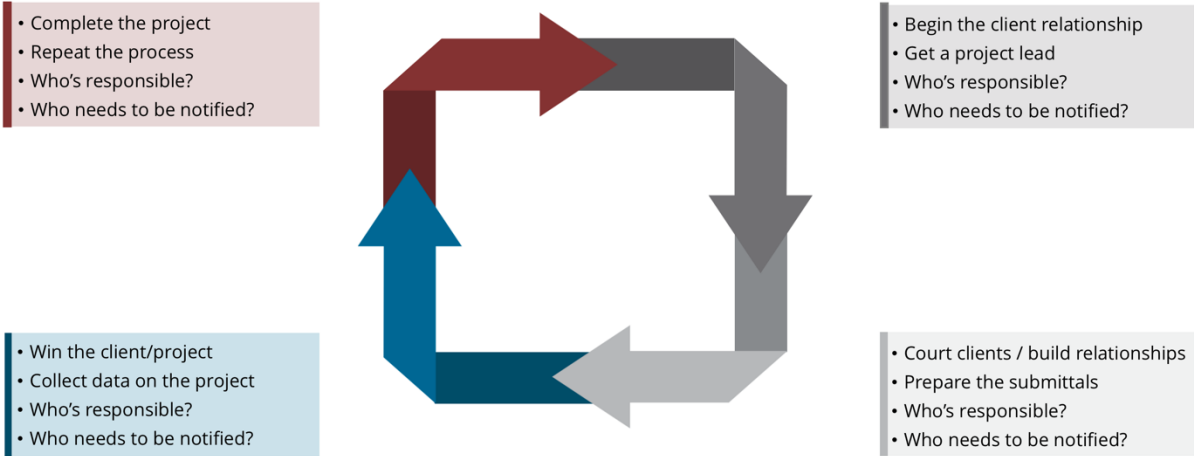
- Proposal Automation capabilities?
- Export templates in a specific format? (InDesign, Word, Excel, etc.)
- Can the system produce resumes? Handle tagging staff teams to projects? Can it capture resume information like education, years in the industry, etc.?
- Does it need to be built specifically for the AEC industry? (Project instead of product)
- Is the system user-friendly?
- Does the CRM need to integrate with other systems? (Financial, ERP, Outlook, Intranet, Mail Chimp, Constant Contact, Lead Service Source like IMS, Procore, etc.)
- Are you wanting just a contact management system or a full-service marketing system to handle contacts, leads and project data as well?
- Does the system have an API?
- Is a system being cloud-based important?
- Does it need to be mobile accessible? (Have a native app or browser accessible, be compatible with Android and iOS?)
- Will the system be able to reflect how your firm is structured? (Offices, Divisions, Service Lines, Profit Centers, etc.)
- Compatible with a card scan app or have their own?
- Do you want it to have a built-in email marketing campaign tool?
- Should it have an event management feature with registration tracking?
- What should the customization capabilities be?
- Do you have any requirements for the dashboard design, flexibility, capabilities?
- Have you identified what metrics you will want to report on so you know how a system needs to sort and filter your data?
- How user-friendly is the reporting interface?



- Are you wanting a system with tools for goal setting, forecasting, revenue and/or manpower projections?
- Most systems should have workflow notifications but how detailed are they and who much control do you have over customizing them?
- When new modules and features are developed are they included in your fee or is there an additional fee?
- Do they have established user groups?
- Is there regular online training or a regular conference?
- Is the company ranked by ENR or any other reputable third-party entity?
- How do they handle pricing? Is it per user or a lump sum? Are there upfront costs or hidden annual fees?
- Is there a storage size limitation? If so and it's exceeded is there an additional cost?
- What do their current clients say about them? Check out social media, software review sites like www.g2crowd.com and ask for references (be sure to call them). Ask the current customers:
 - What's the response time on support tickets?
 - How is calling into support?
 - Are enhancements heard or do they go to a blackhole?
 - If you have an issue, how is it addressed and resolved?
 - What made you decide to go with this CRM?
 - Are you still satisfied with the features you selected the CRM for and what keeps you satisfied with the system?
 - How long did it take you to implement?
 - Did you need a lot of assistance to get up and running or was it ready "out-of-the-box" with little to no learning curve needed?
 - What is their user adoption experience?



Process Mapping



Remember to...



Process Mapping Checklist

- Ask these questions for every step of the process:
 - **Responsibility.** Who is responsible for documenting the step?
 - **Notifications.** Should anyone be notified?
 - **Capture.** How are you capturing the information? (*scanning business cards, Word or PDF forms, Excel spreadsheets, etc.*) Are you capturing the right information for how you want to export and use it? Is this information captured in another system? (*Financial system, Project management system, etc.*) If so, can you access the data or integrate it into your process?
 - **Automation.** Can this be automated?
 - **Export.** Where and how will you be using this information and how often will you be exporting it?

- How does your firm get project leads? (*subscription services, referrals, repeat clients*)
- How does your firm begin relationships with clients? (*referrals, networking, tradeshow*)
- How does your firm build those relationships with clients? (*annual appreciation event, golf tournaments, newsletters, holiday cards/gifts*)
- How does your firm decide to go/no go a project lead? (*formal form, quick decision*)
- Follow the project pursuit through the entire proposal/submittal process start to finish, in detail.
- If the pursuit is lost or won, what happens? (*debrief as an internal team, with the client?*)
- If you win the project and gain a new client, are they welcomed in any way? When do they meet the project team they will be working with?
- What project data do you need to capture or verify at the start of the project? (*dates, dollars, references, scope, staff team, categorizations, project type, size, images, consultants – architect, GC, engineers*)
- What are the project milestones to verify project data? (*25%, 50%, 75%, Certificate of Occupancy, Topping Out, Turnover, Substantial Completion*)
- What is your close-out process when the project is complete? (*PIC/PM signs off on all project data, staff team is interviewed or narratives are written on innovative technologies used and other items asked in award submittals*)
- How do you continue to stay in touch with that client before their next opportunity, in the hopes that you start this process over again with their next project? (*Reach out at the year anniversary of them being in their space, send client surveys or leadership makes a call to check in with the owner*)

