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## CRM OPTIMIZATION

THURSDAY, AUGUST 23<sup>RD</sup>



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### COURTNEY KEARNEY, CPSM

Founder and Owner

- Wife, Mom & Data-loving Marketer
- Texas girl born and raised
- 20 years of experience
- Born into AEC
- Started using CRM systems in 8th grade during her first internship

## LEARNING OBJECTIVES

- Understand how to properly evaluate CRM platforms
- Discover what steps need to be taken prior to implementation
- Understand the right structure to support implementation success
- Discover solutions for collaboration and long-term success
- Learn how to remove the sting from typical training pains

## SMILE IT'S PICTURE TIME





## EVALUATE CRM PLATFORMS



## EVALUATION OF SYSTEMS

- Competitive Analysis Worksheet
- Checklist to Assist with Evaluation
- Survey/Research Results
- Supportive Material or “Ammo”

## 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	✓		
<b>Website</b>				
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 ASSIST WITH EVALUATION

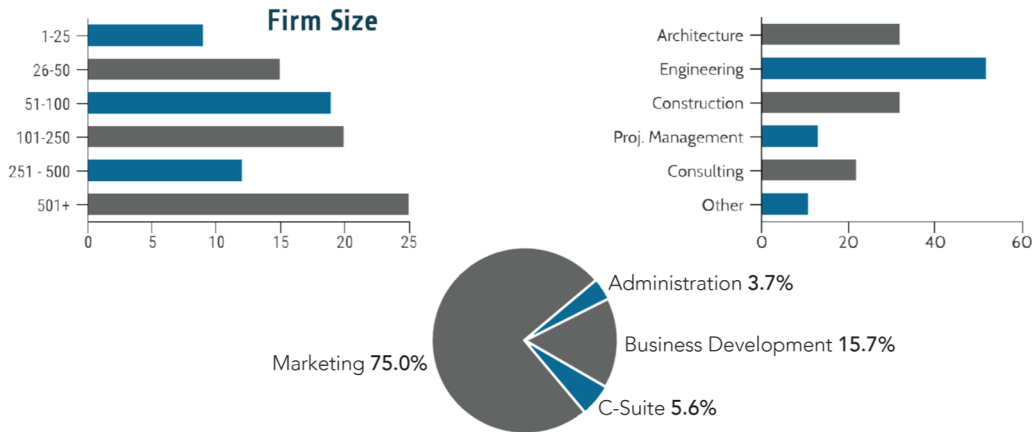
What's important to your firm?

- Does it need to be built specifically for the AEC industry? (*Project instead of product*)
- Proposal Automation capabilities? (*resumes, project sheets, project lists, etc.*)
- Does the CRM need to integrate with other systems? (*Financial, ERP, Outlook, Intranet, Constant Contact, Lead Service Source like IMS, Procore*)
- Are you wanting just a contact management system or a full-service marketing system to handle contacts, leads and project data as well?
- 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?
- 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?
- When new modules and features are developed are they included in your fee or is there an additional fee?
- Most systems should have workflow notifications but how detailed are they and how much control do you have over customizing them?
- Is there regular online training or a regular conference?
- Are you wanting a system with tools for goal setting, forecasting, revenue and/or manpower projections?

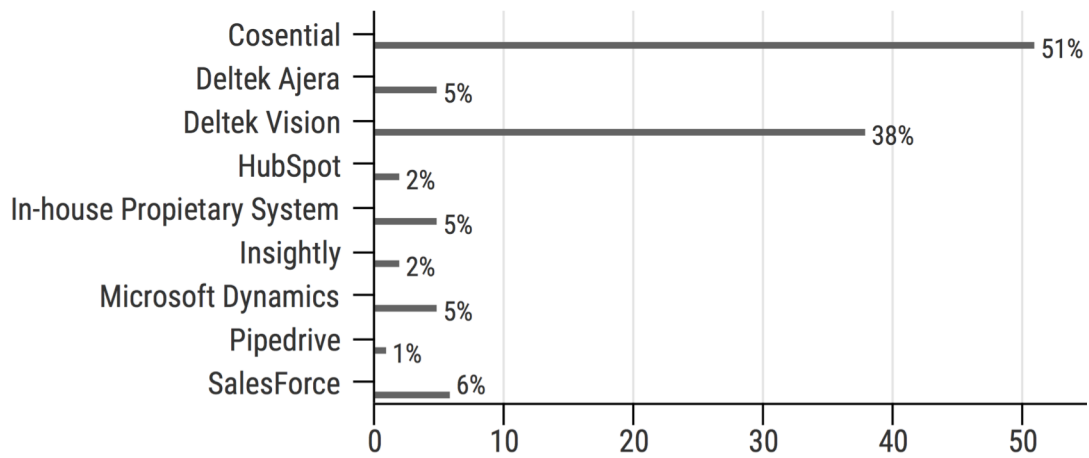
## MOST POPULAR SYSTEM?

