

Winning Growth Strategies: How One Company Juggles 750 Proposals Annually with a Consistent 25% Hit Rate

Motivation for Seeking a New CRM Solution

To support the growth of the company, the organization needed a platform to integrate data across multiple departments. The goal was to provide marketers the real-time data access, not only to create the volume of proposals needed, but also to ensure they're accurate, informative and competitive.

The Challenge

- **Scale.** The legacy system wasn't able to support the needs of its marketing department as the company experienced rapid growth.
- **Improved responsiveness and service.** The organization was unhappy with the level of service it was receiving from the current provider.
- **Supporting the needs of the business while updating the system.** The CEO committed to supporting a new CRM system, but it had to be implemented and integrated within a tight 90-day window.
- **Improved forecasting and analytics.** The senior management team wanted better insights on win rates, performance against plan, and return on effort when deciding on what bids to pursue.

The CRM Solution

The organization selected *Unanet CRM by Cosential* because:

- **It was purpose-built for construction firms.** Providing a centralized and stable environment for the entire organization and multiple divisions without third-party overlays.
- **Scale.** It supported the needs of the organization, which including 16,000 projects involving 1,700 people, and 750 proposals annually.
- **The ability to meet the implementation timeline.** Designed for the industry, the system was ready-made to integrate across functional areas of the organization.
- **Analytics and reporting.** The ability to pull archive data to predict win rates, and enable more accurate bids and forecasting.
- **The Unanet team.** "Every implementation that I've worked with Unanet CRM, I've always felt that Unanet knows my company. They know what I'm nervous about, what I'm OK with. They know that I'm OK to take risks. They know I trust them." – Vice President of Marketing.

Organization Profile

An employee-owned engineering, consulting and construction firm serving clients throughout the United States and internationally. With more than 1,400 employees, the company has doubled in size since 2007.

"We would not be able to submit 750 proposals a year if we couldn't do them efficiently," the VP of Marketing said. "Without that system and without the expertise of staff, the ability to handle four proposals at one time – no one could do that if you don't know where the data is. It has to be there quickly."

"So while they're very stressed about their deadlines, they know they don't have to be stressed about their data."

– VP of Marketing

The Impact

- **Improved proposal quality.** "Once the data was integrated into the Unanet CRM system and it was at their fingertips, they were able to focus more on the message of the proposal" according to the VP of Marketing.
- **Better insight and reporting.** The organization now monitors hit rate by client, industry and practice area enabling customized reports for the senior management team.
- **Increased forecast accuracy.** Marketing identifies and alerts the CEO to which groups will fall short on plan based on their proposal volume and win rate.
- **Win rate improvement.** The company is able to improve its win rate by making data-based "go" or "no-go" decisions, avoiding lost time on proposals with little chance of converting. The organization has seen a jump in hit rate since implementing Unanet CRM. Previously in the teens, it's now up to 25% consistently, jumping even higher at times.
- **Data-driven decision making.** "We are able to use it to look at our competition. Every contract that we pursue, as soon as we hit that submit button, that contract gets re-entered as a developing lead for the next time. So that history is linked. We get to see who won and archive the information used for the bid, including the resumes, it helps us win new opportunities."
- **Better data through continued integration with other systems.** The company connected financial data from Oracle into Unanet CRM, adding to the depth of information and data available for the team.

Meet Unanet CRM by Cosential

Unanet CRM enables Architectural, Engineering, and Construction (AEC) firms to increase revenue while decreasing the cost of winning new business, with Growth and Relationship Management software and services that bring order, control, speed, and efficiency to business development and marketing processes.

As the leader in Growth and Relationship Management software for the AEC industry for over 20 years, we have helped more than 1,000+ AEC firms increase annual revenue and improve productivity in key business development processes by up to 50%.

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