

The 5 Critical Business Benefits of a Project-Based CRM System



Customer Relationship Management (CRM) solutions don't have to be limited to managing just customers. Construction company owners do business with a wide range of stakeholders — partners, general contractors, subcontractors and others. See how you can take your CRM a step further with a solution tailored specifically for the Architecture, Engineering and Construction (AEC) industry. You can optimize the sales process all the way from prospect to project win.



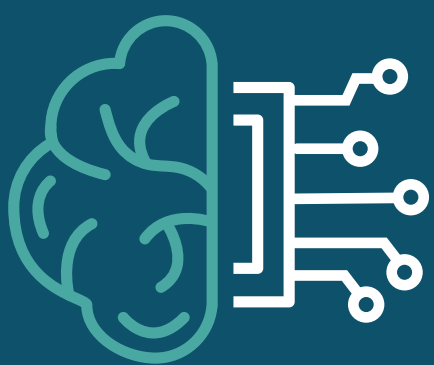
1. It's all in the Project Details

Think of all the information that can be gleaned from past construction projects: labor and materials costs, resource utilization, cost variances and overruns, and more. When you're building a proposal, you need access to this data and the analysis tools that can generate accurate projections. Not only do you want to win the project, but you want to win it with real-life estimates. In the long-run, it alleviates risk and goes a long way toward building positive client sentiment.



2. Identifying the Right Resources and Skills

Complex construction projects rely on employee know-how to sell and win deals. In a professional services firm, employees are tied to every aspect of what is sold and executed. A CRM system should be able to integrate with human resource records for those who need credential and skills information to build proposals. If the system allows for self-service updates, employees can continue to add to their resume as they gain new skills, complete new and complex projects, and achieve new certifications. Think of it as a detailed resume catalog at your fingertips.



3. All-inclusive Cost Projections with AI

AI is always learning and refining itself based on project data. It's machine learning models can refine forecast curves based on project history, and those insights can be applied to new project proposals with similar characteristics. Imagine the AI-driven data points that would be valuable in the AEC industry: risk factors and impact, potential bottlenecks, and a lot more. In addition, AI models can consider third-party, external data like market price indices, subcontractor and supplier costs, and industry benchmarks.



4. Automated Proposal Creation

Proposal writing can be a huge time sink and prone to error — that's partly because we rely on past proposals and continually copy and paste. Customizable proposal templates solve that and can be used to generate initial proposals with pre-populated essential information. You can add automated workflow rules to drive the proposal all the way through to the go/no go decision.



5. Enterprise-wide Business View

Companies don't want silos of data, processes, and workflows — they want a single, holistic, enterprise-wide view into their business. An AEC-tailored CRM can integrate the project details, employee profiles, predictive analytics and proposal automation — are all part of a large dynamic sales-to-execution process that can generate project-winning proposals. And pre-built dashboards clear the clutter because you can see the analysis of all these data sources in one window, and on any device.

Are you Ready for a Project-Centric CRM?

AEC companies function best when their CRM software is designed specifically for their needs. [Hitachi Solutions' CRM accelerator](#) for AEC companies may be the right solution for you. From estimates and sales to forecasting and execution, we've created data connections and automated outputs that you can use to build award-winning proposals.

Our CRM solutions extend [Dynamics 365 Sales](#) and are one more tool you can use to ensure that potential opportunities don't fall through the cracks, stakeholders have the visibility they need to make accurate, timely decisions, and proposals win the project.