

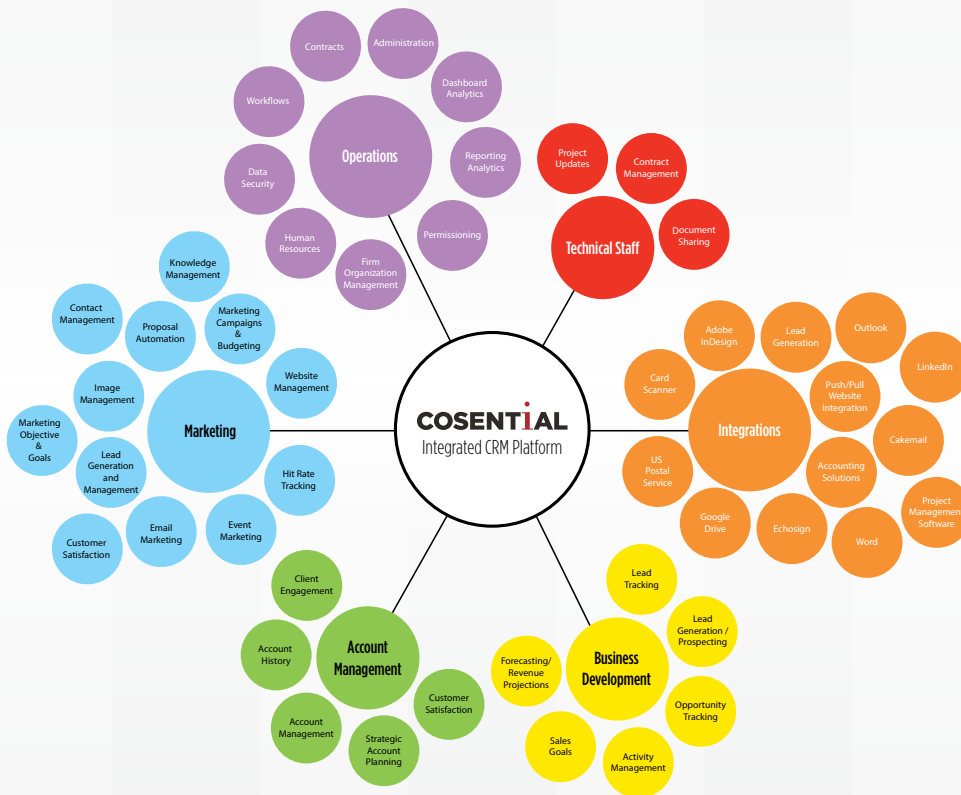
BEST PRACTICES FOR A SUCCESSFUL CRM IMPLEMENTATION



Directions for an AEC Journey

ABOUT US

Cosential provides AEC firms with comprehensive Customer Relationship Management (CRM) and Proposal Automation that works the way you need it to work. Unlike any other solution, ours is built by AEC marketing professionals with a deep understanding of the industry's unique pain points and business processes. From key features to implementation and support, Cosential is tailored to AEC best practices in every way.



To learn more, visit us at www.cosential.com.

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1 INTRODUCTION

Implementing a Customer Relationship Management solution is like a journey. Clearly defined goals can determine your route and guide you to your desired destination. Most Architecture, Engineering and Construction firms quickly realize that the overwhelming benefits justify the trek. With an effective CRM system in place, AEC firms can increase transparency, prepare more targeted submittals, and gain additional insight to make more strategic decisions. A study by IDC, a top global provider of market intelligence, showed that firms with a well implemented CRM solution saw their revenue grow by eight percent in the first year.



At Cosential, we've helped hundreds of AEC firms implement our CRM and Proposal Automation solution. We've learned there's no one right course for implementation and no two AEC firms are the same. That being said, there are some best practices that work for most firms and we've put them together for you in this eBook.

2 IDENTIFY A LEADER

Every journey needs a leader, and a software implementation is no different. There must be one person who is responsible for assembling the team and keeping implementation on track. Our clients have achieved the best results when the implementation leader is from the Marketing or Business Development team.

The staff member best suited to lead an implementation will have:

- the ability to gain cooperation from multiple user groups
- access to key decision makers
- a thorough grasp of your firm's internal culture
- an overall understanding of general business, marketing and business development processes
- the capacity to translate strategic objectives into detailed tasks
- an understanding of the systematic organization of your firm's data



3 SECURE EXECUTIVE BUY-IN

A successful expedition requires the talent and cooperation of many people, but without funding and leadership, it will never get off the ground. Similarly, your CRM system will not succeed without the active support of upper management. You need their authority to ensure you have the resources to implement the new system, and you need their advocacy and directives to get your entire firm on board.