In April 2018, we created a survey with several CRM related questions. We had over 100 people participate, the results are below:

### Respondent Demographics



## MOST POPULAR SYSTEM?



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## **SUPPORT MATERIAL OR “AMMO”**

1. Does your firm have more than one office?
2. Do you have a significant population of your firm that is close to retirement?
3. Has your company recently experienced losing a project pursuit they could have won if they were more organized or strategic with pursuing projects?
4. Is leadership frustrated with updating resumes for every proposal or do they complain about finding the same mistakes in submittals?

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## **PRIOR TO IMPLEMENTATION / RE-IMPLEMENTATION**



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All CRM efforts need to be in line  
with the main purpose of marketing and  
business development ...  
**winning** and **keeping** clients!

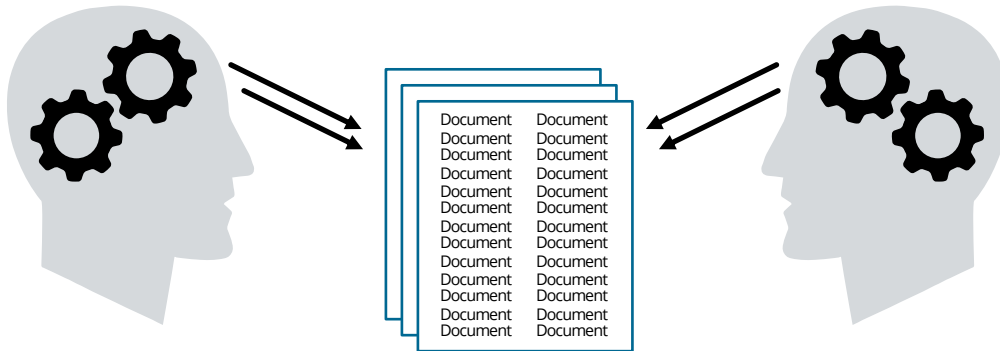


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#### PRIOR TO IMPLEMENTATION / RE-IMPLEMENTATION

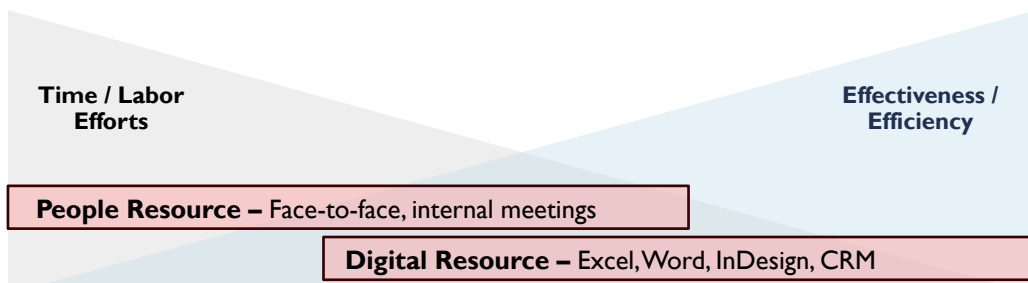
- Know your firm's why and how you will use it
- What are the benefits for your firm
- Who are your champions and users
- Build and nurture a culture of change

## FIRM'S WHY AND USE OF THE SYSTEM



## BENEFITS OF A CRM

- 1 Access to Centralized Data
- 2 Smart, Categorized Data
- 3 Effective and Efficient



