

# Bringing it all Together: How Fishbeck Unified 11 Offices

**With 11 offices spread across the country functioning as individual silos, Fishbeck, Thompson, Carr & Huber (FTCH) lacked universal data to operate as a unified company – until it found a way to bring it all together.**

But those 11 regional offices created a certain dilemma for Fishbeck. They operated almost independently, and information wasn't easily shared among them. "With projects and clients spread across state and city lines and all of that, we needed to share information and work together in order to have the best of the projects that could come in," declared Fishbeck Director of Marketing Jennifer Waugh.

## **Silos all around**

Instead, the offices were actually stepping over one another at times. "Some of our clients – especially maybe state or federal clients – might be across the state or across the Midwest, and we have to call upon them," Waugh detailed. "We would have instances where we would have a salesperson walk into a client or a potential client and talk to them about, 'Alright, we are Fishbeck, let's talk about what we provide,' and that client would say, 'Oh I know, I have a proposal on my desk here from your civil engineering department or your structural department.' So, we had these little stumbles that made us look bad to the client."

Moreover, each office was operating across multiple software applications that were built in-house. Not only was each location a silo of its own, but silos were ever-present within each office. "We had proposal automation software that we had built. We had accounting software that we had built. We had a separate system for resume creation that was separate from the proposal operation," Waugh explained. "And then we had another one that human resources and another team were using for member certifications and licensure. It was all separate, which it shouldn't be."

## **ABOUT FISHBECK**

*Fishbeck, established in 1958 and headquartered in Michigan, today is stronger than ever. A leading professional consulting firm, which offers engineering, environmental sciences, architecture and construction management services, Fishbeck grew fast in the past three years. Today, they span across 11 regional offices, anticipating to add more in the near future.*



## Different systems, different processes

Complicating matters, individual employees were using the systems differently. “It was different people handling each one, so one piece of data was entered four different ways,” Waugh said.

“The information that we had, even our contact manager system, was a mess, to put it mildly. So, we had departments that wanted to make their own contact system that was separate from other departments; they weren’t sharing information. We had pieces of mail going to people that were deceased or no longer with the company because the data wasn’t clean.” The need for something to link all the data – and all the offices – was apparent.

## Looking and Landing on a Purpose Built Perfect Solution

One of the reasons Waugh was hired at Fishbeck was to help address the disconnect between data within and between the home and regional offices. She knew a Customer Relationship Management (CRM) platform would be vital to allow the company to function as the singular unit it needed to be. But choosing the right tech stack was key.

“I looked at 55 different pieces of software,” Waugh confessed. “I had a spreadsheet; I did all of the research. We were looking at proposal automation software, a straight CRM, and then any options that would be a combination of both.”

## One platform to rule them all

Ultimately, one platform stood above the rest, thanks to its focus on the Architecture, Engineering and Construction industry. “Unanet CRM was very attractive to me, because it was both,” Waugh said. “We could do proposal automation and have the opportunity tracking that we needed...We didn’t have to spend time changing workflows. Unanet CRM already knew how we did business, and that cut out a lot of implementation time for us.”

With a solution tailored to its industry, Fishbeck set out to bridge the disconnect in its data and offices. “I’m in marketing so I love data, and before implementation, we weren’t able to track any sort of real numbers,”

Waugh said. “First of all, reports and sales, wins and losses, and that sort of information, but [also] the project information. We could never dig that out of the old accounting system that we had.”

## Tying it all together

Information previously disparate, if even logged, was now visible to all. “Now, for a proposal, I can tell you exactly how many higher ed projects I did in the last five years thanks to Unanet CRM. I can tell someone exactly how many projects we’ve done with a particular client thanks to Unanet CRM. We’ve been able to provide better data and real metrics in our proposals – and increase sales efforts in that way by using the data that we can pull out of Unanet CRM.”

Before implementation, data was often in the mind of the beholder. “From memory, we would try to remember which proposal we worked on, who was on it, where somebody might have kept it,” Waugh described. “We use the knowledge base [in Unanet CRM] extensively...We’ve been able to avoid the, ‘Do you remember that one proposal four years ago? Can we dig that up somewhere? Does somebody have it somewhere?’ because now it’s all saved in the same spot.”

## **A unifying transparency**

Not only is the data improved, but so are the workflows and communication based on that data. “The workflows are probably one of my personal favorite parts of Unanet CRM,” Waugh said. “It has really eliminated the emails, phone calls and the back-and-forth between our staff.

With Unanet CRM doing it for us, we don’t have to remember to notify a client manager or an account manager of an opportunity or a phone call. We can just click a little box, and Unanet CRM will do it for you. That’s been a great time saver for our staff, and has eliminated the pitfalls and the holes that we found in the sales process.”

That also means a unifying transparency across the entire firm. “I think the biggest benefit of Unanet CRM for us is transparency,” Waugh said. “We make sure that all of the information is in there and that it’s accessible to everybody in the company, regardless of their position.

Everything is an open book for the entire company. It’s the transparency of being able to see what everyone else is working on, where we are in proposals, and where the stages are for a particular pursuit. And for us, and for me especially, that’s something that I value.”

## **One Good Thing Leads to Another**

With improved data access, communications and workflows, Fishbeck doesn’t just operate more efficiently, but can attack business with a

growth mindset. The firm is eyeing several more remote offices in the coming year, which means more employees as well as more projects. “The efficiencies that are gained have enabled us to handle such tremendous growth,” Waugh added. “It is one of those hidden benefits that you might not have thought of when you needed a CRM, right? I’m trying to check some boxes, but I didn’t extrapolate far enough to think we would be able to grow faster if we’re more efficient in our sales cycle. So, it’s just one of those hidden benefits that we weren’t expecting.”

Another added benefit to the Unanet CRM implementation has been the integration of accounting data. Fishbeck opted to work with BST in part because it knew the software would be compatible with Unanet CRM. “Being able to implement them at the same time, we’ve built some efficiency in there, too,” Waugh said. “Accounting has to get the information from us in Unanet CRM when they create projects and clients, so we have the same back end data. The same numbers are used.

## **A Happy Marketing Team, a Happy Company**

With 15 marketing professionals, including seven who focus full-time on proposal writing, Unanet CRM has certainly made life easier at Fishbeck. But it’s not just the marketing team using the system. About 175 employees take advantage of its efficiencies and information, with many utilizing it on a weekly basis, if not daily. Waugh said the company had a 70% adoption rate within 30 days.

“I usually tell people that Unanet CRM is the perfect blend of capturing the data that you need and turning it into something that’s useful, but still being intuitive enough for a high user adoption,” Waugh said. “There’s no point in bringing a software on board, or any system or any process, if your users aren’t going to adopt it. And I think that’s what I love about Unanet CRM, is that they will adopt it. It’s intuitive, it’s easy for people to grasp, and that once they start using it, they love it.”



## Meet Unanet CRM by Cosential

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