How Layton Construction's Lean Marketing Team Supports Their Growing, ENR Top 50 Firm

Layton Construction— an ENR Top 50 firm that brought in $1.4 billion in revenue in 2017 — serves the healthcare, office, retail, sports and recreation, higher education, hospitality and warehouse distribution industries in 20 to 30 states at any given time.

And they rely on a lean marketing team to manage pursuits and proposals. "If someone in one of our 10 offices needs any kind of sales support materials, they're reaching out to my team," said Travis Wilson, Director of Marketing. "That's kind of a constant process for us."

The volume of requests they receive eventually strained their proposal management process to the brink...until they found Unanet CRM by Cosential, the Client Relationship Management (CRM) and Proposal Automation solution purpose-built for architecture, engineering and construction (AEC) firms.

"My team was struggling to collect information, and then, when they finally collected what they needed, it didn't always make it into a central repository," Travis said. "We were using this constantly growing spreadsheet to try and keep track of all the data we had, but over time, it just became overwhelming. We were constantly saying to ourselves, 'There's got to be a better way.'"

FINDING THE RIGHT WAY FORWARD

To address this issue, Travis, along with Layton Construction's CFO and IT director, sought a solution that would allow them to easily document, access and search key project data needed to complete proposals. Unanet CRM quickly caught their eye.

"It was pretty highly regarded within the AEC," Travis said. "I knew some of my peers were using it, so I started asking them questions." Soon, one of those firms gave Travis a first-hand demonstration of Unanet CRM's capabilities.

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Taking a closer look proved fruitful, and Layton Construction soon decided to implement Unanet CRM.

"The fact that it was built for the AEC was very attractive," Travis said. "And the ability to pull information from our financial system was also a big factor."

HARNESSING THE POWER OF EASILY ACCESSIBLE DATA

Armed with a central repository of key project data, Travis and his team now quickly develop strategic proposals.

"My marketing team is a lot more self-reliant — we're finding the information we need much quicker, and we're doing it mostly on our own. We just search in Unanet CRM, and it's there," Travis explained.

"It saves considerable time by putting often-needed information at our team's fingertips." And It's not just the marketing team that benefits.

"Before, we had to call or send an email to project managers, who were busy trying to get work done and move on to the next job," Travis said. "We always struggled with project managers saying, 'I know I gave this to someone on your team. Why are you asking for it again?' Now, we have a place to easily store and refer to information once we have it."

Part of what makes Unanet CRM so effective is the Financial Data Connector (FDC), which integrates the solution with their accounting software, CMiC.

"If we ask a project manager, a project engineer and a salesperson a simple question about the value, size or cost of a project, we might get three different answers," Travis said. "But we know the information in our accounting system is correct, so connecting that with Unanet CRM was crucial."

The easy access to key information is also valuable when onboarding new team members.

"We used to struggle with a few people holding key institutional knowledge in their heads. I've been here for 13 years, and I have a few team members who are long-term employees.

We know a lot about our projects, but as we grow and bring in new people, they don't have the historical knowledge we do," Travis said. "With Unanet CRM, they can get a clear idea of the history behind our projects. It definitely gets them up to speed quicker and makes them less reliant on our veteran employees."

In addition, Unanet CRM empowers greater clarity and collaboration during meetings.

"Our team members use it in real time to research and validate data, such as employee qualifications, project details and experience with a particular company or AE firm," Travis said.

Outside of meetings, they use reports to gain insights and plan their customer and prospect outreach strategy. "We are in the process of launching pre-programmed reports that generate results based on state, project status, primary category, select secondary categories, published contract value, awards, architect and client," Travis said. "We find that we frequently use all of these reports to help develop our approach."

He added that Unanet CRM's capabilities help his team better manage their growing responsibilities.

"We wouldn't be able to run this lean and be as effective as we are without this tool," Travis

said. "Using Unanet CRM is almost like having another team member."

But Travis knows the solution wouldn't be as valuable if it wasn't backed by quality customer service. "Our implementation specialist was great, and the customer support in general is very helpful," he said. "We've been really pleased with that."

LAYING THE FOUNDATION FOR SUCCESS

Travis credits much of his success with Unanet CRM to identifying an effective overall firm administrator (OFA).

"She's always communicating with the team," Travis said. "She'll let us know about new configurations she's created or recent Unanet CRM updates. She used to be a proposal manager, so she knows what people are using it for and she understands the kind of information we need. She really helps to keep everyone up to date and engaged with the system."

The decision to have a dedicated OFA led to better solution use and freed Travis to focus on his leadership responsibilities.

"She's been huge in helping to speed up our use of Unanet CRM and get us comfortable with it," Travis said. "Before, I was championing Unanet CRM. But my role is expanding, and I have a number of priorities for the growing department."

Having an OFA also helps Travis manage the increasing interest in Unanet CRM. "Other departments have started asking, 'What can Unanet CRM do for me?' or 'Does this have information that might help me?'" Travis said. "Our OFA has been awesome about handling those discussions and sharing what it can do."

Travis is excited about the prospect of other departments contributing to Unanet CRM's use, and he credits the solution's configurable permission settings with making that goal possible.

"Our current users consist of the marketing director, marketing manager, proposal managers, and marketing coordinators. They're able to view most of the information in Unanet CRM, as well as select reports," he said. "We're looking to add more read-only users in the future, but we anticipate keeping the read/write user base fairly limited to maintain data integrity."

Overall, Unanet CRM empowers Layton Construction's employees to focus on the tasks that lead to more projects and greater revenue … and Travis expects that trend to continue.

"Anyone on our team would tell you how valuable this tool has been," Travis said. "And it gets more and more useful every day."

Learn how Unanet CRM can improve proposal management at your firm.

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