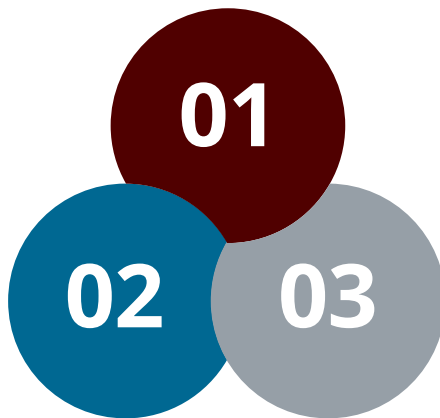


## IDENTIFY YOUR CHAMPIONS AND USERS

- 1 Champions
  - Influential, Non-Influential
  - No Champion
- 2 Responsible Department
- 3 Users



## BUILD AND NURTURE A CULTURE OF CHANGE



- 01 Slow down to go FAST  
Document and pay it forward
- 02 Actions are contagious  
Encourage others to join you
- 03 Market your CRM  
Campaign the change  
Communicate, communicate, communicate

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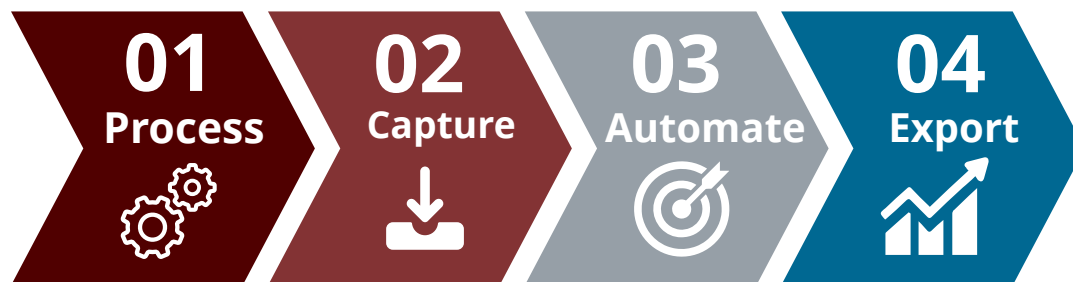
## STRUCTURE FOR A SUCCESSFUL IMPLEMENTATION

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## PHASES OF A SUCCESSFUL IMPLEMENTATION

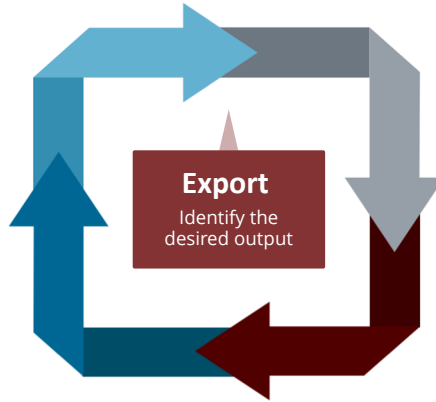


# Implementing the PA Phases

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

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

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



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

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

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

**Client Name** :: █ ISD  
**Opportunity Name** :: Additions to 3 High Schools  
**Geographic Location** :: Dallas  
**Business Unit** :: Dallas  
**Market Sector** :: Education  
**Proposal Due Date** :: January 11, 2018  
**Est. Selection Date** :: February 26, 2018  
**Est. Start Date** :: August 27, 2018  
**Est. Completion Date** :: June 07, 2019  
**Date Contract Signed** ::  
**Estimated Cost** :: \$18,900,000.00  
**Estimated Fee** :: \$0.00  
**P&P Bonded (Yes/No)** ::  
**Est. Size**: 75000  
**Deliverable**: RFQ/RFP  
**Contract Type**: Conventional (G/C)  
**Construction Type**: Expansion  
**Delivery Method**: CMaR  
**Staff Team**:

**Workflow Notification Example**  
Email sent to accounting when an opportunity is won

Personnel Name	Staff Team Role	Role Type	Involved	Description
██████████	Vice President	Executive	100%	

**Consultants:**

Role	Company	ID	Address	Phone Numbers	Company Type(s)	Comments
No companies have been associated with this project						

Link to opportunity record: <http://cosen.us/wNjYzMjk5MA==>

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**REMEMBERTO...**

Prioritize  
Your Goals

Review  
Your Map

Celebrate  
Your Wins

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**COLLABORATION AND LONG-TERM SUCCESS**



