CRM Optimization

CKearney
Consulting LLC

CRM Optimization
Learning Objectives

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Evaluate CRM Platforms

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Evaluate CRM Platforms

Competitive Analysis Worksheet

CRM Competitive Analysis Worksheet

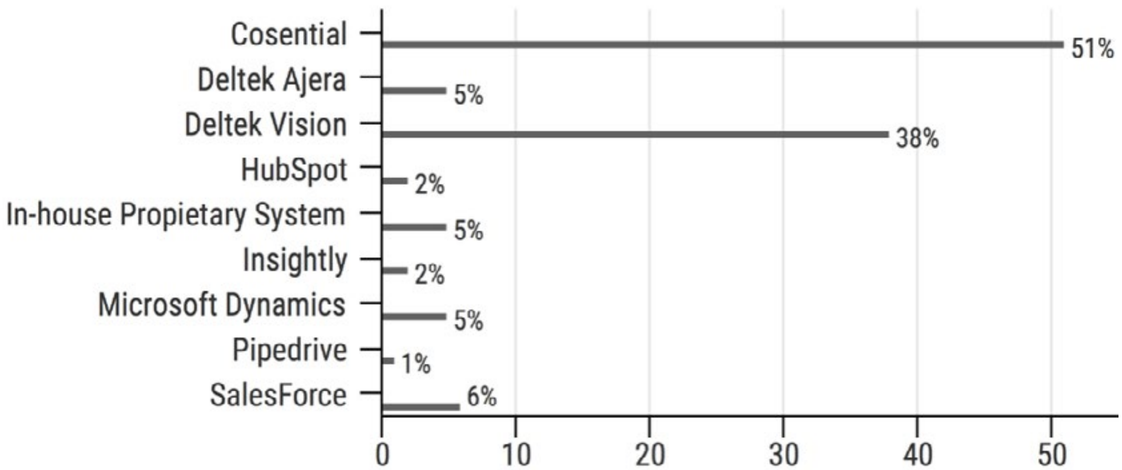
Feature	Explanation	Cosential	Deltek Vision	Deltek Ajera
Cloud Based	Access database on any device with web access	✓	✓	✓
Outlook Integration	MS Exchange, Ethos plugin, full Outlook contact sync	✓	✓	✓
Project Management	Project Life cycle tracking	✓	✓	✓
Proposal Automation	Integrate accounting, project 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	✓		✓

Evaluate CRM Platforms

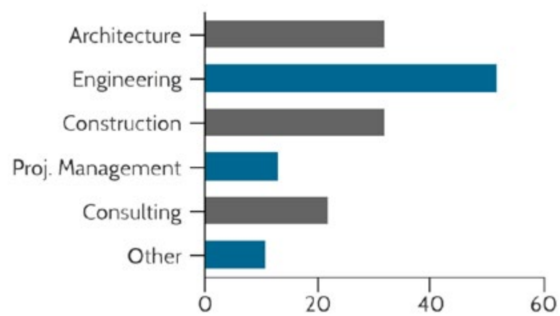
Research Results

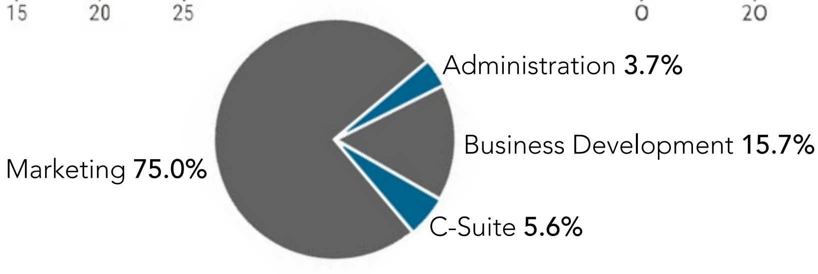
Most Popular Platforms?
In April 2018, we created a survey with several CRM related questions. We had over 100 people participate, the results are below:

Which CRM system do you use?



Respondent Demographics





Evaluate CRM Platforms

Checklist to Assist with Evaluation

What's important to your firm?

- Proposal Automation capabilities?
- Export templates in a specific format?
  (InDesign, Word, Excel, etc.)
- Can the system produce resumes?
- Can it 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, 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?
- 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 how 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?

Evaluate CRM Platforms

Support Material or "Ammo"

Does your firm have more than one office?

