How CSArch Stays Organized Despite Managing Thousands of Potential Clients

CSArch—an architecture, engineering, interior design and construction management firm—is constantly developing and maintaining a wide range of relationships.

"Our primary target market is basically any school district within the state of New York, which means there are thousands of schools that are potential clients," said Phillip Quindara, director of marketing at CSArch. "Right now, we're working on five different RFP responses, we have about 10 to 12 opportunities waiting for the award, and we have three opportunities in the Go/No Go stage."

To manage these tasks, Phillip and his team use Unanet CRM by Cosential—the client relationship management (CRM) and proposal writing tool purpose-built for architecture, engineering and construction firms.

"Unanet CRM gives us the ability to quickly see what everyone's working on and what opportunities are out there," Phillip said. "And we can stay on the same page in regard to a specific client by going into the company record to see how we first met them, what the last touch points were and what we talked about."

Before Unanet CRM, CSArch used a CRM…but it didn't have the features and functionality needed to support an architecture firm's project-based sales process, forcing Phillip to look for a new option.

"It was one of those cookie-cutter CRMs, meaning you get the same features whether you're a barber shop or an architecture firm," Phillip explained. "Last year, I started looking for new options, and Unanet CRM was the clear winner."

What made Unanet CRM stand out? Features and functionality designed specifically for architecture, engineering and construction firms.

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> *Unanet CRM by Cosential just does all those special things that are very unique to architecture and engineering firms — it handles construction costs, there's a Go/No Go feature…things like that. "That's one of the main reasons I decided to go with Unanet CRM versus Salesforce or any other solution.*
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> **Phillip Quindara**
> **Director of Marketing**

Unanet CRM's Financial Data Connector (FDC), which integrates Unanet CRM with industry-specific enterprise resource planning (ERP) and financial systems, was another major factor.

"We use Deltek Vision as our ERP, so we looked at their CRM module, but we never really pulled the trigger because we liked Unanet CRM better," Phillip said. "And Unanet CRM integrates with Deltek, so it worked out great."

Now, after using Unanet CRM for nearly a year, Phillip has made the solution part of his daily routine.

"As soon as I get to work, I load up the dashboard and check it out," he said. "It really helps me quickly understand what's going on."

That at-a-glance view of CSArch's sales data helps him track and measure his team's progress, even when other priorities demand his attention.

"Even if I don't have more than a minute, I can quickly go in and get the gist of what's happening almost immediately," Phillip said.

"At the drop of a hat, I can log in to the website, look at the dashboard and have a clear picture of what's happening—what we just won, what we just lost, what's currently in play, what we're waiting on, what future opportunities might be coming up, and more."

When he needs a more in-depth view of marketing and business development performance, Unanet CRM provides that information, as well.

"It's my responsibility to understand the results we're achieving, like our hit rate, and Unanet CRM helps me dive down deeper into that data," Phillip said. "I can see hit rate by market, or I can drill down to see how our office in Albany is performing compared to the White Plains office or the Westchester office."

But Unanet CRM doesn't just help Phillip analyze sales data, it also helps him use data to empower strategic decision-making—including during the Go/No Go process.

"Someone might bring in an opportunity for a school they attended—and they really want to work with that institution—but it's not the right opportunity for us," Phillip said. "We have a Go/No Go form built in Unanet CRM that allows us to take the emotion out of the equation and make an objective decision."

By passing on opportunities that don't make good business sense, Phillip empowers his marketing team to concentrate on the most important opportunities.

"These decisions really matter when you have multiple opportunities, and you need to decide what to focus on," Phillip said.

"Right now, we're already working on six proposals...and that's a lot when you only have a three-person marketing team."

While Phillip appreciates the benefits of Unanet CRM's innovative technology, he knows the solution wouldn't be nearly as impactful without the support and partnership that comes with it.

"The customer service is top notch, and it has been from day one," he said. "When going through implementation, the professional services team came up with a very simple, step by-step process that clearly laid out what we needed to do to successfully set up and use Unanet CRM."

And that personalized service remained long after CSArch completed implementation.

"I have a monthly call with our success manager, which I think is really key," Phillip said. "We talk about what I'm looking for in Unanet CRM, and he tells me how to make it happen. That's really helped to make this relationship successful."

Learn how Unanet CRM can help you improve marketing and business development at your firm.

Where Information Means Insight

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