Proposal Automation

What It Means and How To Get Started

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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	No
25 pts	0 pts

2. Do you have your proposal process and project lifecycle documented and mapped?

Yes	No
20 pts	0 pts

3. Does your firm have more than one office?

Yes	No
10 pts	0 pts

4. Do you have a significant population of your firm that is close to retirement?

Yes	No
10 pts	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	No
10 pts	0 pts

6. Is your leadership frustrated with updating resumes every proposal or complain about finding the same mistake in submittals?

Yes	No
15 pts	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	No
10 pts	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

25 – 55 points :: Semi Automated

Your firm is on the way and making progress towards proposal automation. You might have a CRM or a documented process, but it is not fully functional. If you have a tool, focus on the three main components (access, process and system) to get over the hurdles, challenges and into the mastery stage.

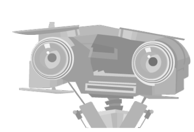
If you do <u>not</u> have a CRM system, see page 5 for a comparison of top CRM systems in the AEC industry. As well as a checklist to use while evaluating the options to find the best fit for your firm.

If you do <u>not</u> have a documented proposal and project lifecycle process, see page 8 for our process map and checklist to use while walking through the process.

If you <u>do</u> have a CRM system that is not fully functional or one that is not yet producing automated proposal, pause and review three main components.

1. **Access.** Do all of the people that need to be able to access the CRM have the *<u>correct</u>* access? Are your users accessing the system?
    a. You'd be surprised to learn how many of your users may not even be able to enter in some of the information they're capturing because they don't have the rights or access to key components of your CRM.
    b. Make sure you're doing an audit from time to time to ensure all of your users are accessing the system as often as they should per your process map responsibilities.

2. **Process.** Have you completed and/or reviewed your process map? If you're having problems with your system, the solution may lie in re-examing your process map and making sure everyone is on the same page.
    a. Is everyone aware of the process and how information flows in and through the system?
    b. Have there been new hires? If so, are they properly trained and have a clear understanding of their responsibilities?
    c. Is the process well documented?
    d. Are you reviewing your process often?



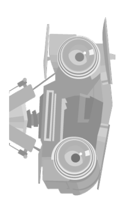
3. **System.** Are you using all the functionality of your CRM system? You'd be surprised how often the features and functions of the system aren't being used.
    a. Are you examining recent release notes for your system?
    b. Have you done a system audit to make sure you are using your CRM to its maximum ability?
    c. Are there any notifications to create to improve functionality? Emails triggers to users or logic triggers to set certain fields to a different value?

If you <u>do</u> have a documented process in place, take time to review it from all the different perspectives.

1. **Responsibility**. Who is responsible for documenting the step?
2. **Notifications**. Should anyone be notified?
3. **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?
4. **Automation**. Can this be automated?
5. **Export**. Where and how will you be using this information and how often will you be exporting it?
6. **Client Viewpoint**. From your client's viewpoint, thinking through their experience and interactions with your firm and your people.
7. **Data Viewpoint**. From the data viewpoint, are you capturing all the information you need for your end results (resumes, project sheets, etc.).

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	✓		✓



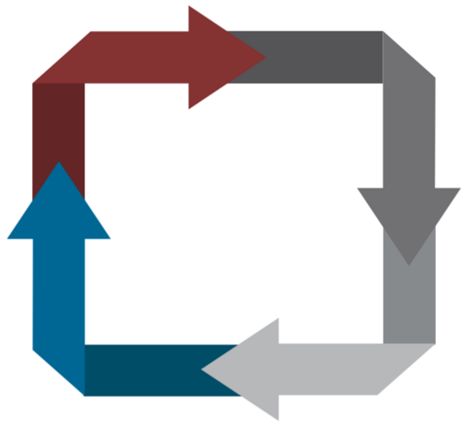
Checklist to Evaluate CRM Systems

- ☐ 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

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



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

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

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

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

Automation
Where are the areas of automation?

Export
Identify the desired output

Remember to...

Prioritize Your Goals

Review Your Map

Celebrate Your Wins

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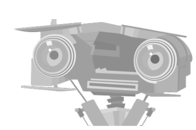

Process Mapping Checklist

- ☐ 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, tradeshows)*
- ☐ 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)*