- A good CRM system can establish a workflow notification to communicate to personnel, based on geographic location, when opportunities have been created for increased efficiency and transparency.
- A centralized data source is key when managing multiple locations. It is no longer feasible to share one Excel file for all your pursuits.
- A single source of truth becomes exponentially more valuable when your staff is spread over a greater distance than a hallway.

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

- 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.

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 lake 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%.

Is leadership frustrated with updating resumes for every proposal or do they complain about finding the same mistakes 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 leadership's last updates.

CRM Optimization

Notes

Prior to Implementation/Re-Implem.

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Prior to Implementation/Re-Implem.

Prepare for your CRM

Set your CRM up to be successful by spending time positioning it's arrival, roll-out, implementation or re-implementation. Remember, at the end of the day, the main purpose of marketing and business development to **win and keep clients**. All our efforts with a CRM need to be in line with that purpose.

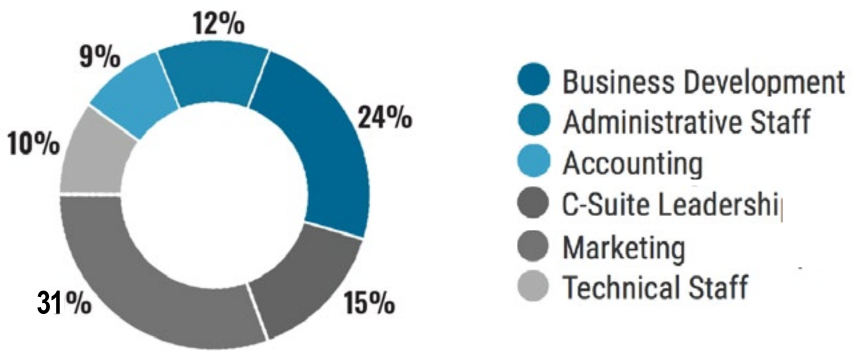
Winning and keeping clients is accomplished when we make what we do all about them — the pursuit effort is handled as a courtship, our submittals address their needs, fears and desires, we stay in contact throughout the project life-cycle, we celebrate the project completion and remain a trusted partner well after the project ends in the hopes they think of us and only our firm for their next project.

A successful CRM system comes along side this goal to **assist and optimize** your efforts.

Prior to implementation or re-implementation, clearly articulate and document the following:
1. Your firm's why and how you will use it
2. What are the benefits for your firm
3. Who are your champions and users
4. Build and nurture a culture of change

1 Your Firm's Why and Use of the System
Review the evaluation questions as well as the support material to fully know why you need a CRM or why your firm purchased the CRM to begin with and how they plan or planned to use it. *(see pages 2-5)* If these decisions are not **documented**, take the time to do that now. Pay it forward to yourself, your colleagues, the company and future employees!

We asked the survey participants who uses their CRM system, here are the results:



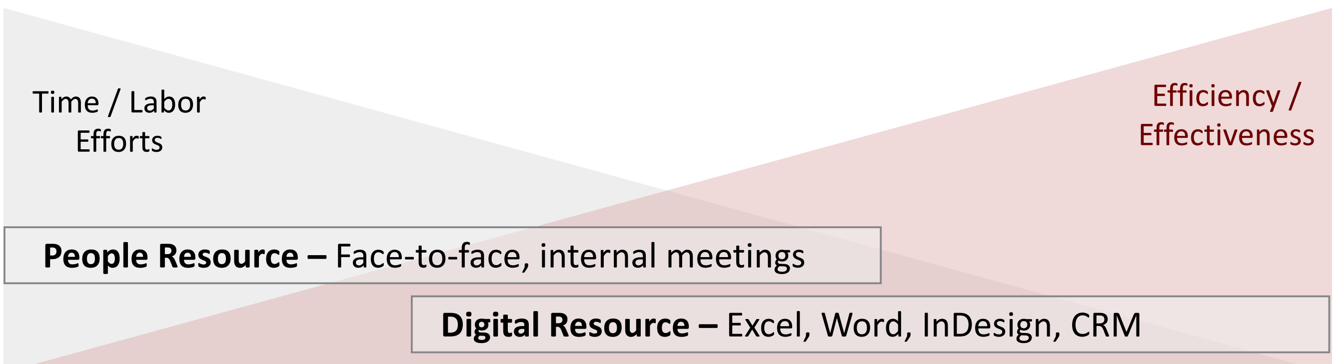
2 Know the Benefits of a CRM for your Firm

Included below are some of the universal benefits, however, you know your firm best and need to identify the benefits that are in line with your company goals and objectives.

