Unanet
CRM by Cosential

Billion-Dollar Construction Firm Adopts Unanet CRM to Handle Thousands of Proposals A Year

Motivation for Seeking a New CRM Solution

One of the nation's most distinguished commercial construction companies, Swinerton has experienced remarkable success for over a century. As the firm continued to grow, however, it became increasingly apparent that an integrated solution to more effectively manage its business relationships was needed.

The firm's existing technology stack consisted of two disparate legacy software platforms: Salesforce for relationship management and CMiC for opportunity management. Swinerton wanted to upgrade this inefficient setup into a single solution that would centralize insights, intelligence, and assets across all functions and locations.

The Challenge

- **Cost efficiency.** The firm was allocating significant funding towards retrofitting Salesforce to construction workflows and processes, but even with customized upgrades, the CRM fell short of meeting the user requirements unique to the industry.

- **User adoption.** The Salesforce build-out lagged behind Swinerton's rapid growth, and the relationship data in Salesforce was siloed from the opportunity data in CMiC. Tracking conversions became a challenge, and users were unable to see whether the CRM even contributed to the success and, if so, how. This perceived lack of value, combined with an inefficient build, led to a sharp decline in adoption.

- **Data cleanliness and centralization.** Low engagement and lack of integration led to fragmented and inaccurate customer relationship data. Contact, pursuit, and project data were incomplete and scattered across various sources, resulting in information gaps, process inefficiencies, and poor insight into project opportunity and successes.

- **Pipeline management.** Without accurate data to leverage, Swinerton was unable to produce meaningful industry-specific metrics or key performance indicators (KPIs). Critical information, including pipeline status, key client and consultant experience, and sales and revenue projections proved difficult to collect, let alone analyze.

- **Forecasting and reporting.** Correlating and reporting on KPIs like opportunity type, conversion rate, and cycle length, proved impossible. Without these insights, Swinerton faced hurdles in allocating resources, prioritizing opportunities, and maximizing profitability. Instead of being driven by data, forecasting, portfolio optimization, and decision-making, they were based on subjective factors like gut instinct and individual experience.

SWINERTON

Founded in 1888, Swinerton is an award-winning commercial construction firm encompassing over 4,300 employees across 20 offices from coast to coast. In 2022, Swinerton ranked 21 on Engineering News-Record's prestigious Top 400 Contractors list. Many of their projects are featured on the National Register of Historic Places and other architectural preservation lists.

The CRM Solution

After a long search for a solution tailored to the needs of a mature construction business, Swinerton chose Unanet CRM by Cosential for several reasons:

- **Purpose-built for AEC.** Since Unanet CRM is developed specifically for AEC businesses, Swinerton can rely on the intellectual capital already embedded into the solution, eliminating the need for extensive software research and development.

- **Transparency from end to end.** Unanet CRM unifies, streamlines, and provides transparency around Swinerton's business development and marketing processes from lead identification through project closeout—all in a single comprehensive platform.

- **On-the-go access to an integrated solution.** With a robust mobile app, advanced Outlook integration and the ability to interface with a host of other industry-standard tools, users can access all the key data they need whenever they need it and wherever they're working.

- **Best-in-class relationship management.** Unanet CRM empowers Swinerton to more easily grow its contact base, gain deeper insights into its key relationships and understand how those relationships connect to the pipeline and projects.

- **Easy proposal generation.** With a centralized repository of the key project data needed for proposals, Swinerton can allocate more time towards strategy rather than chasing down information. And with built-in proposal automation, the firm can effortlessly create, manage, and track the thousands of proposals it develops each year.

The Approach

Swinerton and Unanet collaborated to develop a customized process that would seamlessly implement Unanet CRM across the firm.

- **Gain buy-in over time.** The implementation team opted for a phased buy-in process to foster sustainable adoption. The engagement campaign initially focused on the CRM's utility as a proposal-generation solution to address the most immediate pain points. With initial buy-in secured, the following phase of education focused on the future possibilities unlocked by the tool's more sophisticated pipeline management and analysis capabilities.

- **Fit platform to process.** To ensure high levels of adoption, the team worked to embed Unanet CRM into existing workflows. Instead of asking users to interrupt their processes and jump applications, the solution was designed to engage users in the environments they were already working.

- **Create a comprehensive, integrated solution.** A centralized CRM solution to track historical trends, deliver data-driven insights, and manage the firm's pipeline accelerated business development endeavors. Integration with other platforms eliminated duplicative tasks. Centralization made cross-functional collaboration more efficient.

- **Iterate for continued improvement.** To ensure ongoing engagement, users were consistently encouraged to provide feedback on pain points and challenges. In response to the user experience data being collected, protocols and functionalities were further developed within the CRM to automate time-wasting tasks, enhance usability, and eliminate procedural ambiguity.

- **Customize analytics and reporting.** Multiple dashboards and reports were established to maximize the value of Unanet CRM as a company-wide solution. Comprehensive reports provided granular detail to analysts and controllers. Visual dashboards provided executives and leaders with all the key information required to make strategic decisions in a glance.

The Impact

- **Improved strategic decision-making.** Thanks to the elevated level of visibility across the company and into the pipeline, and the centralization of such key information, executives and leaders are more confident and comfortable making strategic decisions.

- **A 70% increase in user adoption and collaboration.** With a powerful solution designed for the AEC industry and that could align to the needs of the firm, user adoption skyrocketed. Collaboration is now more seamless and information about common clients more easily shared across regions and offices.

- **Centralized knowledge and insights.** Data and insights can be readily sourced from across the organization and users have a central repository for up-to-date, trustworthy information on contacts, leads, opportunities, pursuits, proposals, project data, and other related documentation.

- **Reduced administrative overhead.** Integration has unlocked automation and eliminated redundant, time-consuming, and error-prone manual data entry. With a fully integrated system and a reliable single source of truth, they've been able to automate processes and integrate with other systems. Processes that once relied on duplicate entry and side spreadsheets are now fully streamlined.

- **More accurate forecasting and planning.** Advanced revenue-projection capabilities have made forecasting more transparent, accurate, and stable. With data on past performance across all geographies, firm leaders have empirical evidence on profitability and market trends to drive decision-making in both the short and long term.

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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