SPEAKER PROFILE

COURTNEY KEARNEY, CPSM

FOUNDER AND OWNER
CKEARNEY CONSULTING

"I cannot recommend Courtney Kearney enough; her CRM classes are well thought out, insightful, and she provides you with fact to take back to the office. Whether you are looking for evaluation tips, implementation or how to better utilize what you have – Courtney's CRM classes can help you achieve your goals."

~ Paula Elder, SMPS Houston Education Director 2018

COURTNEY KEARNEY, CPSM

MOM & DATA-LOVING MARKETER

Known for her love of data, Courtney brings her marketing skills and years of experience to a technical world of databases, processes and numbers. She is a CRM thought leader; writing white papers, leading roundtables and giving presentations at local and national conferences.

With over 18 years in the A/E/C industry, Courtney's experiences are many and her knowledge vast. After spending 10 years as a marketer of construction and engineering firms she branched out and created her own consulting firm focused on Client Relationship Management (CRM).

CKearney Consulting exists to provide quality services to our clients so that they can live the working lifestyle they want, free from the stress of a CRM system.

Click [here] to read more

WHAT TO KNOW ABOUT CRM

SESSION DESCRIPTION

Dive into the world of CRM (Customer Relationship Management) from evaluation, implementation, to long-term management. A successful CRM incorporates all departments through effective communication and an outlined process. As is true with all technology, it should work for us not put us to work for it. Learn how a proper CRM system can be the solution for interdepartmental collaboration and increased efficiency.

LEARNING OBJECTIVES

1. Learn how to properly evaluate which CRM platform is best for your firm
2. Discover what steps need to be taken prior to implementation
3. Build the right structure to support implementation success
4. Remove the sting from typical training pains
5. Incorporate all departments for long-term success

SESSION FEE

This topic can be delivered in a 1-2 hour session, free of charge. A half day workshop going deeper into the topic is available for a fee. The terms of the fee will be negotiated per event.

"A lot of takeaways to help me advocate for change at my firm. I think was a good topic for every level, from where to start up to how to maintain a CRM."

~ Workshop Attendee

PROPOSAL AUTOMATION
WHAT IT MEANS AND HOW TO GET STARTED

SESSION DESCRIPTION

Gathering crucial data points when putting together your proposals can be a time bandit. The data-gathering process can make or break your sanity, creativity, and success unless you have a tool or method of organizing your firm's portfolio. If you're struggling to get your CRM or content database working for you so you can make better proposals, this session is for you. Regardless of your current software stack, this session will help you understand how this process works and what best practices are used in top firms.

LEARNING OBJECTIVES

1. Learn what proposal automation means and how it translates to time savings and efficiency
2. Discover the core components of proposal automation
3. Gain strategies to optimize your proposal process
4. Understand how to catch up and overcome years of data silos

SESSION FEE

This topic can be delivered in a 1-2 hour session, free of charge. A half day workshop going deeper into the topic is available for a fee. The terms of the fee will be negotiated per event.

"Was scared of PA, now I'm a fan!"
"We're looking for a CRM and this helps make the decision."
"Loved this interactive session!"
"Great information, I look forward to using the strategies."
"Two words, Love This!"
                    ~ Workshop Attendees

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COSENTIAL OPTIMIZATION

SESSION DESCRIPTION

Dive into Cosential and discover tips, best practices, and uses of the system to optimize operations. In this three-hour training, participants will review the core functionality of Cosential including a complete picture of how to best track your firm's connections, interactions and history with clients.

LEARNING OBJECTIVES:

1. Enhance your use of each of Cosential's core modules
2. Build a customized dashboard that impacts your firm
3. Maximize the use of workflows for efficient communication
4. Learn how to maintain and protect your data integrity
5. Obtain best practices and tips to improve your experience
6. Review new features and how to best capitalize them

SESSION FEE

This topic can be delivered in a 1-2 hour session, free of charge. A half day workshop going deeper into the topic is available for a fee. The terms of the fee will be negotiated per event.