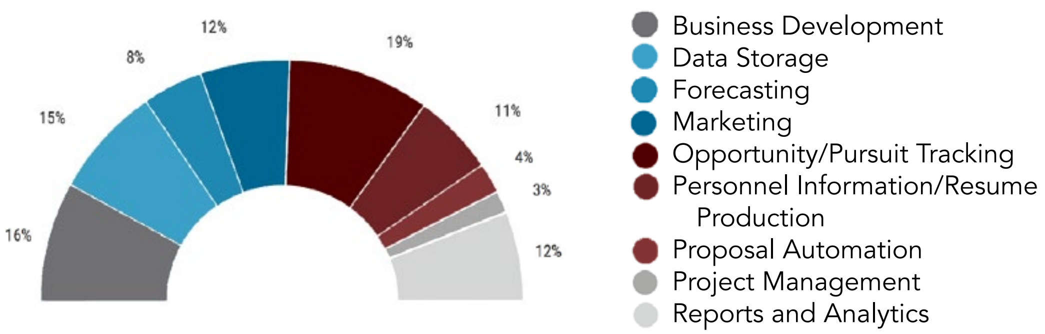
- Access to Centralized Data
  - » The information you gather is only valuable if the right people have access to it. Information kept in a dark corner with no-one reviewing or using it is worthless.

- Smart, Categorized Data
  - » "Smart data is digital information formatted so it can be acted upon at the collection point." *Definition according to whatis.techtarget.com/definition/smart-data*
  - » Categorized data is required for effective output. In order to know the total number of jobs your firm has done in a certain market, all projects must be tagged with a market.

- Effective and Efficient
  - » As the repetitive effort to look for and access data **decreases** so does your labor efforts to share information face-to-face and in meetings.
  - » Concurrently, your efficiency and effectiveness **increases** as you move to digital resources. You are able to have smart data that is categorized for multi-level reporting.
  - » Saving time, **saves money**!
  - » Increasing efficiency, increases productivity which in turn means **more money**!



We asked the survey participants how they use their CRM and which functions were most important to them. Here are the results:



3 Identify your Champions

To have the most successful CRM you will need at least one champion in an influential role backing your efforts to move the initiatives forward.

Once you have that champion on board:

- Have them lead by **example**. If they're using the system and sharing what great things they are able to accomplish with 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 old systems and spreadsheets are not allowed, 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, they can still be helpful and can:

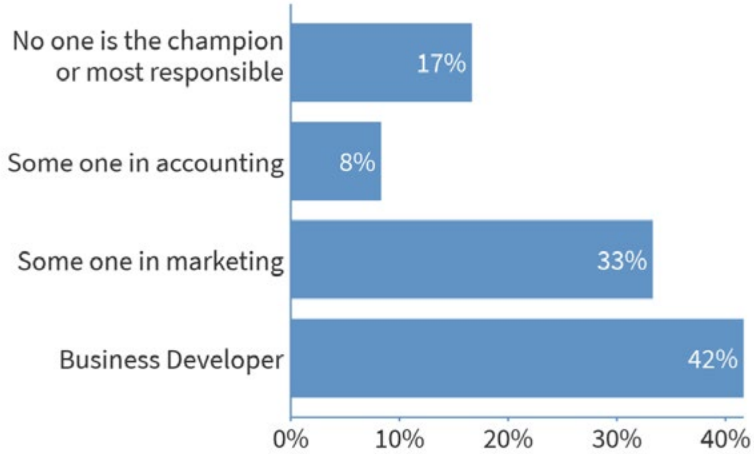
- Lead by **example**. If they're using the system and sharing what great things they are able to accomplish with the CRM, their excitement will be contagious and encourage buy-in.
- Be the voice of **encouragement**. If users are struggling to use the system or buy-in, have the champion reach out to 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.

If you do **not** have a champion yet, here are some ideas of how to develop one/some:

- Power Users. The people that have been asking to get a CRM are naturally going to be your power users and can easily be your champions. If you already have a CRM and need to revitalize your focus on the system and use of it, take time to watch who the frequent users are.
- Tech Savvy. Employees who are tech savvy that naturally adopt new systems can be your champions as they typically see the need and benefit with little to no convincing.
- The Office Influencer. Every office has that one employee or group of employees that influence the office. Tapping into that influence is powerful for CRM adoption especially if they are willing to be the hands-on supporters, the go-to for all questions and trouble-shooting. Better yet, if they help with training sessions or tracking what kinds of training users need.

