

Construction CIOs

YOU CAN PREVENT CRM IMPLEMENTATION FAILS EARLY WITH THESE THREE STEPS

There's nothing more frustrating than going through the process of evaluating a new technology partner, only to make a decision that results in a costly, time-consuming implementation with no adoption. No one is in the market for expensive shelf-ware. Read on to learn more about how your role can impact the overall success of a CRM implementation early-on.



Your role is as crucial as technology itself.

Technology is an integral part of every organization, no matter the size or industry. It's preached again and again that organizational health is dependent on three key areas: People, Process, and Technology.


Chief Information Officers (CIOs) play a large part in these businesses helping the firm make healthy choices in terms of the technology they are using along with the people and processes to support that technology. So why are so many CIOs left out of important Customer Relationship Management (CRM) conversations?

Gartner Research reports that **over 50% of CRM projects** have failed over the last 15 years. A lot of that can be attributed to the lack of participation the technology leaders of an organization have with the implementation and evaluation process. When you break that down into both monetary and time currency, you're looking at billions of dollars wasted on what should be a net-positive tool.



Most leaders would agree that change management needs to occur from the top down. The leaders of any organization need to be bought into the idea of requiring adoption of the tool in order to see full effect. However, historically in the Architecture, Engineering, and Construction (AEC) industry, individual contributors down to the admin level are being tasked with spearheading the adoption of new technologies and show value upstream. This often results in siloed data, limited adoption and ultimate failure.

Unanet believes a disruption to this pattern needs to occur in an effort to improve implementations, overall firm adoption, and effective use of all new technologies, including the use of CRM and Proposal Automation solutions. We believe this disruption needs to be driven by the leaders in your technology organization..



**That's why we're
calling on you, the
information and
technology leaders in
major Construction
firms, to drive real
change.**

But we don't expect you to do it alone.

Here are the first three steps you can take to empower your department to prevent yet another CRM implementation fail and be a part of a new statistic, the firms racing to win back the estimated \$1.6 trillion dollars left on the table due to the lack of digital transformation in AEC firms worldwide..

Step #1

Find a Champion

Remember when we mentioned that technology is one of three major drivers in organizational health? And that your role will touch all three? Keep that in mind through this entire process. CRM change management is not just a change in platform, it's a change in people, processes, and focus. Whether you're currently using a CRM and evaluating a new tool that can better fit your needs, or you're moving from a homegrown system, it's entirely possible that you will need to reevaluate who will own what aspects of the new tool, new processes, and what the focus is for the tool. Unanet has statistically seen an increase in successful implementations when working with firms who have a dedicated Process Champion. One person who manages the users, processes, operations and data maintenance for the firm. At some of the healthiest and largest firms, this person reports directly to the IT department.





Step #2

It's All About Relationships Especially in Construction

CRMs are historically a Customer Relationship Management tool—as such, everything your tool accomplishes should be centered around those customers and relationships. From the evaluation process all the way down to implementation, you should be thinking about your Customer Journey and what you need this tool to accomplish for you in order to better manage, service, and support your relationships.

Unanet understands that the Construction industry sells projects, not products, and therefore CRM is only one area of the overall growth and relationship management strategy for the firm. When looking at the system as a whole, it's important to remember that relationships drive your entire firm—not just the business development side. Without this compass, it's easy to lose sight of business goals during the implementation process which can lead to costly failures down the line.



Step #3

Use the Right Tool for Multiple Jobs

We've all been attracted to lower price tags, shiny bells and whistles, and the newest innovations—but sometimes these tools require a secondary check-in that begs the question, “Will this tool accomplish everything I need? Or will I eventually need to implement more technology and customizations in order to make it work?” It's important to leverage more than one capability baked within the CRM system you're implementing. When more than one customer perspective is captured within your CRM, the richness of the data collected is significantly increased.

With that said, it's also important to leverage the breadth and depth of the product in how it can affect multiple areas of your business.

For example, Unanet CRM by Cosential allows your marketing and business development teams to have a single source of truth that makes proposal building, past project performance reporting, and bidding an effective and time-efficient process.



Whether you choose to evaluate Unanet CRM by Cosential or another leading CRM, it's important to keep these three steps at the forefront of your mind through the implementation process. CRM systems are a technology, however CRM encompasses more than just the tool. CRM is both a process and a philosophy that is supported by a system. The IT department is in an ideal position to align the entire organization for success through this process.

These three steps are only the beginning to a potentially long and winding process. Don't allow yourself to be overwhelmed by the timeline. Arm yourself by understanding the Sales and Marketing roles in CRM and leaning on resources like Unanet. As the only project based CRM built exclusively for the entire AEC industry, created 20+ years ago, we've seen your challenge before and are prepared to support you through the entire process from start to finish.

Get ahead of the curve. Book a demonstration of Unanet CRM today to understand why it will ignite your Marketing and Business Development teams to be stronger and more efficient than ever — backed by the power of data.

Meet your Team.