

A.P. Construction invests in digital transformation for strategic project pursuit

Challenge: Future-Proofing Long-Term Relationships

When Director of Business Development, Jim Cecil, joined the ranks of leadership at A.P. Construction, their high standard for success was evident: Jim had walked into a firm that among other accomplishments had completed well over \$500 million in education construction projects and has thrived for over 20 years in the healthcare market.

It was clear A.P. Construction had long standing relationships in well-developed market sectors; with over 70% of projects coming from repeat clients. APC needed to ensure their institutional knowledge, cultivated for decades, remained accessible to future generations of the firm. Winning over 80 projects per year also means “every year that goes on, APC has a mounting database, this database is a collection of spreadsheets living in various folders in a huge complicated web on the network with the concept of a CRM relatively unknown,” shares Jim.

He wasn't alone in recognizing the importance of not only understanding the well cultivated business relationships APC has, but in forming a shared nomenclature around sales and business development activities to gain transparency and insights for future growth.

In order to evolve its business development strategy further, APC is working to develop a deeper shared understanding of existing business relationships and automation of manual processes to ultimately create efficiencies around winning work. “In the past, these were calculations that were done intuitively, which meant our process was missing the ability to leverage the width of our relationships.”

About A.P. Construction

Since its inception in 1981, A.P. Construction Company, a construction management and general contracting firm headquartered in Stamford, CT, has proven experience spanning construction for commercial buildings, educational facilities, healthcare and municipal facilities, private clubs, and multifamily and senior living properties.

Their approach and attention to detail, while meeting the needs of owners, tenants and architects, has established its reputation for integrity, quality, efficiency and savings for its clients over the past four decades.

“ One challenge was to have our institutional knowledge accessible to future generations. A lot of our history, project specifics, and data lived in the minds of multiple individuals. However, as we grow and move to new generations to carry the torch in the future - we don’t want to lose that institutional knowledge. ”

JIM CECIL
DIRECTOR OF BUSINESS DEVELOPMENT,
A.P. CONSTRUCTION

Solution: Strategic Investments Towards Digital Transformation

APC needed a platform robust enough to capture all of the pre-existing tribal knowledge, while continuing to collect, organize, and store these insights in such a way that could be easily accessed and quickly searched. For Jim, the critical requirement to corral large quantities of tribal knowledge was juxtaposed with the realistic need of a software solution simple enough to be phased in slowly. This is largely to ensure firm-wide user adoption while simultaneously enhancing the nuances of construction-based Business Development and Marketing activities.

Sought-after change can feel daunting when it’s happening firm-wide, and considering the successful legacy of A.P. Construction, tackling this without a partner you can trust could be a recipe for failure. Jim knew that in order to drive forward he needed to go beyond a niche CRM point solution, and ultimately invest in something scalable.

According to Jim, this is where Unanet CRM “became a no-brainer”. “I got to experience the customer service, which in my mind has been outstanding, and that made a huge difference. Other companies can talk about their customer service whereas, at least with Unanet CRM, I had past experience as a customer. Unanet CRM’s customer experience is above and beyond expectation,” shares Jim.

Adopting Unanet CRM’s New Business Development Experience is leading the shift from handwritten notes to a dynamic system of record for housing every inch of A.P. Construction’s pre-sales process to continue driving the firm forward.

Unanet CRM by Cosential for Mobile: Taking Technology To-Go

Regardless of location, by leveraging Unanet CRM for Mobile, APC’s strong commitment to enduring business relationships remains constantly in-play. Conversations with architecture firms and prospects stem from first-hand knowledge about projects rather than recycled meeting stats. “I’m constantly driving to actually walk the jobsites,” drawing business development activities away from desktops necessitates carrying a piece of all the right information while on-the-go.

“I literally use Unanet CRM for Mobile every day.” From the practical aspects of strategizing check-ins based on location, “the map helps me get from one site to another because we’re now tracking jobs as we’re winning them, and dropping key details into Unanet CRM” to gaining quick access to business contacts and personnel while on-site.“

I can also just go to the Personnel tab to find their phone numbers, or if I need to call someone at a certain architectural firm I can look up that firm and make the call.” Having technology work where daily habits already thrive has become a key element for how Jim has made small shifts make a big difference.