3 Identify the Department Champion

Which department is most responsible for the implementation and success of the CRM? Clear responsibility needs to be determined so all parties are aware of expectations. According to a study we performed in April of 2018 where over 100 people responded to a survey, the common practice is to have marketing or business development lead the effort. However, you need to know what is best for your firm.



3 Identify your Users

It is important to know who will be using the system and how. To have the best user adoption and utilization rate, you need to customize the user experience. This can be accomplished by:

- Limiting what they have access to and allow only what is necessary for their role
- Ensuring they have the proper access (read-only, write, delete)
- Their first landing-page needs to be tailored to make their experience the most effective
    - Least amount of typing, clicking and searching
    - Having a recently viewed widget so the records they frequent are a simple click away
- Targeted training per user group
- Have an on-boarding process for new users based on their role

4 Build and Nurture a Culture of Change

Building a culture of change does <u>not</u> start at the top of your organization but rather it starts with **you**! It requires you to slow down to go FAST. Slow down, make a commitment to the process and doing things the right way. Do the work to know your firm's why, how your firm will use the system, what benefits it will bring your firm specifically, identify your champions, department champions and users. Most importantly document everything!

Once you are prepared, bring your champions into the loop and encourage them to join you. Remember actions are contagious so is excitement!

Now that your plan is well document, put your marketing strategy to work and market your CRM. Create a campaign around the benefits of your CRM, why the change and adoption of the system is necessary and what the users will gain. The key to this piece is to **communication**. Since everything is well documented communicate it to others.

CRM Optimization

Notes

Structure for Implementation

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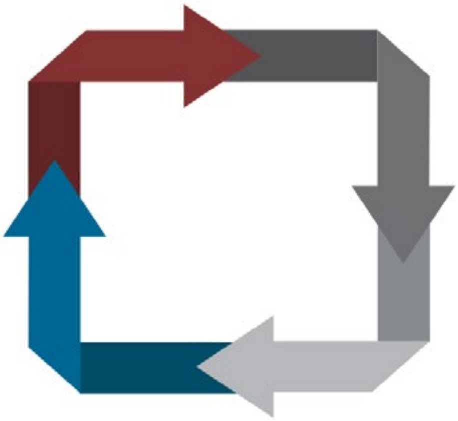
Structure for Implementation

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

Structure for Implementation

Process Mapping Checklist

"He who fails to plan is planning to fail." ~ *Winston Churchill*

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?

Process Checklist Items:

- 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)

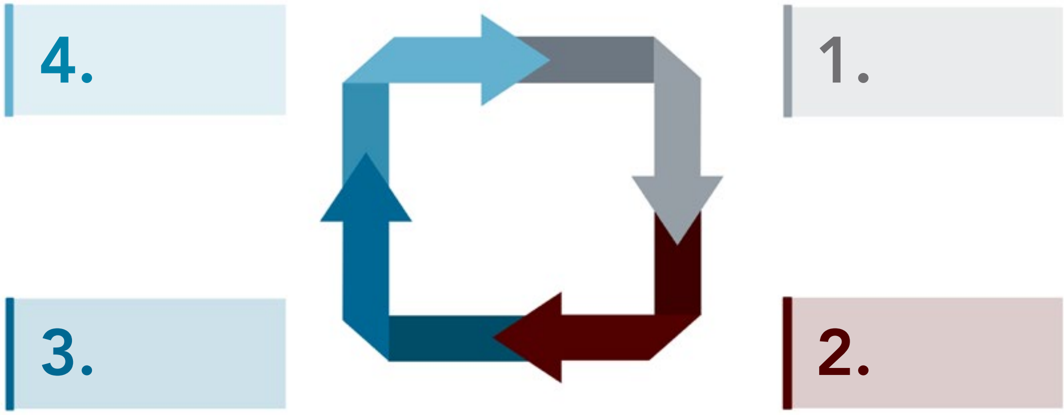
Notifications
Are there any notifications that could improve functionality? Email triggers to users? Logic triggers to set certain fields to a different value?

