

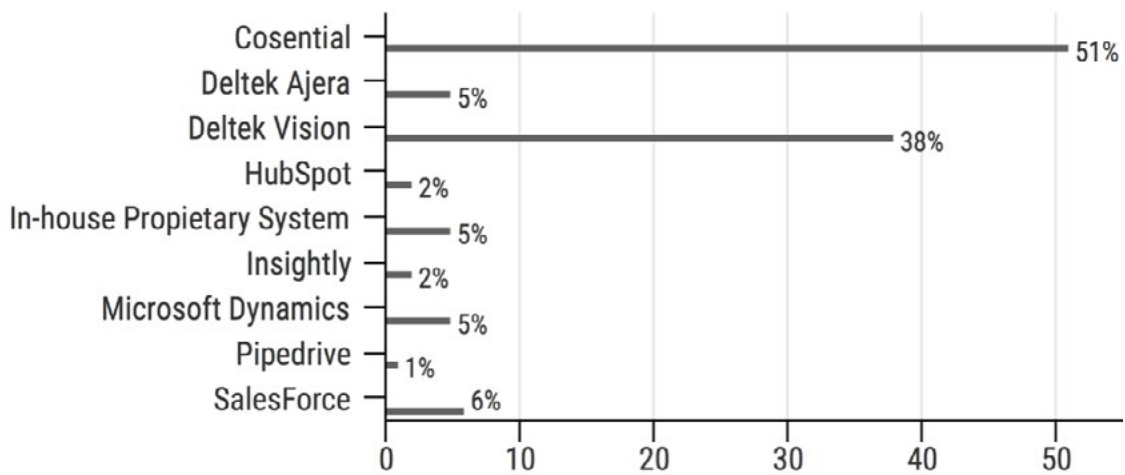
# Evaluate CRM Platforms

## Research Results

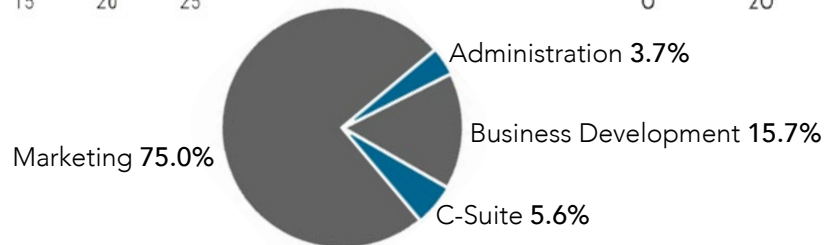
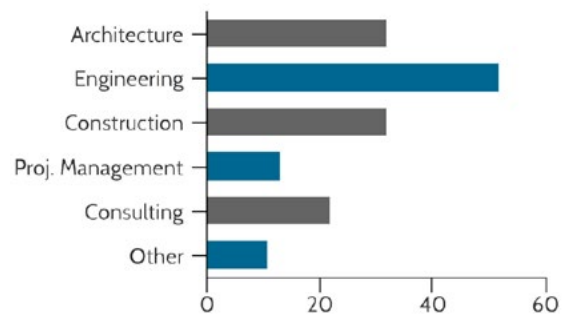
### Most Popular Platforms?

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](http://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 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%.

### **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.