When you develop your business case for adopting a CRM solution, keep all the decision makers in mind. The language should be easily understood by all roles within your firm. **Show your leaders what's in it for them.** Executives' priorities vary based on their specific role and the firm's needs. Many high level managers are more concerned with getting the numbers they need than with how they got them. Show them how a CRM will make it easier to deliver what they want more quickly. Schedule a few minutes at a management meeting to demonstrate the capabilities of the system you want to implement.

You need enthusiastic backing from the top for implementation to go smoothly; a simple nod of approval is not enough. For example, some Cosential clients have adopted the philosophy that if information is not in the system, that information will not be discussed. Other firms have tied efficient data entry to annual reviews. Once you have gained that level of support, you're ready to move forward

4 DEFINE YOUR GOALS



Knowing your destination is essential to planning a successful excursion. Implementing a CRM solution requires the same consideration. It's critical that you define your goals for the new system before you begin. **Clear goals will help you develop the best strategy for your firm.**

if you're mostly interested in tracking activities for your Business Development team.



Questions to reflect on before proceeding:

- How will this new tool fit into your firm's overall strategy?
- List pain points you would like your CRM solution to alleviate.
- What kind of data analysis would you like to see coming out of your CRM system?
- Will the CRM solution replace or eliminate any systems currently in use? If not, how do you plan to effectively use both the CRM solution and any current systems simultaneously?
- Who will use the new CRM? One office? Many?

We put together [this worksheet](#) to help you clarify your CRM implementation goals.

Keep the answers to these questions in mind as you continue onward. Set measurable benchmarks for success and refer back to them as your journey progresses.

5 ANALYZE YOUR BUSINESS PROCESS



Once you know what your goals are, and you have the resources to get started, gather intelligence about the terrain you'll be crossing. In this case, that terrain is your firm's business practices and systems. Map out your firm's entire business process prior to implementation - it's good business practice whether or not you are implementing a CRM solution.

Map the processes that take a project from a lead to an opportunity to a completed project with each department in mind. Is your process as effective as possible? If not, now is the time to streamline.

Once you know how information flows through your firm, identify where the new CRM system will integrate and potentially replace the tasks of other systems. Then you can work with IT to identify systems that will become redundant or obsolete with the implementation of this new software. In addition, determine how to leverage your current software through CRM integrations. For example, Cosential's financial data connector can quickly and securely sync your project-specific financial information to your marketing data within Cosential. This integration ensures that your marketing department has the most comprehensive and correct information when promoting a completed project.

Questions to keep in mind when analyzing your business process:

- How do you currently keep track of opportunities—is each opportunity assigned a number? If so, does that match the number given to the opportunity if it becomes a project in the accounting system?
- How are new job numbers requested/created? For example, do employees make requests via email, or do Project Managers enter all new projects into the financial system?
- How are marketing resources assigned?
- Who else in my firm uses this same data?
- Where does project data come from? Accounting, estimating?
- Is there logic built into our project numbers?

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Before signing off on your updated business process, revisit your list of pain points and verify that your updated business process addresses them. Look again at your implementation goals to ensure that they are aligned with your firm's overall strategy.

TIP:

Oftentimes, implementation falls to Business Development and Marketing staff who may not be as familiar with practices in other departments. When that happens, supplement your implementation team with people from those various departments to get the whole picture of your firm.



6 DESIGN YOUR IMPLEMENTATION

Once you understand your organization's business process and goals, it's important to plan your implementation. A phased approach allows your firm to see some benefits quickly while giving more complex aspects of your CRM ample roll-out time. The stages of implementation will vary based on your firm's needs and the software's capabilities. It is important that you have a thorough, thoughtful plan before you dive in. Review your pain point list to prioritize the phases of implementation.

In order to avoid the swamps of implementation, you should rely on the expertise of someone who has implemented your CRM solution at comparable firms. For example, Cosential's implementation specialists have years of experience working as marketers for AEC firms. That kind of familiarity is essential to an effective implementation.



Tips to avoid the swamp:

- Set realistic goals and timeframes for implementation
- Clean your data before migrating it into the CRM
- Chart your implementation route and stay on course
- Build incentives into your company culture to embrace sharing

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Your firm has implemented other software tools. Seek advice from anyone who has overseen those other software implementations at your firm. Ask them what worked and what to watch out for. Pay particular attention to any specific obstacles or resistance they encountered and how they overcame those challenges.