Here are some examples:

- Notification to accounting when a pursuit is won.
- Send the project completion report to the project lead to get project data reviewed and updated.
- Notify certain team members when a new lead or new client has been created.
- Tracking events or contacts in other platforms and/or medias through API integrations
- Automate the go/no go form
  - » Build the form in your CRM to be filled out and completed
  - » When the score is above a certain number a notification goes to a group of key decision makers
- Project alerts or reminders
- Pursuit approvals based on dollar value or other criteria
- Notifications when a certain event, call log or task activity occurs
- Automated project report with a set list of fields at project milestones
  - » At 25% complete send basic data (dates, dollars, scope, team) to be reviewed and confirmed
  - » At 50% send additional information (partnering team information, award narratives about innovative technology)
  - » At 75% send all information to be reviewed and completed
  - » At 100% complete the project lead signs of on all data
- If you have client account managers or champions, set a trigger to notify them if anything changes with the company record
- Date triggers on license registrations for the firm and staff to be notified x number of days prior to expiring

Structure for Implementation

Your Process Mapping



5. Capture **6.** Automation **7.** Export

Structure for Implementation

Your Process Mapping

CRM Optimization

Notes

Collaboration / Long-Term Success

Collaboration and Long-Term Success

Integration, Accountability and TEA

Collaborate through Integration

- What other systems, software or processes should your CRM be integrated with?
  - » Financial system
  - » ERP software
  - » Outlook
  - » Intranet
  - » Lead service source like IMS or JumpFactor
  - » Survey software such as Survey Monkey
  - » Email campaign tool such as Mail Chimp or Constant Contact
  - » Project management tool similar to Procore

Build Accountability into your CRM

- Review users adoption and usage during annual reviews
- Integrate compensation with CRM utilization for accountability
- Share data in real-time with everyone who needs it
- Gain company wide transparency and effective communication
- Stay on top of deadlines, goals and objectives
- Keep leadership informed quickly and efficiently

TEA — Track, Evaluate and Act

- **Track.** Report the metrics and information that is important to your firm
- **Evaluate.** Analyze the results and make any necessary changes to the process or system
  - » Use maintenance reports for data integrity, see following page for full list of example audit reports
- **Act.** For a CRM to be useful, users must track ACTION
  "Knowing is not enough; we must apply. Willing is not enough we must do." ~ *Goethe*
  - » Input data
  - » Use the system
  - » Rely on the CRM
  - » Distribute the reports
  - » Increase user adoption and buy-in
  - » Market the CRM and the change
  - » Celebrate the wins

Maintenance or Audit Reports

To maintain your automated process, remember to **ABD** (**A**lways **B**e in your **D**ata). Create Maintenance or Audit Reports and run them regularly.

Here are some examples:

- Resumes
  - » **Staff Team.** Look for projects *without* a staff team listed on a project.
  - » **Images.** Look for personnel records *without* an image.
- Project Data
  - » **Completion Date.** Look for projects *without* a completion date.
  - » **% Complete.** Projects *without* the fields populated you are using to calculate percent complete. (It's popular to use earned/billed so both need to be populated)
  - » **Cost.** Look for projects *without* cost fields populated.
  - » **Consultant Team.** Projects *without* an architect, engineer or GC team member listed.
  - » **Size.** Look for projects *without* the size field populated.
  - » **Contract Type.** Look for projects *without* a contract type.
  - » **Categories.** Look for projects *without* a category populated.
  - » **Firm Org.** Projects *without* a company structure selected (market, office, profit center).
- Integrations
  - » **Functioning.** Are you regularly checking if the integrations are firing and functioning?
  - » **Employee IDs.** Look for personnel records *without* an employee ID if your integrated systems are using that field to connect to your CRM.
  - » **New Records.** Review new records created to ensure your integrations are working if they are supposed to create new records.
- Clients
  - » **Company Type.** Look for records *without* a company type, if you are classifying company records with a type.
  - » **Addresses.** Records *without* address data, if that is important information to you.
- Contacts
  - » **Contact Type.** Records *without* a contact type, if you classify company records by type.
  - » **Addresses.** Records *without* address data, if that is important information to you.
  - » **Orphans.** Look for records *without* an internal staff member listed as an owner.
  - » **Emails.** Look for records *without* an email addresses, if that is important data to you.
- Opportunities/Pursuits
  - » **$5 or less.** Look for records with the value less than a certain amount to catch when users just enter a $1 to get past the required field.
  - » **Closed Opps.** Review closed records for fields needed for other systems or modules.
  - » **Hit Rates.** Know what kind of hit rate you want to report on and ensure those classifications are populated (won/loss, interviewed, shortlisted, hit rate by category)
  - » **Date.** Look for records *without* the date populated if workflows trigger off the date.
  - » **Cost.** Look for records *without* cost fields populated.
  - » **Consultant Team.** Look for records *without* an architect, engineer or GC whatever team members you track on your projects.
  - » **Size.** Look for records *without* the size field populated.
  - » **Contract Type.** Look for records *without* a contract type.
  - » **Categories.** Look for records *without* a category populated.
  - » **Firm Org.** Look for records *without* a selection tied to your firm org or company structure (market, office, division, profit center, services).