"I liked that the workshop was catered for our industry as well as the group-learning afforded through the attendees sharing of experiences."
~ Workshop Attendees

CKearney
ConsultingLLC

BUILDING A VIRTUAL ENVIRONMENT
FOR INCREASED PRODUCTIVITY & TALENT RETENTION

SESSION DESCRIPTION

Having a virtual team is no longer a thing for other industries. It is becoming more popular amongst our AEC community. Not only are business owners looking for more efficient ways to operate but focus has also shifted to retaining top talent. Our people is what differentiates us from our competitors!

LEARNING OBJECTIVES:

1. Definition and Description
2. Blueprint for Building your Virtual Team
3. From Concept through Implementation
4. Consider and plan for challenges up front
5. Productivity & Results for long term success

SESSION FEE
This topic can be delivered in a 1-2 hour session, free of charge.

"I think having a virtual team is redefining reality and helping our team change their realities. That's one of the main reasons why I joined CKC. I have gained a level of autonomy and flexibility in my life that I have never experienced before. My reality has indeed been changed working in this virtual environment."

~ CKC Project Member

STRATEGIC MARKET ANALYTICS

SESSION DESCRIPTION

This session will show you the power of market analytics and how to utilize industry market data for strategic planning purposes. Important elements of business projections and planning are knowing where the industry is headed, understanding your company's market share and profitability history.

Analytics combine both data sets to show the best long-term markets for your firm. Hopefully, historical data is being maintained in the CRM system and you can use the data and also upload your analysis and findings back to the system.

LEARNING OBJECTIVES:

1. Learn how to perform data analysis to discover your firms market share
2. How and where to find historical data for your industry
3. Forecast trends for strategic market pursuits

SESSION FEE

This topic can be delivered in a 1-2 hour session, free of charge.

"It is a true value to know that someone is on top of our data. They are proactive on bringing information to our attention that needs to be addressed if there is an issue with our system or data."

~ CKC Client

REFERENCES

Jenifer Batchelder, CPSM, Marketing Manager
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PAST SPEAKING EXPERIENCE

June 2018 – Present	National CRM Users Group – Monthly Facilitation
September 2018	CRM & Cosential Optimization Workshop in Chicago
August 2018	SMPS Houston – What to know about CRM?
August 2018	SMPS Build Business – Mind Exchange: CRM Roundtable
July 2018	CRM & Cosential Optimization Workshop in Minneapolis
July 2018	SMPS Learning Lab Webinar: Proposal Automation - What it Means & How to Get Started
June 2018	SMPS Fort Worth: Develop a Client Retention Plan: How to Keep Clients Coming Back for More
April 2018	SMPS Southwestern Regional Conference: What's All the Buzz About CRM?
January 2018	ELEVATE Workshop
July 2017	SMPS Build Business – Mind Exchange: CRM Roundtable
July 2017	SMPS Build Business – Streamlining Proposals & BD Processes with Cosential
October 2016	Cosential WOW Conference – A Day in the Life of a Cosential Marketer
October 2016	Cosential WOW Conference – Beyond Implementation: Training, Communication, Data Integrity
October 2016	Cosential WOW Conference – Roundtable Leader: Implementation 2.0
July 2016	SMPS Fort Worth Summer Bootcamp: Illustrator
October 2014	Cosential WOW Conference – Roundtable Leader: Re-envisioning Cosential
August 2014	Cosential Training for KBE Building Corporation
July 2014	SMPS Fort Worth Toolbox Series – Evaluating ROI
April 2014	2-Day Cosential Summit with Seven Construction Companies
April 2013	Cosential WOW Conference – Panelist
April 2013	Cosential WOW Conference – Roundtable Leader: Communication & Training Strategies
January 2013	SMPS Fort Worth Education Program – Data Management
May 2012	Cosential WOW Conference – Roundtable Leader: Increasing CRM User Adoption

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