

# Commodore Builders Transitions to Purpose-Built CRM Tailor-Made for the Construction Industry

## Motivation for Seeking a New CRM Solution

To identify a customer relationship management (CRM) solution configured for the firm's business development and marketing needs. Commodore Builders faced several challenges in managing their rapid growth and streamlining its CRM processes. It used Microsoft Dynamics for its CRM needs and found it to be inflexible, costly, and not purpose-built for the construction industry. Unanet CRM, a leader in CRM software, stepped in to provide a tailored solution designed specifically for architectural, engineering, and construction (AEC) firms.

## The Challenge

Microsoft Dynamics wasn't ideal for the firm's industry or business needs, leading to the following challenges:

- **Transitioning from cumbersome individual spreadsheets to an efficient CRM system.** Initially, Commodore relied on individual spreadsheets before trying Salesforce, then Microsoft Dynamics - neither met their needs.
- **Struggling with inadequate configuration and lackluster usability in Microsoft Dynamics.** Microsoft Dynamics took too long to configure or update. This lack of configuration flexibility often rendered these solutions unusable.
- **Spending excessive time and money on consultants to operate previous CRM solutions.** Commodore's Director of Internal Operations, Amanda Finnerty, often needed to bring in outside consultants to assist her in getting Microsoft Dynamics to work for them.



Commodore Builders is a veteran-owned construction firm with 250 employees and \$500 million in annual construction revenue. The firm primarily serves the state of Massachusetts with some supporting work in the surrounding New England region. It serves the corporate interior, life science, commercial institutional, and public markets, with additional support in the historic preservation space.

- **Backend changes obstructed access to their CRM data.** Microsoft often made backend changes that caused major disruptions to Commodore's systems and ability to access data. That led to even more time spent working with consultants and support trying to overcome these issues.
- **Managing growth necessitated a new CRM solution.** Acquisitions and a growing base of employees meant the organization needed to identify a better way to manage its customer relationships.
- **A complex interface that didn't allow users to quickly and easily on-board.** It was critical for Commodore to partner with a solution that users could learn fast with minimal internal assistance. "I didn't want to be the 'forever implementor' for the software," said Finnerty. "The team couldn't make a change in the old provider without me. With Unanet, we have guidelines. People know where to start. They can figure out most things on their own."

## The Solution: Unanet CRM

After evaluating another industry competitor, Commodore selected Unanet as the perfect CRM solution to support its business development and marketing efforts based on these qualifiers:

- **Comprehensive capabilities with streamlined configuration to fit their specific needs.** Commodore wanted a CRM purpose-built with the construction industry in mind. That meant having the ability to enable fast configurations, which Unanet could facilitate.
- **A feature-rich mobile app that enhances usability and convenience for Commodore Builders.** A big differentiator for Unanet was the accessibility of its mobile application. Commodore users loved having a tool they could pull up at a moment's notice to equip them with the right data to strengthen their customer connections. "Everything we could've thought about wanting out of a business development and marketing software, Unanet had – and then some," said Finnerty. The mobile app delivered a complete solution for Commodore's business development and marketing needs – helping its business development team function more effectively and giving its marketing team access to the data they need for faster proposal creation.
- **Access a full-featured mobile app that delivers crucial information to users on-the-go.** Commodore relied on Unanet to implement a failsafe method for accessing customer information at a moment's notice through the Unanet mobile app. "You don't have to worry about saving a contact to your phone," said Finnerty. "You can open up Unanet and make the connection from there. You have all the information you need, and it prompts you to add notes which you can then associate with an opportunity. It makes it easy for our teams."

- **Seamless integration with Sage.** Finnerty lauded Unanet's ability to integrate with Sage, Commodore's enterprise accounting tool.
- **Seamless integration with InDesign.** Finnerty also spoke highly about Unanet's ability to integrate with InDesign, the program its marketing team uses for submittals and proposals.
- **Easy-to-understand documentation that facilitated a smooth adoption process.** Unanet writes its guidance in plain language anyone can understand while communicating the concepts users need. "Unanet's documentation isn't tech-heavy jargon," said Finnerty. "You have to write support articles in a way that makes sense to people," said Finnerty. "And Unanet has done that very well." This cut down on the amount of time users spent resolving issues or learning the software.

## The Approach

Here's how Commodore made its transition as smooth as possible while optimizing adoption:

- **Increased adoption of the software throughout the organization, including executive leadership.** Leadership buy-in was essential, so Commodore ensured the C-Suite received a full demonstration of the solution's capabilities.
- **Improved security with role-based access controls and granular permissions.** As it was evaluating prospective CRMs, security was top of mind for Commodore. Unanet's ability to restrict permissions to the right people at the right time was critical. "It was important to ensure people weren't sharing or breaking any kind of data," said Finnerty.
- **Streamlined CRM processes in a way that contributed to revenue growth and enhanced productivity.** Finnerty found that Unanet's setup encouraged "forced best practices" on account of having all the information the firm wanted at its fingertips. "When I exported data out of our previous provider into Unanet, Unanet required specific fields the old tool hadn't," said Finnerty. "Unanet had all the information we needed, broken out in the way we needed it."



The mobile app is amazing – how robust it is. The ability to see and access every piece of information from your mobile app is pretty mind-blowing.

– Amanda Finnerty, Director of Internal Operations, Commodore Builders

## The Impact

Unanet CRM and its efficient solution satisfied all of Commodore Builders' requirements and has aided in the company's overall growth and employee satisfaction. By addressing the challenges the firm faced with Microsoft Dynamics, Unanet CRM has paved the way for Commodore Builders to focus on their core business and continue delivering exceptional construction services in the AEC space.

Commodore saw near-immediate results by switching to Unanet CRM, including:

- **Significant time and cost savings due to eliminating expensive consultant fees.** Gone were the days of wrangling incompatible software. "With our old software, if there was a dramatic change on the backend, it would take hours with a paid consultant to figure it out," said Finnerty. "I had multiple meetings with them, paying them a significant hourly rate, plus my time. It was quite expensive and I cringed every time someone asked me to configure anything. Someone asked me to make a change in Unanet the other day and I did it in two minutes."
- **Empowered users who can now configure and access real-time information without relying on consultants.** Finnerty found the time it took to configure Unanet was drastically shorter than the time it took to configure Commodore's previous solution. "To do what would be a minor change in Unanet - like adding a field - would take 20 minutes in our old provider; it would take three with Unanet," said Finnerty. "In some cases, making an update or change could take hours."
- **Positive user experience leading to organization-wide adoption of the CRM solution.** After performing a demo for leadership, Finnerty found that executives immediately began using Unanet. "We showed our executive team two things: Unanet's Outlook integration and Mobile app," said Finnerty. This caught their attention right from the start. "They were pulling it up and working with the platform IN the meeting. We've showed them every other CRM and it took them much longer to get involved with it."
- **Valuable insights and information made accessible through the mobile app, facilitating faster decision-making.** Unanet's mobile app delivered all the information users could want or need directly to their phones. Finnerty said the app led Commodore users to question, "Why in the world would you ever access this information from a spreadsheet when you can do it from your app?"



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– Amanda Finnerty, Director of Internal Operations, Commodore Builders

# Meet Unanet CRM by Cosential

Unanet CRM enables Architectural, Engineering, and Construction (AEC) firms to increase revenue while decreasing the cost of winning new business, with Growth and Relationship Management software and services that bring order, control, speed, and efficiency to business development and marketing processes. As the leader in Growth and Relationship Management software for the AEC industry for over 20 years, we have helped more than 1,000+ AEC firms increase annual revenue and improve productivity in key business development processes by up to 50%.

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