CRM Optimization

Notes

CRM Training

CRM Training

Consistency is Key

"Tell me and I forget, teach me and I may remember, involve me and I learn."

~ Benjamin Franklin

Training Yourself to Stay Current

Your CRM system should be ever evolving and improving. To keep your system current:

- Who is staying on top of new releases and determining which new features to implement?
- Are you using all of the functionality in your current CRM system?
- Do you track release notes from your CRM provider?
- Audit your system regularly to make sure you are using it to its maximum ability.

Keep it Top of Mind

Quick tips and tricks via newsletter or email. Some have just text with a screenshot, others might include a short video or attached instruction page

- How to move a contact record to a new company
- How to create a new opportunity
- Importance of entering an owner for a contact record
- Explanation of how data is used and why it's important to accurately enter data

CRM success is dependent on how well people use it.

Effective training leads to increased user adoption and contributes to success. So what do you need to have successful CRM training that translates into bankable results?

- 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.
- Clear Objectives. Before the session share your training objectives and gain shared commitment to follow through and achieve them.
- Custom and Specific. Training should be tailored to the audience whether it's based on their role or their skill level.
- 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."
- Champions. Having your champions speak or present during training is powerful.
- 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.
- 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.
- Food! Having food helps attendance and engagement whether it's a brown bag lunch, snacks in the afternoon or liquid courage to attend. Some companies have CRM training over happy hour and have "Learning Libation Sessions".

Training Session Ideas.
Here are some typical sessions others are training users on:

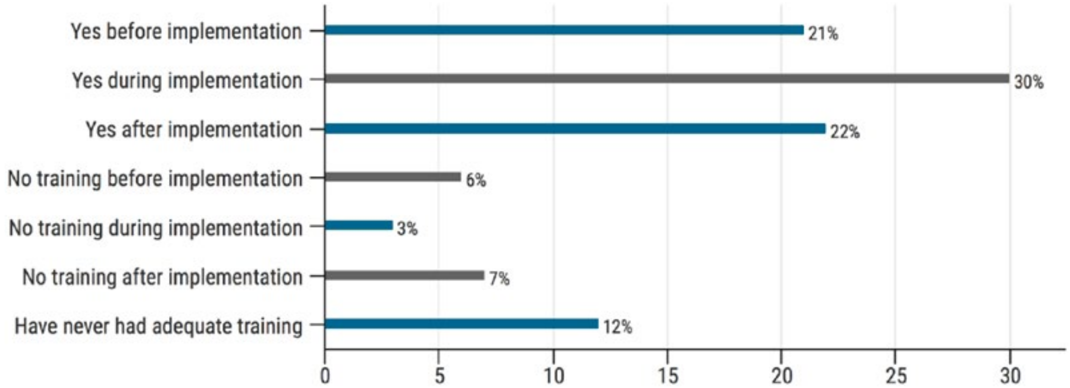
- On-boarding new users with training material included in their welcome packet or they have time allotted for a one-on-one introductory session
- Refresher overview sessions every quarter
- Sessions focused on contact management
- How to create records (contacts, companies, opportunities, call logs)
- What users are not doing well or correctly
- What's new with the system
- Focus on going deep with one or two topics

5 Common Training Mistakes that Derail your CRM Success
According to Patrick Lewis with Edgewater Fullscope, the five most common training mistakes organizations make that keep them from becoming a high performing organization are:

- 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.
- 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.
- 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.
- 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.
- 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.

See full article at *https://blog.fullscope.com/blog/avoid-crm-failure-training-plan*

Survey Agrees
The survey we performed in April shows that about two thirds of the participants performed training before, during and after implementation. The other one third had little to no training.



CRM Optimization

Notes

Thank you for attending