7 CLEANSE YOUR DATA

A CRM is only going to be as useful as the data you put into it. Garbage in means garbage out. Focus on finding and cleaning the data that will be helpful for winning future projects. Evaluate the usefulness of different data sets and never assume all your data is in one place. Use your updated understanding of your firm's business process to figure out where silos of data might be hiding and track down the owners to ensure the accuracy of the data. Your holiday mailing list might be your most up-to-date data source; have each department/office update their contacts within the list and assign individuals as the "owners" of the data. Make sure your data is formatted in a uniform way. For example, 4/19/1999 is not the same as 4-19-1999, which is not the same as April 19th, 1999. For more tips, check out our [blog post on data cleansing](#).

Be sure to schedule enough time and resources for cleaning up your firm's data. It's a necessary undertaking that's often underestimated, but well worth the effort to do correctly. Break the job down into manageable tasks so that your staff can get it done.

Don't let data update tasks overwhelm you. Putting in the effort upfront will pay off when you go live. Give these small projects real deadlines, set achievable goals, and consider rewarding your team for achieving them. Don't forget to highlight the time savings ROI for all of the upfront data cleanup.

This is the data your firm will rely on, so give it the attention it deserves. Don't skip this pivotal step, because the aftermath of incorrect data will be more time-consuming than dealing with it up front.

8 CREATE A COMMUNICATION STRATEGY

When you begin to implement your CRM solution it's essential that you have a communication strategy to keep everyone at your firm on the same page. Keep your executive team up to date by sending them monthly or bi-monthly progress emails. Engaging them and reminding them of the new solution's value needs to be a top priority. Avoid sending top level managers important information in email attachments - if they check emails on their smartphones, that information could get buried.

Start communicating the benefits of CRM to your whole firm as early as possible. Many people may not even know what a CRM is. If you can identify the staff members that are resistant to change and create a strategy to solve their issues, you can convert CRM skeptics into evangelists. Insights into your organization's culture are extremely useful and can aid in implementation and rollout.



Explain to everyone why this new system is being implemented, what purposes it serves, and how it is going to affect their work. After you've identified how processes will be affected, proactively determine solutions for those changes prior to implementation. If possible, the implementation team should include representatives from every department so that your strategy reflects a firm-wide consensus. Multi-departmental buy-in promotes healthy communication.

As with the management team, other departments will be most receptive if you explain how the CRM will help them reach their goals. Tailor your communications to each group receiving them. For example, you wouldn't send the business development group tips on proposal automation. As with external communications, keep your information appropriate for each audience.

9 PROMOTE USER ADOPTION

Training is paramount to a successful implementation. If your users are not adequately trained, they will not use the CRM. If possible, take the extra time to train different user groups individually.

"I found that generic, company-wide training is easy to ignore as most people think they are a 'special' case, needing the system tailored to them or their specific service line. If I focus my training on them or just their team, they can't ignore our firm-wide initiative."

- Courtney Kearney, CRM Manager, [Hill & Wilkinson General Contractors](#)



Even after training, people are likely to have questions. Make advice available. If you work for a firm with multiple locations, find a volunteer at every office and train them to be a CRM expert. Pay attention to the most common questions and make answers available in documents on the firm's intranet or give them access to your system's support center. **Send out weekly tips and tricks about your CRM and understand that training is not a single event.**

Using the CRM system must be a part of your company culture. This is a crucial component of making implementation a success. Do not let your CRM become "that thing that marketing tried a while ago." Host monthly lunch-and-learns to revisit relevant functionality and present new features. Circulate any success stories you may hear about where the system helped land a deal or otherwise worked effectively. Depending on your firm, you may also need to coordinate with management to add incentives or mandates to get users to start putting data into the system. Some firms we work with find it effective to tie expense reimbursements to Cosential data entry. Be sensitive to your company's culture, and do whatever seems prudent.

10 CONCLUSION

Implementing a CRM solution is an involved process, but most organizations who take the journey are glad they did. A study by the [Society for Marketing Professional Services](#) found that CRM systems offered AEC firms the following benefits: “increased customer acquisition, increased customer retention and loyalty, increased customer lifetime value, increased customer value and profitability, increased customer satisfaction and efficient internal operations.” In order to realize all these benefits, your CRM must grow and shift in response to your organization’s needs. Monitoring these changes will require attention from time to time. Assign someone to maintain the integrity of your data and make that person your overall firm administrator. Finally, create a procedure for training new employees on the CRM system so new hires can quickly adopt your firm’s process.



This eBook presented several Best Practices for leading a successful implementation. Share this eBook with others and use it to help guide your firm through a smooth implementation journey. For more information on implementation and other AEC topics, visit our [blog](#) and check out this complementary webinar “[Keys to a Successful CRM Implementation](#)”. To learn more about Cosential please visit our [website](#) or call us at (800) 505-7089 Ext. 1.