

Unanet CRM by Cosential and Wieland Construction Case Study: Enhancing Accountability Through CRM Sophistication

In nearly every industry, client acquisition is what drives revenue and growth. The same can be said for those in the AEC industry, but the process is different. Instead of offering a product or repeatable service, the AEC industry bids to complete future projects. While the personal relationships may be similar to traditional sales, management of the process can be quite different. Because of this, members of the AEC industry function best when their customer relationship management (CRM) software is designed specifically for the unique needs of businesses in this sector.

Wieland and Unanet CRM by Cosential: Making the Switch

Wieland primarily performs private negotiated work and typically avoids hard bids. As a result, the firm requires an incredibly robust and centrally-located marketing effort. A specially-tailored CRM is crucial to this effort because as a construction firm, Wieland focuses on bid proposals, not products.

Prior to working with Unanet CRM, Wieland relied on another, more generic CRM, which lacked the intentionality and sophistication the company required. Despite this, Wieland continued to work with this CRM for some time. The need for a more robust CRM became most evident as Wieland expanded its operations beyond Michigan into other regions and as they sought an approach involving a cloud-based system.

Prior to switching to Unanet CRM, Wieland lacked satisfactory customer support. Shaw explains that, as a third party provider, his previous CRM was not invested in Wieland's experience and success. Although he doesn't regard "unresponsive" as an apt description, he does feel that the previous platform failed to

Wieland Construction's Background: Six Decades of Exceptional Customer Service

Headquartered in Lansing, Michigan, Wieland Construction has a long history of success within the construction industry. Chief areas of focus include construction management, general contracting and design/build projects. The firm has worked with several major clients, including General Mills, Bombardier and Bridgestone, among others.

Formulated in 2012, Wieland's mission statement includes a desire to "develop loyal customers through relentless customer service and empower our employees to transform our clients into our champions."

Vice President of Marketing Kevin Shaw refers to Wieland as a "company of some consequence." Over the past two decades, the firm's sales have skyrocketed from \$30 million to \$300 million. This impressive growth has been driven, in part, by the company's steadfast focus on customer satisfaction.

Although it began as a regional company, Wieland has branched out in recent years. In addition to its Lansing location, Wieland operates offices in dynamic regions such as Orlando, Raleigh, San Diego and Shreveport.

provide the sophistication needed for a rapidly evolving industry. For example, before Wieland forged its relationship with Unanet CRM, Shaw hand-produced reports via Excel. Looking back, he regrets losing time having to manipulate data in Excel outside of the CRM, as to gain a vantage point that a product-based CRM couldn't provide.

Another motivator for Shaw? Software as a Service (SaaS) platforms. He discovered this cloud-based software distribution model while exploring his options with Unanet CRM. He admits that he "really liked the idea of a web-based login without having to install software."

The switch to Unanet CRM was largely motivated by Wieland's executives, who recognized the need for a new approach. As the VP of Marketing, Shaw's job at the time was to "examine a couple opportunities and then make an assessment."

Prior to opting for Unanet CRM, Shaw and his cohorts at Wieland considered working with Salesforce or even salvaging its relationship with the previous system. Ultimately won over by excellent customer service and the promise of SaaS, Shaw and the VP of New Business Development suggested Unanet CRM. This recommendation was promptly endorsed by Wieland's CEO.

Wieland's Present Relationship With Unanet CRM

Unanet CRM currently plays a huge role in Wieland's marketing and business development groups. It has also recently been expanded for use by the corporate recruiter. According to Shaw, the transformation within these departments cannot be overstated.

Although the changes within Wieland were swift upon switching to Unanet CRM, Shaw still wanted to give employees ample time to adjust before introducing new initiatives. Now that they've been given the opportunity to "crawl before they walk," Shaw has been pushing more of the platform's capability.

Here are few specific ways their process has changed:

1. Any interaction with clients, new or old, is immediately entered into Unanet CRM.
2. The lead and lead-convert-to-opportunity mechanisms are being used to better track potential business.
3. Wieland is using the opportunity coding system as a way to present monthly opportunity reports to the shareholder team.
4. The phone logging system allows Shaw to track important contact with what he calls the MIP (Most Important Person).

Unanet CRM by Cosential and Repeat Clients

Shaw refers to Wieland as a client-driven company. Repeat business is crucial to the firm's success, and a robust CRM is critical for capturing those essential repeat clients. Unanet CRM's services help Wieland tune in to long-time clients' unique needs, while also addressing the unmet needs of past clients.

Specifically, Wieland's nine shareholders have each been asked to regularly check in on past clients. Thanks to the Unanet CRM platform and support help from a Unanet CRM team member, they were able to produce a report that showed all of their past clients, see who has been spoken to in the last 60 days and highlight about 17 people who may have been ignored in the past. With that information, business leadership was able to reach out and restart relationships that otherwise could have fallen through the cracks.

" Using Unanet CRM and those reports that are getting put out on a regular basis is really changing things and moving it in the right direction. It's been huge."

Unanet CRM by Cosential's Role in Achieving Revenue Goals

Executives at Wieland are pleased by the progress — largely aided by Unanet CRM — the firm has made in a few short years. Shaw explains, “If you looked at where we were three years ago to where we are now, it’s 100 percent improved.”

The primary source of these improvements? Enhanced accountability. Expectations are higher than ever for Wieland’s marketing team members and BDMs, but employees are rising to the occasion. For example, Unanet CRM’s administrative features allow Shaw to determine how frequently business development managers log in. “If I have a BDM who hasn’t logged into Unanet CRM in a week, we have a problem.”

In addition to keeping business development managers accountable, Shaw believes that Unanet CRM’s approach keeps BDMs far more organized than they would be with another CRM. He’s especially enthusiastic about Unanet CRM’s coding system, which tracks sales stages within the sales funnel. Shaw regularly encourages BDMs to reclassify the stage within

the sales funnel, switching between one to 11 based on their current progress. BDMs want their due credit during shareholder meetings, so they make an increased effort to code their opportunities and progress.

Shaw appreciates the volume of relevant data he receives through his company’s CRM. “I can go in and look at a dashboard that shows what our sales funnel is and I now know what our hit rate is... if nothing else, [Unanet CRM] has helped us be really focused on having a high quantity of qualified leads, knowing that if we have that at the top of the funnel, the appropriate part will come out at the bottom of the funnel.”

Shaw sums up Wieland’s relationship with Unanet CRM as follows: “The rising tide is floating all boats higher.” With Unanet CRM’s help, Wieland’s marketing and business development team members are more organized and show more initiative. Unanet CRM keeps all parties accountable, while optimizing operations in all areas of the sales funnel. Equipped with the right CRM and a newfound sense of accountability, there’s no telling what the firm will accomplish in the future.



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