

# CRM in the World of Construction

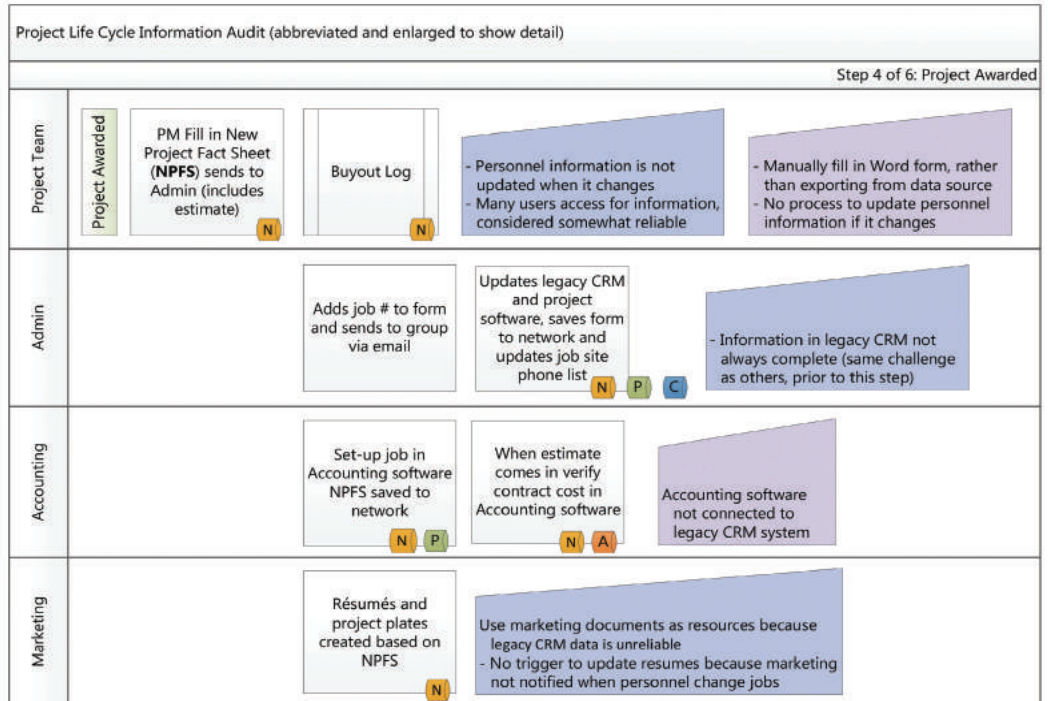
Business Development Best Practices Series

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“It used to take me 45 minutes to prepare for my meeting, now it takes me five!”

“You’re getting rid of a spreadsheet? Revolutionary!”

Since going live with our new customer relationship management (CRM) system, our firm recognizes that comments like these are our reward for a job well done. Like many A/E/C firms, we had a CRM system, but after 20 years, the data had become unreliable and the system was considered a necessary evil by the few who continued to use it. When we decided to transition from our legacy CRM system to something new, we had more questions than answers. Here is how we set out to answer those questions.



## Research

The first step we took in our information gathering stage was interviewing various groups at their department meetings. We asked broad questions like, “What works and what doesn’t?” In addition to getting a sense of who was using the system, these questions helped us identify individuals from each department who had unique processes that we needed to investigate and also who were likely to champion a new system.

Next, we plunged into the nitty gritty of the system and how it was used: Who touches which pieces of information, how often they reference it, what information they really need, and, especially if it wasn’t in the CRM system, how they find it.

We gathered this information via email and individual interviews from all levels of the organization, including people who never used the existing system but received information from it. This comprehensive mapping of our communications behavior helped us incorporate information into the new system that we had previously shared through alternate means, such as spreadsheets and emails. This produced the happy outcome of consolidating where people search for information, resulting in a single, more reliable data source.

## Revelation

This detailed analysis revealed to us that, despite CRM standing for customer relationship management, it makes more sense for our company to organize our process around the life cycle of our projects. This realization was the cornerstone of our



design development process. It allowed us to develop a swim lane diagram in which we broke down the project life cycle into six stages and identified all of the related information and who touches it. If you’re not familiar with a swim lane diagram (see accompanying example), it is a flow chart where a process is visually arranged by jobs, or in our case, by departments.

Our diagram was highly educational. Seeing the communication holes and overlaps gave us the opportunity to make our process more efficient. In addition, exploring the needs of the business development team helped us understand what types of activities we need to track and what types of relationships we want to recognize. It also helped us identify redundancies (new project notifications were saved in five different locations on the server!) along with behavioral and technical challenges:

- Technical challenges included things like the existing CRM system timing out after a short time. If someone took a phone call while entering an activity note, the system would time out and not save it, resulting in the person having to enter it again or, out of frustration, not entering it at all.

- Behavioral challenges revolved around the fact that the data in the CRM system was unreliable. For example, instead of using it to research the number of projects completed for a client, the marketing team turned to past proposals or the project management folders to come up with the number.

## Result

While gathering this data, we purposely did not start our search for a new CRM application so we did not become biased in our thinking. We simply identified all of the information necessary to track a project from being a lead to substantially complete, who needed that information, and when. This clear understanding of our business process translated directly into the build of our new CRM system. When it came time for usability testing, we had only a handful of minor tweaks to make and feedback was universally positive.

That old carpenter’s adage, “measure twice, cut once” definitely rang true for us. We spent about twice as much time preparing for and selecting our new CRM application as we did designing and building the actual system. But without a doubt, capturing our business processes before implementing a new CRM system was the key to our success.

## About the Author:

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