

For AEC Firm UMC, a Lightning-Fast CRM Implementation Produces Positive Results Just as Quickly

CASE STUDY

For UMC, a century-old construction firm known for taking on some of the most complex, ambitious and challenging projects in the business, from Seattle's Space Needle to Amazon's Spheres, there's no settling for "good enough."

That standard applies not only to the quality, aesthetics and safety of the built environments UMC creates, but also to the systems its people use to manage and grow the business. And it's why UMC's leadership decided in late 2020 that it was time to move away from the clumsy, outdated and ill-fitting generic customer relationship management (CRM) product the firm had been using, to a CRM solution more befitting a progressive, growth-minded and customer-focused enterprise.

"It was far from an elegant solution for a lot of the things we were trying to do," Bob Frey, UMC's Director of Sales and Operations, says of the big-brand, off-the-shelf CRM product the firm had been using for about six years.

Sticking with the legacy CRM product became untenable for the firm due to:

- An unreasonably high cost to maintain it. UMC needed a dedicated full-time employee just to administer the system, along with a third-party provider to develop a custom overlay that Frey acknowledges never really mapped to the firm's needs.
- Instability. The system and overlay were plagued by frequent freezes, crashes, etc. Whenever the base system was updated, many of the customizations would need to be rebuilt.
- A frustratingly disjointed and glitchy user experience translated into low user adoption/engagement.



ABOUT UMC, INC.

Founded as a mechanical contracting company more than a century ago, in 1920, UMC (www.umci.com) is an integrated, multi-discipline construction firm that has planned, designed, built and managed some of the most iconic projects in the U.S. Pacific Northwest, including the Space Needle, the Columbia Center, the Museum of Glass and the Amazon Spheres, all in the Seattle-Tacoma area.

Based in Mukilteo, Wash., UMC specializes in design-build mechanical contracting, energy, facility service and manufacturing, serving clients in industries from life sciences, industrial and commercial to government, healthcare and education. The firm of 400+ people continues to grow via its reality capture, manufacturing, service and controls divisions.

- Vendor support was spotty at best. Instead of taking responsibility and helping UMC resolve issues, the software provider and the overlay provider pointed fingers at one another, says Frey. “We could never get the troubleshooting support we needed.”
- Marketing, sales and business development teams lacked a single, trusted source of data. That proved to be a constant obstacle to collaboration, efficiency and, ultimately, the fruitful business pursuits a firm relies on to grow and thrive.

It was time, Frey and the UMC executive team concluded, to find a CRM system designed specifically for construction firms, and one that would reinforce the firm’s culture of innovation and collaboration.

THE CRM SOLUTION FOR UMC

A thorough due diligence process led UMC to choose Unanet CRM by Cosential, a solution purpose-built for architecture, engineering and construction (AEC) firms, and one that is highly-rated by users across the AEC industry. “I was familiar with Unanet,” says Frey, “I’d seen it work really well for other companies in our business.”

In particular, Unanet CRM emerged as the best choice for UMC because:

- As a system purpose-built for construction firms, it’s well-suited to rapid implementations. Following the selection of Unanet CRM in late December 2020, it took a mere four months to get the system integrated and fully operational.
- It’s a fully integrated CRM, providing a single, stable environment and data resource for the entire enterprise and its multiple divisions, without cumbersome third-party overlays.
- It provides all the capabilities and visibility that marketing, sales and business development teams need to work efficiently, from contact management to proposal generation to pipeline visibility and beyond.
- It offers the strong reporting, forecasting and account planning tools and capabilities that UMC sought, as well as a products module that enables quoting for the firm’s reality-capture and manufactured products directly from the CRM.
- Wizard-style tools to streamline workflows and automate the flow of data across the firm.
- It’s dashboard-driven to cater to a visually-oriented business, enabling people throughout the firm to measure performance, identify trends and draw insight from key data in real time.



