

Unanet CRM by Cosential: Systematically Moving VLK Architects to the Next Level

In a world where one can learn and do anything online, information no longer serves as a bargaining chip when it comes to acquiring new business. A customer can obtain most of the background just by heading to the webpage. Now, companies must rely on the art of relationship building in order to attract and retain new and existing customers.

Those in the AEC industry actually depend on this particular approach the most, with the continual challenge of bidding for new business against other interested parties. In order to stand out from the competition, AEC businesses need a customer relationship management (CRM) software system that can tell the entire client story and grant them a leg up on the competition.

Growing Pains Alleviated by Unanet CRM by Cosential

For three decades VLK Architects has not only brought exceptional service, but the clients are also confident they will receive proper architectural solutions. These solutions are only made possible through the ability to build and track essential business relationships.

As VLK Architects continued to grow, its need for a more organized approach to these relationships became even more pressing. Prior to utilizing a CRM, VLK relied on standard in-house database software for storing client data. However, the firm knew if they wanted to continue their portfolio expansion, they needed a more modern method of storing and measuring their most vital information regarding clients, sales, and relationships.

Along came Unanet CRM.

VLK Architects: Over 30 Years of Dedicated Service and Growing

VLK Architects is a Texas-based architectural firm comprised of five offices and 140 employees. They have a long history of providing outstanding service to their clients, spanning everything from educational projects to commercial buildings and even interior design services.

According to James Sharp, Strategy Director for VLK Architects, a large portion of their business lies within the educational space. Their clients include school districts and campuses ranging in size from smaller districts like Clifton ISD, in Central Texas, to the largest ones in the state, such as Houston ISD.

From small towns seeking a new high school campus to urban districts who have experienced exponential growth, VLK Architects always seeks to provide the best service possible. Service has been the core tenet of the firm since it acquired its first client 34 years ago. With the unique approach they take to each and every client, VLK strives to bring each vision to life.



“To move up to that next level of growth for architecture firms you really have to be more systematic when it comes to business development and tracking those relationships... and I think that is where Unanet CRM came into play,” said Sharp.

VLK Architects wanted to be able to approach every prospective and current client with the most up-to-date information and eliminate redundancies and unnecessary meetings. With Unanet CRM, they were able to track all their client details starting with the first handshake all the way down to winning the work.

“There was a recognition that this firm was going to grow, and in order for it to grow, where service wasn’t sacrificed, this [Unanet CRM] was meant to be the mechanism to assist in the development of our client relationship strategies,” continued Sharp.

Unanet CRM by Cosential Tells the Whole VLK Client Story

Sharp says Unanet CRM is their central repository for storing all things client. He says this CRM allows everyone involved on each project to see the whole story – what has been done in the past or even what little has been done in the past, maintaining the natural progression of building the business relationship.

“Unanet CRM was that mechanism that created the structure for purposeful business development... the record for how we interact,” he said.

Unanet CRM is used primarily by both its business development and marketing departments, and has become a vital tool for preparing Statements of Qualification when competing for new work. Sharp says it not only tracks and maintains client data, but also serves as the central intelligence hub for VLK Architects’ business relationship mapping. They know with Unanet CRM, they come to the table with all the information necessary to compete.

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The Marriage of VLK Client Data and Financials– Ajera Integration

One specifically distinctive benefit VLK Architects found when using Unanet CRM was its ability to create a connection between their project management and their client information with Ajera. This allowed VLK to merge all client-related financial interactions with all of their additional client information stored in Unanet CRM.

VLK found Unanet CRM's integration with Ajera gave them the ability to easily send Ajera Project details into their current Unanet CRM setup. This data connector provided quick and seamless access to the newly created Ajera Projects populated from both new and existing data.

"This has really helped us create a whole picture of the work that we do," Sharp said.

Beginning with the first introductory meeting with a prospective client and ending with closing out the financials of a completed project, VLK Architects has found the marriage of the two to be quite the honeymoon. They have discovered that the ability to have this kind of data readily available is particularly effective in responding to questions about our project experience.

Sharp continued, "The Ajera FDC effectively turbocharged Unanet CRM's ability to unite all aspects of our operations as a repository of client and prospective client data, relationship support activities and project information. It immediately improved efficiencies in developing statements of qualifications.

Before, the marketing staff had to go to the project directors for data and then maintain that information in a silo. Now Unanet CRM provides secure, accessible and accurate project data directly to our marketing team."

In short, VLK Architects found the investment well worth it.

Unanet CRM by Cosential and VLK Architects: A Relationship Built to Last

Unanet CRM has allowed VLK Architects to manage relationships with their partners, streamline their workflow, follow up on prospective clients, and prepare consistent, accurate qualifications statements in a timely manner. Sharp believes that while the system requires an initial investment of time, it is essential if you are seeking to grow and move your business forward.

"Once you are able to tailor the system to suit your business needs, it really does become a very valuable repository of information," he said.

Their belief is that any time they bring on a new client, the intent is to continue to work with that client for years. Sharp summed it up simply, "it is not about that one building - it is about building a partnership."

Unanet CRM provides the platform in which Sharp describes as the circularity of client information – they are able to view the entire client history beginning with the initial approach through the project's completion, each and every time they do business. VLK Architects uses the Unanet CRM to work smarter, not harder.

Where Information Means Insight

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