Winning work with a panoramic view of your clients

Get more customers and keep the clients you have.

Great client relationships are at the center of every successful construction business. And as your firm grows, it's critical to maintain your focus on what's happening with key business contacts. Customer relationship management (CRM) processes and software give everyone in your firm access to up-to-date customer and prospect information so you can easily manage business development interactions, keep track of quotes and bids, ensure consistent customer service, and earn more business from existing clients.

Visit our blog

Build more profitable business relationships.

sage

1 Identify your best opportunities.

What's your profit goal, and how will you reach it? Know which customers are the best fit for your business and focus on building great relationships with them.

2 Centralize client data and share information.

When an employee leaves your company, prevent the loss of key contact information. CRM shares information across the organization so you can easily network and communicate with past, current, and future clients.

3 Build a consistent approach to winning work.

Standardize workflow, guide repeatable processes, and ensure consistent marketing, sales, and customer service delivery.

4 Gain visibility.

Monitor your business development pipeline to see trends, measure ROI, and ensure you are on track to keep your backlog full.

5 Be mobile.

Access client and pipeline information anytime and anywhere from your mobile device.
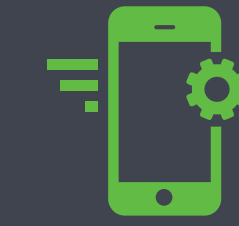
6 Fill your pipeline; cultivate a backlog.

Referrals   Repeat business

Best-fit work

⚠ **Competitive advantage alert:**
Only 11% of contractors are using CRM software to obtain new business.*

Marketing
- Launch email campaigns to generate leads.
- Measure effectiveness of marketing campaigns.
- Keep in touch with existing clients to obtain referrals and win repeat business.
- Tap into social media activity for a more holistic view of the customer.

Sales
- Target clients and projects to go after.
- Log conversations and emails and schedule follow-up activities with key decision makers.
- View a pipeline that tracks all your quotes and bids.
- Forecast project backlog and report on bid activity.
- View trends to improve your bid strategy.
- Compare the activity and results of your business development and sales staff.

Customer service
- View history of interactions with the customers for meaningful conversations.
- Track and respond to customer issues.
- Log conversations and schedule follow-up activities for improved account management.
- Report on and view issues that can impact overall customer service.
- Encourage repeat business by delivering better customer service.