Unanet CRM by Cosential for Outlook: Dripping Insights From Email

Only the wise business developers know the significant time investment to really nurture relationships. Adding to that is the need to identify the best relationships to develop and the frequency of interaction. Factoring in the right layer of technology should feel like it's assisting the pre-sales process, which is exactly the approach Jim takes with Unanet CRM for Outlook.

Unanet CRM makes it seamless to capture and link vital communication, like new contacts and activities with smart auto-associations straight from email. Pairing Outlook and Unanet CRM together to manage leads and opportunities is frictionless "The beauty of it is that I don't even feel like I'm updating data," making it easy to infuse into Jim's inbox where many e-introductions, meetings, and pursuit details are already being exchanged.

Directing contact and connection details into a single source of truth throughout a project pursuit enables APC to convert their insights into actions on the spot. "I also log activity to review with other leaders in APC, many of which have longstanding, successful careers in the market and a robust network, which is exactly what we're all trying to build." With industry relationships being so important in the construction business,

dropping connection insights from email creates visibility for leadership, who then "can share some of their institutional knowledge, and help a pursuit. From there, I can take that information and redirect my activities or make notes into personnel or contact records."

Unanet CRM by Cosential for Web: Bringing The Big Picture Into Focus

Weekly pipeline conversations have been an ongoing best practice at A.P. Construction in order to debrief executives, dive into projects, and provide an opportunity to discuss active pursuits. Those discussions are moving from static documents to a dynamic Unanet CRM report that illustrates opportunities in real time as they fit into their sales process, complete with streamlined views of goals and progress. "I could do that in seconds now. Unanet CRM has the ability to gather every bit of information that's in there and generate on command," says Jim.

Conversations can quickly evolve from simple status updates and narrow in on strategy, "now I'm looking to see 'have we done work with them before, if so, how did that go, who do we know at this firm, and who on our team has that relationship?'"

Jim goes on to share that these changes are deceptively simple yet highly effective, "all of this collectively enriches my activity to be more pointed while simultaneously reducing

the time it takes to research somebody and find their contacts.” Centralized reporting also serves up personalized dashboards to display only the needed data with a nearly endless supply of widgets for tracking and visual analysis for a quick pulse on the state of the business. Unanet CRM handles heavy data sets for APC where “there’s more functionality for more detailed work,” such as bridging the gap from the now constant drip of new insights from mobile and email to “trying to load bulk information in locally” from years past.

Adding tags to account for project types, categories, or sectors has also yielded unanticipated results by automating another formerly manual process. This has allowed APC to accelerate their delivery of targeted and accurate portions of their proposals through Unanet CRM.

“There’s a whole benefit here, as something goes into the top of the funnel and then, hopefully, comes out as a “won” project it eventually loops back around to help win future projects. It’s cyclical: our wins become our collateral that we use to develop more wins.”

Conclusion: Trailblazing Leadership In Business Development

A business developer is responsible for many of the key insights that really impact a firm’s

overall growth. “There are a lot of dynamics that, I think, if we don’t gather here they just get lost – or – again, they remain in somebody’s head, but not necessarily shared collectively.”

By stepping foot into Unanet CRM’s New Business Development Experience, Jim Cecil has forged a path with a crystal-clear vision: “five years from now I’ll have the ability to look at a potential project and then know instantly what our win probability is, as well as have the ability to perform an informed Go/No-Go decision through Unanet CRM - linking all data points together.”

Considering the timespan of a pursuit before any large project reaches ground-break assures the future is already underway for A.P. Construction’s marathon, “we’re past the walking stage – we’re jogging.”

“The more we drip information into Unanet CRM the better we’re able to leverage our data to make smarter decisions about things that we’re going after, identify which buckets are too light or too heavy, or even address which competitors we’re up against.”

Any digital transformation requires a partnership between trailblazing leadership and a trusted platform to firms, such as A.P. Construction, who are strategically securing their market leadership for today—and tomorrow.



Where Information Means Insight

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