IMPACT

Almost from Day One following implementation in April 2021, Unanet CRM began proving its value across the firm, with benefits that go directly to the bottom and top lines of the business, among them:

- **Significant, immediate cost savings, including AT LEAST ONE FEWER FTE.** After No longer does the firm require a full-time employee to maintain its CRM system. Nor does it need to invest in a third-party overlay to make its CRM work.
- **Fast implementation — without cutting corners.** Shifting to a CRM solution purpose-built for construction firms spared the firm the time- and resource-intensive process of a lengthy, complicated implementation. Unanet CRM was **UP AND RUNNING IN FOUR MONTHS**. “We didn’t have to create a lot of things from scratch,” Frey says.
- **“Dramatic” improvement in user adoption.** Marketing, sales and business development teams all quickly engaged with Unanet CRM, along with people across the firm’s lines of business. The result: **“AT LEAST 3X BETTER USER ADOPTION** overall” with the new CRM system compared to the legacy system, according to Frey.
- **Improved communication, collaboration and inter-departmental support across the company,** the result of having **a single source of truth and greater visibility into data.** Marketing, sales and business development now have “a really solid single database” to ensure they’re always on the same page, sharing resources and working toward the same ends, Frey says. “They have more to talk about among themselves and with customers, and everyone has a clear idea of what’s happening with customers, with pursuits and with the pipeline.”

“Our marketing and business development teams are huge proponents of Unanet CRM, and all our lines of business have really come onboard with it, too. People are finding uses for CRM that they could never imagine before.”

— Bob Frey, UMC Director of Sales and Operations



- **Full, seamless and stable integration across product and project pricing, quoting, proposal-generation, prospect and client interactions has enabled the firm to capture important new internal efficiencies.** Frey estimates **THE UMC MARKETING TEAM WORKS 20 TO 30% MORE EFFICIENTLY** as a direct result of Unanet CRM's automated tools for proposal creation, résumé trafficking, etc., freeing them to focus on work that delivers higher value to the firm and its clients. People across the firm also waste significantly less time searching for data or insight. "There's no question about how and where to find something," says Frey. "The answer when someone asks is, 'It's within Unanet CRM. Let me show you where.'"
- **An expanded contact base from which to cultivate new business.** Frey estimates the firm has **GROWN ITS CONTACT BASE BY 30%** with Unanet CRM in less than a year.
- **ZERO REPORTING LAG TIME.** Instead of having to wait 24 hours for the old CRM to provide dashboard-based reporting, information flows to people in real time via Unanet CRM's dashboards.
- **Organization-wide alignment around standards, expectations and goals.** Having ready access to dashboards portraying key individual, line-of-business and firm-wide metrics has elevated collaboration and accountability within and across teams and the business, reinforcing UMC's innovation-focused culture.

"Every bit of information that people need to know about what's happening within the company is there, at their fingertips, in Unanet CRM."

— **Bob Frey, UMC Director of Sales and Operations**

KEYS TO SUCCESS

With close to a year's experience with a project-based, purpose-built CRM under his belt, Frey offers the following suggestions to guide AEC firms that may be considering a similar CRM upgrade:

1. Look for a CRM solution you can roll out and use enterprise-wide.

Don't settle for piecemeal products — a contact-management product here, an e-mail marketing product there — when an integrated end-to-end solution could well be your best, most cost-effective option. A patchwork approach could drag a firm right back to the inefficient, siloed and opaque world it sought to escape.

2. Seek a purpose-built solution. As UMC discovered, a CRM that's designed specifically for AEC firms should be simpler and faster to implement, and, because it maps directly to the processes and workflows unique to project-based construction businesses, more readily embraced by users.

3. Find a true CRM partner, not just a vendor. The best CRM outcomes are those in which the provider of the solution supports its clients with service that's as high-quality as the solution itself, that invites, listens to and acts upon customer feedback, that is attentive and

accountable rather than indifferent to customers, and that provides guidance to customers long after the initial sale and implementation — in short, all the things a generic, off-the-shelf CRM product and vendor typically aren't.

4. Prioritize tools that make it easy to measure, analyze and act in real time.

Having a single source of trusted data, along with powerful tools to analyze and provide newfound visibility into that data, helps to sync marketing, sales and business development — and the entire firm — to goals, strategies and values. "It helps people stay on track, so they know where they need to head for the whole company to be successful," Frey says.

5. Prioritize a solution that comes with robust, ready integrations.

Plug-ins and prebuilt integrations between Unanet CRM and other key software systems on which the firm relies are enabling UMC to build an entire integrated digital ecosystem.

To learn more about Unanet CRM and what a purpose-built solution can do for your architecture, engineering or construction firm, contact us at www.unanet.com.

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 decisionmaking, and nurture business growth.

