

To go or not to go: Allgeier, Martin and Associates uses Unanet to predict the winnability of business opportunities more accurately

Motivation to find a new CRM Solution

As a consulting firm specializing in electric power and civil engineering, Allgeier, Martin and Associates provides next-level service to its clients. It does this by prioritizing efficiency. To match this relentless pursuit of results for its clients, the firm needed to evolve its marketing approach.

Gabe Lett, Allgeier Martin's marketing specialist and marketing guru, recognized a need to modernize the firm's marketing strategy to reach the right clients. This required a robust customer relationship management (CRM) tool to access and organize data and create a historical record of business development.

Challenges

Allgeier Martin wanted to apply more efficiency to its marketing strategy to mirror the same focused level of efficiency it delivered to its clients. The firm had two primary issues to address in doing this:

- **No formal way to track or evaluate opportunities.** Before introducing Unanet's software solutions, Allgeier Martin did not have a systematic approach to track and evaluate potential business opportunities. This meant that valuable time and resources were spent pursuing leads that might not align with the firm's expertise or business goals.
- **Client data was scattered across different platforms.** With a lack of integrated systems in place, Allgeier Martin found it difficult to analyze client data effectively. They needed to make understanding client needs and preferences easier so they could deliver more personalized services and tailor their marketing efforts accordingly. To accomplish this, they needed a way to centralize their data.



Allgeier, Martin and Associates, Inc. contains electric power and civil engineering divisions, serving clients across the midwestern U.S. The firm offers in-house surveying, right-of-way, mapping, computer services and reprographics departments. Most projects are completed in-house to control costs and maximize efficiency.

The CRM Solution

Lett began researching different CRM systems. The firm needed its data organized and accessible, with clear, easy-to-access business development records. “We needed to understand where we were going, and why we were going there,” said Lett.

With this in mind, Allgeier Martin evaluated Unanet CRM as its top option, taking advantage of the following capabilities:

- **Implement a new system of opportunity tracking.** Allgeier Martin began by using Unanet as a tool to organize and track its opportunities and leads from conception to the issuance of RFQ/RFP and, ultimately, project award.
- **Store and manage opportunity data.** The platform kept a detailed record of significant client interactions. This allowed the firm to streamline processes, track opportunities effectively, and gain valuable insights into its potential clients.
- **Store and manage personnel data.** The platform also facilitated HR functions, lightening the administrative load of managing personnel information.

The Approach

Embracing change with open arms, Allgeier, Martin and Associates sought to revolutionize its operations, one step at a time. Here’s the process they followed for implementing Unanet CRM.

- **Select the right system for its industry.** The evaluation process was the first step, and Lett wanted Unanet because it was the right fit for the firm. Allgeier Martin chose Unanet because it is tailored to their industry, making it an ideal platform for the firm’s business needs.
- **Focus on ease-of-use.** With Unanet’s simple and intuitive interface, user adoption was not an issue. The platform’s user-friendly design made it easy for employees to learn and navigate the system, increasing their efficiency and productivity.
- **Collaborate with Unanet to learn the system.** Whenever the firm’s people had a question, Unanet was available to help guide them through it. “We had good responsiveness from a customer service standpoint,” said Lett. This responsiveness made it easier to navigate the platform, enabling seamless adoption.

With Unanet CRM in place after a carefully planned and well-executed implementation, Allgeier Martin found itself ready to reap the benefits of its partnership.



Unanet gave us a high level of predictability when evaluating opportunities. I was predicting potential winners 80% of the time and predicting our losers at 100%. This helped us get much more targeted in our pursuit efforts and has resulted in more quality wins and higher profits. If my ability to predict can drive those results, that gets the board's attention. They love tools that give us the ability to make more informed decisions, saving time and money by ensuring we pursue the right work."

Gabe Lett
Marketing Specialist
Allgeier Martin and Associates

The Impact

The firm had no shortage of ways in which it saw value from Unanet CRM once the implementation was complete, including:

- **Enhanced capability for predicting proposal outcomes.** By using Unanet's go/no-go form and scoring system, they achieved a high level of predictability in winning or losing proposals. Lett said he spent a year using the form to score every project opportunity and found himself able to predict winners correctly 80% of the time – and an ability to predict losers a staggering 100% of the time. "When I presented the numbers to our board, they were extremely happy with those results," said Lett.
- **A new method for staying up to date with high-priority opportunities.** They were able to set reminders to keep prospects at the top of mind.
- **Tracking the right data at the right time.** The functionality of the dashboard allowed them to easily identify, see, and track the data that mattered most to the firm.

Within a year of adopting Unanet, Allgeier Martin achieved an exceptional proposal win-loss prediction accuracy and pursuing client and projects with higher profitability. The firm could now make informed decisions about which clients and projects to pursue.

Partnering a proven record of delivering results to its clients combined with a laser-focused ability to predict the most profitable work to pursue has proven to be a winning combination for this successful firm.



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