## COLLABORATION AND LONG-TERM SUCCESS



## MAINTENANCE AND AUDIT REPORTS

**ABD**

Always  
Be in your  
Data

Title	Time	Type
Maintenance Report :: All projects with no Staff Team	00:01	Projects
Maintenance Report :: All projects with no Completion Date	00:00	Projects
Maintenance Report :: All projects with no Cost	00:00	Projects
Maintenance Report :: All projects with no Architect	00:00	Projects
Maintenance Report :: All projects with no Size	00:00	Projects
Maintenance Report :: All projects with no Contract Type	00:02	Projects
Maintenance Report :: All projects with no Delivery Method	00:00	Projects
Maintenance Report :: All projects with no Firm Org	00:01	Projects
Maintenance Rpt:: Employee IDs	00:01	Personnel
Maintenance Rpt:: Personnel with no Image	00:01	Personnel
Maintenance Rpt:: Companies without Company Type	00:01	Company
Maintenance Rpt:: Contacts without Addresses	00:07	Contact
Maintenance Rpt:: Contacts with No Owner	00:17	Contact
Maintenance Rpt:: CMC Contact Owners	00:03	Contact
Maintenance Rpt:: Opps with No Firm Org Business Unit	00:06	Opportunity
Maintenance Rpt:: Opps with No Firm Org Client Opp Level	00:07	Opportunity
Maintenance Rpt:: Opps with No Firm Org Geographic Location	00:08	Opportunity
Maintenance Rpt:: Opps with No Firm Org Market Sector	00:10	Opportunity
Maintenance Report :: Contracted with \$0 - Open Opps	00:02	Opportunity
Maintenance Report :: Contracted with \$0 - Closed 06 - Contracted	00:00	Opportunity
Maintenance Rpt:: Companies and Contacts		Group Reports
Maintenance Rpt:: Opportunities		Group Reports

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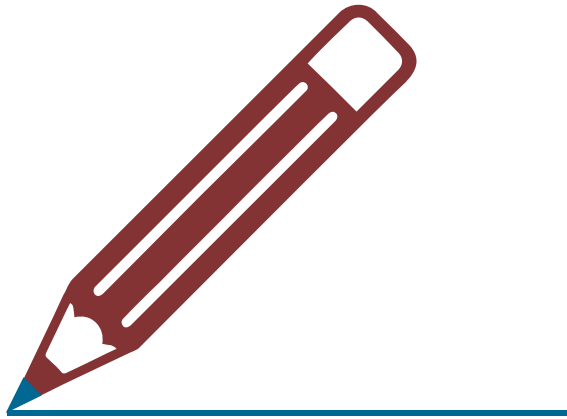
## CRM TRAINING



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## CONSISTENCY IS KEY

- 1 Stay Current
- 2 Keep CRM Top of Mind
- 3 Training Do's and Don'ts



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## TRAINING DO'S

1. **Consistency!** Having a standing monthly session over a brown-bag lunch or a standard time is important for continuity and for users to feel supported and confident.
2. **Clear Objectives.** Before the session share your training objectives and gain shared commitment to follow through and achieve them.
3. **Custom and Specific.** Training should be tailored to the audience whether it's based on their role or their skill level.
4. **Why?** Users need to know not only how the software works but how it relates to operational goals and processes. Tell them "why," not just "how."
5. **Champions.** Having your champions speak or present during training is powerful.
6. **Engaging.** If you have the ability to have each person on a laptop or tablet to be in the system and following along the adoption rate will increase.
7. **Q&A and Informal Chats.** It's not always easy learning new procedures and feeling comfortable with them, especially in a group. Make sure there are informal and private opportunities for engaging in discussion about training.

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## TRAINING DON'TS

### 5 Common Training Mistakes that Derail your CRM Success

1. **Little to no training.** Often, organizations don't train at all, or very little, because they assume that the software's going to be easy enough that their people are just going to get it, and understand it. That's a mistake; that's not how it works.
2. **Go-live only training.** Sometimes organizations train just at go-live. With training is going to be specific to the software, the same way that they might train Word or Access, and that's all the training that their users get.
3. **No training plan.** Even if a business delivers some level of good training at go-live, they don't have a plan for how their users are going to get better over time.
4. **No training validation.** Another big mistake that companies make, is not having a method for gauging whether the users are actually understanding CRM. They haven't rolled training out in a way that they can validate that the users actually understand.
5. **Training that is not role-specific.** We commonly see that businesses don't provide training that is specific to the person, to what they actually do in the organization. They might provide training, but its generic - the same for everybody, which won't drive you to the "best performing" category.

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Thank you for attending, please reach out and connect!