

# Better data, better win rate: How Clayco leveraged its data into winning better projects using Unanet

## Motivation to Find a Solution

Five years ago, in the competitive realm of design, engineering, and construction services, Clayco stood at a crossroads. The obstacle? Ensuring the reliability of project data and streamlining their proposal processes to keep pace with their staggering growth. Clayco recognized the necessity for an innovative solution that could allow them to use and manage their data analytically to pursue and win the right projects.

The integration of Unanet CRM was the firm's forward-thinking, strategic move that not only tackled these obstacles head-on, but also set a new benchmark for operational efficiency.

## Challenges

Clayco faced some difficult but common business challenges before making the move to Unanet. Some of the firm's specific roadblocks included:

- **Incomplete project data.** Maintaining the integrity of project data was difficult due to information being scattered across various files and server folders. "Clayco's rapid growth meant that the outdated practices that worked for our small, localized team—keeping data in siloed locations—were not up to par as our team's responsibilities increased," explained Emily Tribbia, Director of Pursuits. "We needed a solution that quickly accommodated our fast growth in market share."
- **A cumbersome process to update resumes for proposals.** Updating team resumes for proposals was a time-consuming and inefficient process, relying heavily on individual outreach and manual data input while Clayco was hiring at a record pace.
- **Sluggish access to project and personnel data.** Retrieving project and personnel data for leadership inquiries was a slow, inefficient process, delaying important decision-making on key pursuits.

The firm needed an efficient solution to simplify their data systems.

## CLAYCO

Clayco, based in the United States, employs more than 3,500 people, and generated \$5.8B in revenue for 2023. With ten offices nationwide, this privately-owned company specializes in development, architecture, engineering, construction management, and more, serving a wide range of clients with diverse project needs.

## The Solution

Using Unanet's industry-specific solution, Clayco gained a deeper understanding of how to utilize its data effectively to drive results.

- **Centralized project and personnel data.** Unanet CRM was implemented to serve as a single source of truth for project and personnel data, facilitating real-time updates and reliable data access. Clayco's pursuit team used Unanet to capture and track all project and personnel information, resulting in a drastic increase in productivity. Because of the integrated nature of Unanet, their teams trust the data as their single source of truth.
- **Becoming leadership's go-to source for project data.** Clayco utilized Unanet's configurable reporting and retrieval tools to improve timeliness and efficiency in leadership inquiries. It also empowered their pursuit team to be confident in delivering project information integral to their continued economic growth. "Previously, there was no system for our pursuit team to run reports on historical project data," said Megan Litton, Director of Pursuits. "Now, adding that capability positions our pursuit team as the source of knowledge for helping leadership make decisions. This has been integral to our success in pursuing new work."
- **Integrated self-serving Employee Portal.** An Employee Portal was developed by Clayco in-house and integrated with Unanet CRM. This modernized how employee data was collected and managed. "Having a single, self-service location for employees and marketing teams to access this data increased our productivity for proposals tenfold," Kelly Brown, Marketing Data and Process Manager, noted. "It also encourages employees to track their professional growth, which benefits our marketing teams significantly."



**Unanet allows us to feel more confident in the data we are providing as our business continues to grow and expand into new advanced markets.**

— Megan Litton, Director of Pursuits, Clayco

## The Approach

The adoption of Unanet CRM involved weaving it into the fabric of Clayco's daily operations. From proactive data collection to integrating Unanet CRM with OpenAsset for a holistic data management solution, the focus was on enhancing accessibility, accuracy, and efficiency.

- **Blend Unanet CRM into the team's workflow.** Unanet CRM was integrated into pursuit management processes for the team. solution for cloud-based proposal data and images for ease of access by the pursuit team anytime, anywhere.
- **Improve data quality.** Proactive data collection measures were implemented to maintain accurate, up-to-date proposal and staffing information.
- **Integrate tech stack.** Unanet CRM was integrated with OpenAsset to provide a comprehensive
- **Collaborate with Unanet to achieve the desired outcomes.** The team worked closely with Unanet to improve their internal processes and strive toward proposal automation.



Before, we had a lot of dependencies on manual entry, leaving us vulnerable to human error. We also had no way to run reports. But now, with Unanet, we're able to tell business unit leaders who has experience in each of our market sectors. It helps make our proposal process move much more efficiently, allowing us more time to focus on our win strategy."

– Emily Tribbia, Director of Pursuits, Clayco

## The Impact

The results spoke volumes. Clayco saw a surge in output of RFP's. Unanet's centralized solution helped Clayco increase both productivity and employee satisfaction. As the firm pursued new advanced markets, the capabilities provided by Unanet enabled more tailored and calculated responses, capitalizing on Clayco's data to propel business growth.

4%

win rate  
increase

3x

more  
pursuits

Increased  
Proposal Quality

- **The win rate improved by four percent.** Clayco saw an increase of over four percent in their win rate on pursuits.
- **The number of pursuits tripled.** The volume of pursuits grew from around 50 in 2020 to over 150 by the end of 2023 while maintaining a lean team of pursuit managers.
- **The quality data improved proposal quality.** From the beginning through final delivery, the proposal process was enhanced with quick and easy access to project and personnel data through Unanet CRM.
- **Automation of capturing personnel experience.** "Clayco is widely recognized as an industry-leader in many aspects. The integration of Unanet now provides us with a proactive solution for capturing and sharing employee data, showcasing the exceptional quality of our staff. Our depth of talent is unmatched and Unanet helps us leverage that data instantly giving us a competitive edge," said Brown.

As Clayco strives for another record-breaking year, the pursuit team's use of Unanet CRM continues to advance the quantity and quality of RFP responses, increase internal best practices, and produce higher win rates.



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