

Strategize your plans for the future

SOLUTION OVERVIEW

Challenge

Most of your business comes from your relationships; even gross margins are increased up to 7% at high trust companies, where 4 out of 5 projects are for repeat customers.¹ So, when it comes to winning work, why does remembering what matters to each client leave you struggling to tailor responses to best position your firm?

Forget being strategic if the place where you create and house your capture plan is disjointed from any system recording contacts and active pursuits. Aggregating and analyzing the data you need to prove you're on track is next to impossible—especially if a financial system alone is where reporting stays. Why? Those systems are just receivers, with no capabilities to house key data tied to actually winning projects.

It's been said before: relationships and partnerships are what drive construction projects. Don't starve your firm by keeping those critical components in tribal knowledge and old email threads.

Solution

Strategize how you capture new work. Numbers talk, but what does their story convey at a glance? Help your team visualize goals and progress by centralizing reports and serving them within easily consumable dashboards. You need a software solution that expedites your overall pursuit goals by streamlining reporting and promoting execution of in-depth capture plans.

Master the way you win business with the relationships you've built, nurtured, and protected by leaving manual data entry and tech gaps in your process behind. You need a software solution that doesn't fall short of connecting to other areas of your business to truly get the full picture.

Set your Business Development team up for success by pulling your data into a single source of truth to easily show leadership that you're on track, so you never lose sight of your overall firm goals.

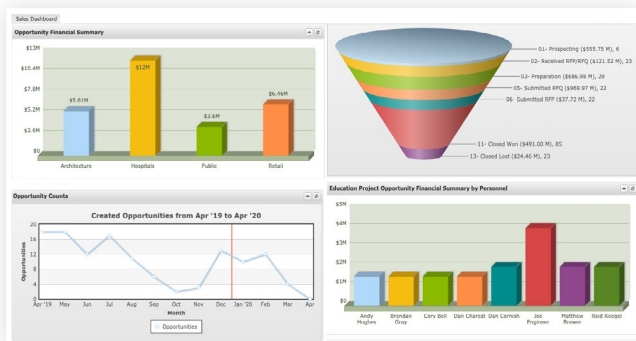
¹ Autodesk + FMI

How we do it

Unanet CRM by Cosential is the only growth platform that goes beyond a CRM in owning the pre-sales process for market leaders winning business in the AEC industry. We are your catalyst for change.

Strategize how you capture new work

- Build a meaningful account plan with details like SWOT analysis and success factors that are key to winning work.
- Drill down into open opportunities to view the entire breadth of work; including all the projects you're chasing with a company.
- Clean critical success drivers tied to your accounts in one spot.



Keep a constant pulse on the state of your business with centralized reporting

- Display only the data you need by generating reports using multiple filters, sortings, and groupings.
- Run reports with simple grid column outputs, visual graphs, or simply export to Excel.
- Supercharge reporting through easy connection to other analytic tools, like PowerBI.

Get the full picture — easily connect to your financial system

- Securely sync your project-specific marketing and financial data.
- Gain easy access to updated projects, personnel, and more.
- View all projects and past pursuits with a client to pair with current sales activities.

Sub-Project Summary Information									
Project Name: Big Stadium					Project Number:				
Marketing Project: Yes					Publish to Web/In: No				
Project Address: Austin, TX 78701					Client Name: Green Mountain Companies, Inc.				
Data Approved: Yes					Owner Name: U.S. Department of State				
Project:					Reason(s) Not Published:				
Project Performance									
Earned					A/R				
Billed					A/R Past 60 Days				
Unbilled					P&L				
Paid					% Gross Margin				
Fee Remaining					% Complete				
Subconsultant Contracts									
ID#	Company Name	Role/Service	Contracted Fee	MBE	WBE	DBE	8A		
63216	ACME Architects	ADA Design Consultant		TBD	TBD	TBD	TBD		
	ACME Construction Company	ADA Design Consultant		TBD	TBD	TBD	TBD		
3456	Populous	Architect		TBD	TBD	TBD	TBD		
	Target Architects	Theatre Planning	\$5,678,999.00	No	No	No	No		
			\$5,678,999.00						

Where Information Means Insight

Unanet is a leading provider of ERP and CRM solutions purpose-built for Government Contractors, A/E, and Professional Services. More than 3,200 project-driven organizations depend on Unanet to turn their information into actionable insights, drive better decision-making, and nurture business growth.



unanet.com